



# Pega Foundation for Insurance '23

4 March 2024

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# Get started with Pega Foundation for Insurance

Explore the links below to access product documentation and other useful information for Pega Foundation for Insurance

## Learn about

- [Release notes](#)
- [Product overview](#)

## Setup

- [Install](#)
- [Upgrade](#)
- [Implement](#)

## Use

- [Hotfixes](#)



# Release notes

- [Pega Foundation for Insurance '23 release notes](#)

## Pega Foundation for Insurance '23 release notes

Pega Foundation for Insurance '23 features an updated user experience that is based on Pega Platform '23 functionality.

For more information and a list of additional documents available for this release, see the [Pega Foundation for Insurance product](#) page.

For a complete list of new features, see the [Release Notes](#).

- [Pega Foundation for Insurance '23 enhancements](#)
- [Issues addressed in this version](#)
- [Known issues in this version](#)
- [Deprecated and withdrawn rules](#)

## Pega Foundation for Insurance '23 enhancements

In this release, we have worked on following items:

- Table sections of Product Designer portal in PBI and customer management screen in Case Manager portal of PFI now leverage the Optimize code and Personalize table options that convert UI-Kit table sections to React-based UI, for



improved usability and experience (visibility, sorting, saving views, and so on.)

PEGA Product Designer Dashboard Catalog Components Product Questions Reports Settings

Catalog

Products Bundles

Final products Pending products

Search...

Group Fields Density

Refresh Default view Keyboard

Product ID ↑	Component code	Name	Line of business	Variants	Effective date	Expiration date	Status	Actions
COMMAUTOCONSTRUC	PRD-73004	Commercial auto insurance - construction_Copy	Commercial Auto	0	10/15/2017		Active	Actions
COMMAUTOCONSTRUCTION	PRD-27	Commercial auto insurance - construction	Commercial Auto	---	10/15/2017		Active	Actions
COMMAUTOSELECT	PRD-9517	Commercial auto insurance - select	Commercial Auto	---	10/15/2017		Active	Actions
COMMAUTOSUPREME	PRD-62003	Commercial auto insurance - supreme	Commercial Auto	0	10/15/2017		Active	Actions
COMMAUTOSUPREMEOLD	PRD-4043	Commercial auto insurance - supreme old	Commercial Auto	0	10/15/2017		Active	Actions
COMMAUTOTRANSPORT	PRD-28	Commercial auto insurance - transportation specialty	Commercial Auto	---	10/15/2017		Active	Actions
COMMGLFINANCIAL	PRD-23	Commercial general liability - financial services	Commercial General Liability	---	10/15/2017		Active	Actions
COMMGLSELECT	PRD-9521	Commercial general liability - select	Commercial General Liability	---	10/15/2017		Active	Actions
COMMGLSMALL	PRD-30	Commercial general liability - small commercial	Commercial General Liability	---	10/15/2017		Active	Actions
COMMGLSUPREME	PRD-62004	Commercial general liability - supreme	Commercial General Liability	0	10/15/2017		Active	Actions
COMMGLSUPREMEOLD	PRD-4041	Commercial general liability - supreme Old	Commercial General Liability	0	10/15/2017		Active	Actions
COMMGLTECHNOLOGY	PRD-24	Commercial general liability - technology sector	Commercial General Liability	---	10/15/2017		Active	Actions
COMMPROPQWIND	PRD-20	Commercial property - earthquake and wind exposures	Commercial Property	0	10/15/2017		Active	Actions
COMMPROPRETRES	PRD-19	Commercial property - retail and residential	Commercial Property	---	10/15/2017		Active	Actions
COMMPROPSELECT	PRD-9522	Commercial property - select	Commercial Property	---	10/19/2017		Active	Actions

1 2 Next

- North American Industry Classification System (NAICS) codes have been updated from the current 2012 version to the latest 2022 revision.

NAICS Code ↑	NAICS Code Description
339112	Surgical and Medical Instrument Manufacturing
339112	Surgical and Medical Instrument Manufacturing
339113	Surgical Appliance and Supplies Manufacturing
339113	Surgical Appliance and Supplies Manufacturing
339113	Surgical Appliance and Supplies Manufacturing
339113	Surgical Appliance and Supplies Manufacturing
339113	Surgical Appliance and Supplies Manufacturing
339113	Surgical Appliance and Supplies Manufacturing
339113	Surgical Appliance and Supplies Manufacturing
339113	Surgical Appliance and Supplies Manufacturing
339113	Surgical Appliance and Supplies Manufacturing
339113	Surgical Appliance and Supplies Manufacturing
339114	Dental Equipment and Supplies Manufacturing
339115	Ophthalmic Goods Manufacturing
339115	Ophthalmic Goods Manufacturing
339116	Dental Laboratories

- Over 100 unreferenced or orphan PFI and PBI rules were analyzed and marked as deprecated or withdrawn for easier maintenance. See the [Pega Foundation for Insurance product page](#) to view the full list of such rules

## Issues addressed in this version

The following issues are resolved in this release.

For each issue, a reference number is provided, and the prefix of the reference number indicates the issue type. You can use the reference number of an issue in your related conversations with [Pega Support](#).



The release notes include the following issue types:

### INCs

Customer-reported incidents. For example, INC-183895.

### SRs

Support requests, which were used instead of incidents in older releases. For example, SR-D79601.

### ISSUEs

Pega-identified issues. They might or might not be related to customer-reported incidents. For example, ISSUE 654263 (which might also be written as just 654263).

### SEs

Sustenance engineering activities. For example, SE-60265.

Starting Q2 2021, all customer-reported issues are logged as INCs. You can view INCs that you logged in the [My Support Portal](#). INCs logged by other Pega customers, and all other issue types (SR, ISSUE, and SE), are available in Pega internal tracking systems, in addition to these release notes.

Issue ID	Description
INC-260169	Unable to edit or update a product in PBI
INC-261946	Product Builder utility issue
INC-270011	Properties missing in contact class
INC-271021	Status property in case is being updated to "Active"

## Known issues in this version

There following is the *Known issue* for this release.

Agile Studio ID	Issue	Described in Release notes?
BUG-751306	App feature description accepts special characters which is causing issues with DB2 database.	Yes



**Note:** To submit new issues or find out more about known issues, or to request a hotfix, go to the [Pega Product Support Community](#). Look up or subscribe to your Support Requests (INCs) in [My Support Portal](#). Ensure that you refer to the issue ID in all communications.

## Deprecated and withdrawn rules

Pega Foundation for Insurance has deprecated some rules during the releases to better maintain the product and make it easier for you to extend rules when needed. After two releases these rules will be withdrawn as a practice.

The following table lists the count of deprecated and withdrawn rules for every release in Pega Foundation for Insurance.

Release	Deprecated Rules	Withdrawn Rules
'23	42	70
8.8	158	56
8.7	7	142
8.6	920	143
8.5	57	0
8.4	0	0
8.3	1	0

Release	Deprecated Rules	Withdrawn Rules
8.2	0	8
8.1	86	41

- [Deprecated rules](#)
- [Withdrawn rules](#)

## Deprecated rules

This page lists the list of deprecated rules of Pega Foundation for Insurance for 8.x releases.

### '23 Deprecated rules

The following table lists the deprecated rules of Pega Foundation for Insurance for '23 release.

Name	Rule Type	Applies to	Ruleset
TestSec	Section	@baseclass	PegaIns-Product
GLTestHeader	Section	Data-Portal	PegaIns-Product
NoResultsEmptySection	Section	@baseclass	PegaInsure
TestSecPI	Section	@baseclass	PegaInsure
Testnegligence	Section	PegaIns-Data-ClaimCmp-Investigation-	PegaInsure
UpdateContactProfile	Section	PegaIns-Data-Customer	PegaInsure
RiskEdit	Section	PegaIns-Data-InsurancePolicy	PegaInsure

Name	Rule Type	Applies to	Ruleset
RiskEdit_test	Section	PegaIns-Data-InsurancePolicy-Commercial-Property	PegaInsure
BasicCustomerInfo	Section	PegaIns-Data-Party-	PegaInsure
CustomerContactBUReportHolder	Section	PegaIns-Data-Party-	PegaInsure
GaragingLocationsNew	Section	PegaIns-Data-PolCmp-InsuredPropertyLocation	PegaInsure
InsuredData	Section	PegaIns-Data-PolCmp-Product-Term	PegaInsure
IIFManagerProcess	Section	PegaIns-Data-Portal	PegaInsure
AcceptanceBar	Section	PegaIns-Data-Quote	PegaInsure
PremiumSummary	Section	PegaIns-Data-Quote	PegaInsure
CASelectContactByPolicyID	Section	PegaIns-Work	PegaInsure
CreateEmailUI	Section	PegaIns-Work	PegaInsure
Flow	Section	PegaIns-Work	PegaInsure
PolicyListForPolicyholder_Date_Type	Section	PegaIns-Work	PegaInsure
ValidateFeatureOptions	Activity	PegaIns-Data-PolCmp-AutoCoverage-NotClaimable	PegaInsure

Name	Rule Type	Applies to	Ruleset
AdjustedPremiumCalc	Activity	PegaIns-Data-PolCmp-Payment	PegaInsure
SetCBACClassList	Data Transform	Code-Pega-List	PegaInsure
getEmailSenderInfo	Activity	PegaIns-Work	PegaInsure
CustomerDataEntry_kavitha	Flow	PegaIns-Data-Submission-Life	PegaInsure
AgencyDisplayTest	Section	PegaIns-Data-Party-Org-Agency	PegaInsure
Temp	Section	PegaIns-Data-Party-Org-Agency	PegaInsure
CommercialAutoACV	Section	PegaIns-Data-PolCmp-AutoCoverage	PegaInsure
ComponentEntryForADBBenefit	Section	PegaIns-Data-PolCmp-Coverage-	PegaInsure
RiskCoveragesRight	Section	PegaIns-Data-PolCmp-InsuredCommercialPropertyLocation	PegaInsure
RiskEditCoverages	Section	PegaIns-Data-PolCmp-InsuredCommercialPropertyLocation	PegaInsure
ShowCoverages	Section	PegaIns-Data-PolCmp-InsuredCommercialPropertyLocation	PegaInsure

Name	Rule Type	Applies to	Ruleset
temp	Section	PegaIns-Work- ManageCustomerAc count	PegaInsure
UpdatePersonFrom Search	Activity	Code-Pega-List	PegaInsure
PartyVerify	Activity	Data-Party	PegaInsure
Component_Read_I nstances	Activity	PegaIns-	PegaInsure
Figure_Feature_Exp osure	Activity	PegaIns-	PegaInsure
GetFeatureExposur e	Activity	PegaIns-	PegaInsure
ValidateFeatureOpt s	Activity	PegaIns-	PegaInsure
lifContactSearch	Activity	PegaIns-Data-Party- Person	PegaInsure
PartySearch1	Activity	PegaIns-	PegaInsure
PageRemove	Activity	PegaIns-Work	PegaInsure
DeletePolicy	Activity	PegaIns-Work- ChgPolicy	PegaInsure

## 8.8 Deprecated rules

The following table lists the deprecated rules of Pega Foundation for Insurance for 8.8 release.

Name	Rule Type	Applies to	Ruleset
LoadEnvironmentFo rlif	Activity	PegaIns-Data-Env	PegaInsure

Name	Rule Type	Applies to	Ruleset
GetPolicy	Activity	PegaIns-Interface-InsurancePolicy	PegaInsure
SetNextGenExposedColumns	Activity	PegaIns-Interface-InsurancePolicy	PegaInsure
InitialClipboardCleanup	Activity	PegaIns-Work	PegaInsure
PopulateAgentData	Activity	PegaIns-Work	PegaInsure
ToClaimsRepresentative	Activity	PegaIns-Work	PegaInsure
CalculatePayment	Activity	PegaIns-Work-Application	PegaInsure
PartyNewSetup2	Activity	PegaIns-Work-Application	PegaInsure
PrePopulateState	Activity	PegaIns-Work-Application	PegaInsure
PostCleanUp	Activity	PegaIns-Work-ChgPolicy	PegaInsure
PreCleanUp	Activity	PegaIns-Work-ManageCustomerAccount	PegaInsure
InitializeRadarChart	Activity	Work-	RadarChart
Validate	Activity	Rule-InsProd-Coverage	PegaIns-Product
Validate	Activity	Rule-InsProd-PriceAdj	PegaIns-Product
Validate	Activity	Rule-InsProd-Product	PegaIns-Product



Name	Rule Type	Applies to	Ruleset
pyPropertyRef	Property	Embed- EFormParameter	PegaInsure
pySSN	Property	PegaIns-Data-Party- Person-Employee	PegaInsure
pyDefault	Data Transform	PegaIns-CSB-Work- FNOL-Auto	PegaInsure
pyDefault	Data Transform	PegaIns-Data- BroadOccupations	PegaInsure
pyDefault	Data Transform	PegaIns-Data- CodeTable	PegaInsure
pyDefault	Data Transform	PegaIns-Data- DetailedOccupation	PegaInsure
pyDefault	Data Transform	PegaIns-Data- EventExposureDivisi on	PegaInsure
pyDefault	Data Transform	PegaIns-Data- EventExposureMino r	PegaInsure
pyDefault	Data Transform	PegaIns-Data- EventExposureSub	PegaInsure
pyDefault	Data Transform	PegaIns-Data- HazardCodes	PegaInsure
pyDefault	Data Transform	PegaIns-Data- InjuryCode	PegaInsure
pyDefault	Data Transform	PegaIns-Data- InjuryDivision	PegaInsure
pyDefault	Data Transform	PegaIns-Data- InjuryMinorCode	PegaInsure

Name	Rule Type	Applies to	Ruleset
pyDefault	Data Transform	PegaIns-Data-InjurySubCode	PegaInsure
pyDefault	Data Transform	PegaIns-Data-InvestigativeEvents	PegaInsure
pyDefault	Data Transform	PegaIns-Data-LOBsByPartyType	PegaInsure
pyDefault	Data Transform	PegaIns-Data-MajorOccupations	PegaInsure
D_pyCBACPolicyClassList	Data Page	Rule-Access-Clientdata	PegaInsure
pyWorkActionsReview	Navigation	Work-	PegaInsure
OpenDefaults	Activity	PegaInsProd-Work-Accel-Coverage	PegaIns-Product
OpenDefaults	Activity	PegaInsProd-Work-Accel-Form	PegaIns-Product
OpenDefaults	Activity	PegaInsProd-Work-Accel-Product	PegaIns-Product
OpenDefaults	Activity	PegaInsProd-Work-Accel-RiskType	PegaIns-Product
pyButtonLabel close	Field Value	@baseclass	PegaInsure
pyButtonLabel Reply	Field Value	@baseclass	PegaInsure
pyCaption and	Field Value	@baseclass	PegaInsure
pyCaption Between	Field Value	@baseclass	PegaInsure
pyCaption Customer Name	Field Value	@baseclass	PegaInsure

Name	Rule Type	Applies to	Ruleset
pyCaption Last Update	Field Value	@baseclass	PegaInsure
pyCaption Monday	Field Value	@baseclass	PegaInsure
pyCaption Reporting manager	Field Value	@baseclass	PegaInsure
pyCaption Salutation	Field Value	@baseclass	PegaInsure
pyCaption Saturday	Field Value	@baseclass	PegaInsure
pyCaption Tuesday	Field Value	@baseclass	PegaInsure
pyCaption Wednesday	Field Value	@baseclass	PegaInsure
pyMessageLabel numeric_integerMs gStr	Field Value	@baseclass	PegaInsure
pyStatusLabel New	Field Value	@baseclass	PegaInsure
pyStatusLabel Resolved-Completed	Field Value	@baseclass	PegaIns-Product
pyCaption Email	Field Value	PegaIns-	PegaInsure
pyCaption Year	Field Value	PegaIns-	PegaInsure
pyCaption Location	Field Value	PegaIns-Data-InsurancePolicy-Commercial-WC	PegaInsure
pyStatusWork New	Field Value	PegaIns-Work	PegaInsure
pyCaption No Actions	Field Value	Work-	PegaInsure
pyDefault	Data Transform	PegaIns-Data-Make	PegaInsure

Name	Rule Type	Applies to	Ruleset
pyDefault	Data Transform	PegaIns-Data-PaymentCodes	PegaInsure
pyDefault	Data Transform	PegaIns-Data-PolCmp-CoverageDefaults	PegaInsure
pyDefault	Data Transform	PegaIns-Data-PolCmp-Customer	PegaInsure
pyDefault	Data Transform	PegaIns-Data-PolCmp-SurveyResult	PegaInsure
pyDefault	Data Transform	PegaIns-Data-SICGroup	PegaInsure
pyDefault	Data Transform	PegaIns-Data-SicToNaics	PegaInsure
pyDefault	Data Transform	PegaIns-Data-VehicleInfo	PegaInsure
pyDefault	Data Transform	PegaIns-Data-Vendor	PegaInsure
pyDefault	Data Transform	PegaIns-Data-VldtOccupEventExp o	PegaInsure
pyDefault	Data Transform	PegaIns-Interface-Vehicles	PegaInsure
pyDefault	Data Transform	PegaInsProd-Data-InsuranceType	PegaIns-Product
pyDefault	Data Transform	PegaInsProd-Data-Jurisdiction-Primary	PegaIns-Product

Name	Rule Type	Applies to	Ruleset
pyDefault	Data Transform	PegaInsProd-Data-MarketSegment	PegaIns-Product
HomePhone	Validate	Data-Party	PegaInsure
OnAdd	Validate	PegaIns-Work-Application	PegaInsure
Validate	Validate	Rule-InsProd-Coverage	PegaIns-Product
pyGeolocationTrackingsEnabled	When	PegaInsProd-Work-Accel-Form	PegaIns-Product
Validate	Validate	Rule-InsProd-Form	PegaIns-Product
pyGetAllAttachments	Report Definition	Link-Attachment	PegaInsure
pyCaption Email Address	Field Value	@baseclass	PegaInsure
pyStandardCMAssignment	Flow	PegaIns-CSB-Work-ScheduledActivity	PegaInsure
AssociatedWork ALL	Deprecated: Summary View	Index-WorkPartyUri	PegaInsure
Validate	Validate	PegaIns-Data-Attorney	PegaInsure
Validate	Validate	PegaIns-Data-DetailedOccupation	PegaInsure
Validate	Validate	PegaIns-Data-EventExposureDivision	PegaInsure

Name	Rule Type	Applies to	Ruleset
Validate	Validate	PegaIns-Data-EventExposureMajor	PegaInsure
Validate	Validate	PegaIns-Data-MajorOccupations	PegaInsure
Validate	Validate	PegaIns-Data-Make	PegaInsure
Validate	Validate	PegaIns-Data-Model	PegaInsure
Validate	Validate	PegaIns-Data-Party-Person	PegaInsure
Validate	Validate	PegaIns-Data-PaymentCodes	PegaInsure
Validate	Validate	PegaIns-Data-PolCmp-CoverageDefaults	PegaInsure
Validate	Validate	PegaIns-Data-PolCmp-Customer	PegaInsure
Validate	Validate	PegaIns-Data-PolCmp-SurveyResult	PegaInsure
Validate	Validate	PegaIns-Data-SICDivision	PegaInsure
Validate	Validate	PegaIns-Data-SicToNaics	PegaInsure
Validate	Validate	PegaIns-Data-TermLimits	PegaInsure
PrimaryAddress	Property	PegaIns-Data-Address-	PegaInsure

Name	Rule Type	Applies to	Ruleset
NewCoreSummary	Section	PegaIns-Work-Application	PegaInsure
Validate	Validate	PegaIns-Data-TermPrices	PegaInsure
Validate	Validate	PegaIns-Interface-Agency	PegaInsure
Validate	Validate	PegaIns-Interface-Agent	PegaInsure
OnAdd	Validate	PegaIns-Work-Application-Com-	PegaInsure
Validate	Validate	PegaInsProd-Data-InsuranceType	PegaIns-Product
Validate	Validate	PegaInsProd-Data-Jurisdiction-Primary	PegaIns-Product
UpdateNamedDriver	Activity	PegaIns-Data-CustomerAccount	PegaInsure
UpdateNamedInsured	Activity	PegaIns-Data-CustomerAccount	PegaInsure
WritePolicy	Activity	PegaIns-Work	PegaInsure
UpdateNamedInsured	Activity	PegaIns-Work-ManageCustomerAccount	PegaInsure
EmployeeBenefits	Section	PegaIns-Data-Application-Comm-GL	PegaInsure
RemittanceInformation_ReadOnly	Section	PegaIns-Data-ClaimCmp-	PegaInsure

Name	Rule Type	Applies to	Ruleset
		SubrogationClaimDetails	
DriverInjuryInformation	Section	PegaIns-Data-ClaimCmp-VehicleInvolvedInClaim	PegaInsure
PassengerInjuryInformation	Section	PegaIns-Data-ClaimCmp-VehicleInvolvedInClaim	PegaInsure
DiseaseDetails	Section	PegaIns-Data-ClaimCmp-WorkersCompLossOccurrence	PegaInsure
CustomerAppContactMarketingPrefs	Section	PegaIns-Data-CustomerAccount	PegaInsure
getCustomerProfileDetails	Section	PegaIns-Data-CustomerProfile	PegaInsure
getCustomerProfileDetails_rikek	Section	PegaIns-Data-CustomerProfile	PegaInsure
AddEmailAddress	Section	PegaIns-Data-Email-	PegaInsure
AddManualWorkParties	Section	PegaIns-Data-Party-	PegaInsure
SubjectSummaryEdit	Section	PegaIns-Data-Party-	PegaInsure
AgencyInfo	Section	PegaIns-Data-Party-Org-Agency	PegaInsure



Name	Rule Type	Applies to	Ruleset
GeneralPartyDisplay	Section	PegaIns-Data-Party-Org-Company	PegaInsure
OrganizationDisplay	Section	PegaIns-Data-Party-Org-Company	PegaInsure
PartyDetails	Section	PegaIns-Data-Party-Person	PegaInsure
AttachFile	Section	PegaIns-Work	PegaInsure
ProductsInLOB	Section	Rule-InsProd-Product	PegaIns-PBFW
DetermineCurrencyRates	Connect SOAP	PegaIns-	PegaInsure
Validate	Activity	Rule-InsProd-Form	PegaIns-Product
webwb workform_agentbrokerportalskin.css	Text File		PegaInsure
webwb workform_agentbrokerportalskin_extension.css	Text File		PegaInsure
webwb workform_compositebrand.css	Text File		PegaInsure
webwb workform_compositebrandiif.css	Text File		PegaInsure
webwb workform_composit	Text File		PegaInsure

Name	Rule Type	Applies to	Ruleset
ebrandiif_extension css			
webwb workform_composit ebrand_extension css	Text File		PegaInsure
webwb workform_enduser 62_ins css	Text File		PegaInsure
webwb workform_enduser 62_ins_extension css	Text File		PegaInsure
webwb workform_pycmho memaria css	Text File		PegaInsure
webwb workform_pycmho memaria_extension css	Text File		PegaInsure
PromptStateFieldVa lue	Control		PegaInsure
InitializeBeneficiary Details	Activity	PegaIns-Data- Application-Life	PegaInsure
InitializeInsuredDet ails	Activity	PegaIns-Data- Application-Life	PegaInsure
InitializePolicyOwne rDetails	Activity	PegaIns-Data- Application-Life	PegaInsure

Name	Rule Type	Applies to	Ruleset
SetInsuredFullName	Activity	PegaIns-Data-Application-Life	PegaInsure
LoadEnvironmentForInsurance	Activity	PegaIns-Data-Env	PegaInsure
CalculatePayment	Activity	PegaIns-Data-InsurancePolicy	PegaInsure
UpdatePolicyStatus	Activity	PegaIns-Data-InsurancePolicy	PegaInsure
ResetDependentField	Activity	PegaIns-Data-Party-Person-Employee	PegaInsure
PriceBuilding	Activity	PegaIns-Data-PolCmp-BuildingValuation	PegaInsure
InsuredProductsChosen	Activity	PegaIns-Data-PolCmp-Party-Person-Insured	PegaInsure
AnalyzeSelectedParty	Activity	PegaIns-Work	PegaInsure
CopyPartyData	Activity	PegaIns-Work	PegaInsure
PostCleanUp	Activity	PegaIns-Work	PegaInsure
ResetPartyPages	Activity	PegaIns-Work	PegaInsure
SetConfirmParam	Activity	PegaIns-Work	PegaInsure
ToApplicant	Activity	PegaIns-Work	PegaInsure
ToClaimsRep	Activity	PegaIns-Work	PegaInsure
DefaultProductData	Activity	PegaIns-Work-Application-Indiv-TermLife	PegaInsure

Name	Rule Type	Applies to	Ruleset
CalculatePayment	Activity	PegaIns-Work-ChgPolicy	PegaInsure
InsPolicyInactivate	Activity	PegaIns-Work-ChgPolicy	PegaInsure

## 8.7 Deprecated rules

The following table lists the deprecated rules of Pega Foundation for Insurance for 8.7 release.

Rule Type	Rule Name	Applies to	Ruleset	Ruleset version
Section	AgencyInfo	PegaIns-Data-Party-Org-Agency	PegaInsure	08-07-01
Report Definition	DataTableEditorReport	PegaIns-Data-LOBsByPartyType	PegaInsure	08-07-01
Report Definition	DataTableEditorReport	PegaIns-Data-Model	PegaInsure	08-07-01
Report Definition	DataTableEditorReport	PegaIns-Data-PolCmp-CoverageDefaults	PegaInsure	08-07-01
Report Definition	DataTableEditorReport	PegaIns-Data-PolCmp-Customer	PegaInsure	08-07-01
Report Definition	DataTableEditorReport	PegaIns-Data-PolCmp-SurveyResult	PegaInsure	08-07-01

Rule Type	Rule Name	Applies to	Ruleset	Ruleset version
Report Definition	ListDuplicateFNOLs	PegaIns-CSB-Work-FNOL	PegaInsure	08-07-01

## 8.6 Deprecated rules

The following table lists the deprecated rules of Pega Foundation for Insurance for 8.6 release.

Rule Type	Rule Name	Applies To
Activity	AccountDataMove	PegaIns-Data-PolCmp-Customer
Flow	ActionEnterProductDataTree	PegaIns-Work
Flow	ActionEnterProductDataTree	Work-
Activity	ActionFinalCheck	PegaIns-Work
Activity	ActionFinalCheck	PegaIns-Work-Application
Activity	ActionGetCustomerData	PegaIns-Work-Application-Pers-Automotive
Activity	ActionInitConfirmSegment	PegaIns-Work
Activity	ActionInitSegment	PegaIns-Work
Activity	ActionSetUpProduct	PegaIns-Data-PolCmp-Product-

Rule Type	Rule Name	Applies To
Activity	ActionSetUpProduct	PegaIns-Work-Application
Activity	AddAddressForContact	PegaIns-
Activity	AddClaimantAttachments	PegaIns-CSB-Work-ClaimUnit-Life-Beneficiary
Activity	AddCommOptionForContact	PegaIns-
Activity	AddContact	PegaIns-
Activity	AddContactAndMCA	PegaIns-
Activity	AddCoveredApplication	PegaIns-Work-Package
Section	AddCustomerAccountContact	PegaIns-Work
Section	AddEmailAddress	PegaIns-Data-Email-
Section	AdditionalInsuredDisplay	PegaIns-Data-CustomerAccount
Section	AddManualWorkParties	PegaIns-Data-Party-
Activity	AddPersonalInjury	PegaIns-Data-ClaimCmp-PartyInvolvedInClaim
Data Transform	AddPolicyDetailPage	PegaIns-Interface-InsurancePolicy

Rule Type	Rule Name	Applies To
Activity	AddRemoveTempCoveragePg	PegaIns-Data-InsurancePolicy-Commercial-Property
Section	AddressDisplay	PegaIns-Data-CustomerAccount
Flow Action	AddTelephoneNumber	PegaIns-Work-ManageCustomerAc
Flow Action	AddWebsiteInformation	PegaIns-Work-ManageCustomerAc
When	AddWorkAllowed	Work-Cover-
When	AddWorkAllowed_Eddie	Work-Cover-
Activity	AdjustAtFaultPercentages	PegaIns-Data-ClaimCmp-Investigat
Flow Action	AdjustReserveAmount	PegaIns-CSB-Work-ClaimUnit-
Section	AgencyInfo	PegaIns-Data-Party-Org-Agency
Data Transform	AgentBuListMapper	Code-Pega-List
Data Transform	AgentContactListMapper	Code-Pega-List
Flow	AppAddContact	PegaIns-Work-Contact
Flow	AppAddContactAndMCA	PegaIns-Work-Contact

Rule Type	Rule Name	Applies To
Flow Action	AppAddContactRecord	PegaIns-Work
Section	AppAddContactRecordFromSearch	PegaIns-Work
Section	AppAddPrimaryRecordComm	PegaIns-Work
Flow Action	AppAddPrimaryRecordComm	PegaIns-Work
Activity	AppBeforeNewContact	PegaIns-Work-Contact
Activity	AppBUDetails	PegaIns-Work
Activity	AppBUIDOrBUName	PegaIns-Work
Activity	AppCallAppReadContactListFromSearch	PegaIns-Work
When	AppCheckCommunicationPreference	PegaIns-Work-Contact
Validate	AppCheckContactProfile	PegaIns-Work
Activity	AppCheckDupPolicyContactLink	PegaIns-Work
When	AppContactPageExists	PegaIns-
Activity	AppCreateBusinessUnitParty	PegaIns-Work



Rule Type	Rule Name	Applies To
Section	AppEnterNewBUInfo	PegaIns-Interface-BusinessUnit
HTML	AppFindBusinessUnit	PegaIns-Work
Flow Action	AppFindBusinessUnit	PegaIns-Work-ManageCustomerAc
Activity	AppFindByBU	PegaIns-Work
Activity	AppFindByBUFromSearch	PegaIns-Work
HTML	AppFindContact	PegaIns-CSB-Work
Activity	AppFindContact	PegaIns-Work
Flow Action	AppFindContact	PegaIns-Work
HTML	AppFindContact	PegaIns-Work
Flow Action	AppFindContact	PegaIns-Work-ManageCustomerAc
HTML	AppFindContact	PegaIns-Work-ManageCustomerAc
HTML	AppFindContactNew	PegaIns-Work
Flow Action	AppFindCustomer	PegaIns-Work

Rule Type	Rule Name	Applies To
Flow	AppGetBusinessUnit	PegaIns-Work
Activity	AppGetIndustryAndCustTypes	PegaIns-Work
Correspondence Fragment	ApplicantDetails Mail	
Activity	AppMapBusinessunitPartyDetails	PegaIns-Work
Flow Action	AppNewContact	PegaIns-Work-Contact
Flow Action	AppNewContactAndMCA	PegaIns-Work
Section	AppPolicyContactUnLink	PegaIns-Work
Flow Action	AppPolicyContactUnLink	PegaIns-Work
Activity	AppPostBURead	PegaIns-Data-Party-Org-
Activity	AppReadAccountList	PegaIns-Interface-InsurancePolicy
Activity	AppReadAccountList	PegaIns-Work
Activity	AppSaveBURecordDetails	PegaIns-Work
Activity	AppSaveContactRecordFromSearch	PegaIns-Work

Rule Type	Rule Name	Applies To
Activity	AppSaveNamedInsured	PegaIns-Work
Activity	AppSavePolicyContactLink	PegaIns-Work
Activity	AppSavePolicyContactUnlink	PegaIns-Work
Section	AppSelectContactByBU	PegaIns-Work
Flow Action	AppSelectContactByBU	PegaIns-Work
Section	AppUpdateContactAddress	PegaIns-Work-ManageCustomerAc
Section	AppUpdateContactAddress_FA	PegaIns-Work-ManageCustomerAc
Section	AttachFile	PegaIns-Work
Data Transform	BasicCommIProperty	PegaIns-Data-PolCmp-CoverageComponent
Data Transform	BasicCommIProperty_LOB	PegaIns-Data-PolCmp-CoverageComponent
Section	BasicCustomerInfo	PegaIns-Data-Party-Person
Activity	BasicDemographicInformation	PegaIns-Data-PolCmp-InsuredLife
Activity	BasicRiderInformation	PegaIns-Data-PolCmp-InsuredLife

Rule Type	Rule Name	Applies To
Activity	BindPolicy	PegaIns-Work
Activity	BindPolicy	PegaIns-Work-Application
Activity	BindPolicy	PegaIns-Work-ChgPolicy
Activity	BroadcastNews	PegaIns-Data-Portal
Activity	BrowseSampleAccounts	PegaIns-Data-PolCmp-Customer
Activity	BrowseSampleCustomer	PegaIns-Data-PolCmp-Customer
Activity	BuildAgentProfile	PegaIns-Data-AgentProfile
Section	BUList	PegaIns-Work
Data Transform	BusinessUnitMapper	Code-Pega-List
Flow	BusinessUnitOnlySearch	PegaIns-Work-Application
Validate	CACheckUpdateBusinessDetails	PegaIns-Interface-BusinessUnit
Section	CAEnterCommOptions	PegaIns-Interface-Contact
Section	CAEnterContactAddress	PegaIns-Work

Rule Type	Rule Name	Applies To
Section	CAEnterContactCommOptions	PegaIns-Work
Flow Action	CAEnterContactCommOptions	PegaIns-Work
Section	CAEnterCustomerAddress	PegaIns-Work
Activity	CalculateActualPaymentAmount	PegaIns-Data-Payments
Activity	CalculateBodilyInjuryPrice	PegaIns-Data-PolCmp-AutoCoverage
Activity	CalculateClassificationCodePrice	PegaIns-Data-PolCmp-RatingInform WC
Activity	CalculateCollisionPrice	PegaIns-Data-PolCmp-AutoCoverage
Activity	CalculateCommercialAutoTypePrice	PegaIns-Data-PolCmp-AutoCoverage
Activity	CalculateContentPrice	PegaIns-Data-PolCmp-InsuredItem
Activity	CalculateDamageToOthersPropertyPrice	PegaIns-Data-PolCmp-AutoCoverage
Section	CalculatedValues	@baseclass
Activity	CalculateLimitedCollisionPrice	PegaIns-Data-PolCmp-AutoCoverage
Activity	CalculateMedicalPaymentsPrice	PegaIns-Data-PolCmp-AutoCoverage

Rule Type	Rule Name	Applies To
Activity	CalculatePaymentByFrequency	PegaIns-Work
Activity	CalculatePerAccidentPrice	PegaIns-Data-PolCmp-AutoCoverage
Activity	CalculatePersInjProtPrice	PegaIns-Data-PolCmp-AutoCoverage
Section	CalculatePremiumCalculatorWrapper	PegaIns-Data-Quote
Activity	CalculatePrice	PegaIns-Data-PolCmp-
Activity	CalculatePrice	PegaIns-Data-PolCmp-InsuredBuild
Activity	CalculatePrice	PegaIns-Data-PolCmp-InsuredItem
Activity	CalculatePrice	PegaIns-Data-PolCmp-Liability
Activity	CalculateRatingStatePrice	PegaIns-Data-PolCmp-RatingState
When	CalledFromActionDisplay	PegaIns-CSB-Work
Deprecated: List View	CANamedContactResults ALL	PegaIns-Interface-Contact
Activity	CancelApplication	PegaIns-Data-PolCmp-Party-Person Insured
Section	CancelEndorsement	PegaIns-Work-ChgPolicy

Rule Type	Rule Name	Applies To
When	CanDeleteEndorsement	PegaIns-
Section	CANewContact	PegaIns-Work
Activity	CANewContact	PegaIns-Work
Harness	CAPerform	PegaIns-Work
Activity	CASaveContactAddresses	PegaIns-Work
Activity	CASaveContactCommOptions	PegaIns-Work
Section	CASelectBU	PegaIns-Work
Section	CASelectContact	PegaIns-Work
Flow Action	CASelectContact	PegaIns-Work
Section	CASelectContactbyBU	PegaIns-Work
Flow Action	CASelectContactByPolicyID	PegaIns-Work
Control	CAUpdateContactAddressScripts	
Activity	CAViewPolicy	PegaIns-Interface-InsurancePolicy

Rule Type	Rule Name	Applies To
Activity	CAViewPolicyForContact	PegaIns-Interface-InsurancePolicy
Circumstance Template	Channel	PegaIns-Work
Circumstance Template	ChannelID	PegaIns-Work
Validate	CheckForAdditionalInformation	PegaIns-Data-PolCmp-InsuredCommercialPropertyLocati
Activity	CheckIfContactIsDuplicate	PegaIns-Work
Activity	CheckIfWhenRuleExists	@baseclass
Activity	CheckVehicleData	PegaIns-Data-ClaimCmp-VehicleInvolvedInClaim-Pers
When	ClaimAmtGtZero	PegaIns-
When	ClaimAmtGtZero	PegaIns-Data-
Flow	ClaimAnalysis	PegaIns-CSB-Work-ClaimUnit-
Section	ClaimInquiryInfo	PegaIns-CSB-Work
When	ClaimResolved	@baseclass
Portal	ClaimsRep	



Rule Type	Rule Name	Applies To
Activity	CleanSelectedRepairAmount	PegaIns-Data-ClaimCmp- RepairTransactionInformation
Activity	CleanUpSearchInfo	PegaIns-Work
Activity	ClearContactID	PegaIns-Work
When	ClearEmergencyNoticeData	PegaIns-Data-ClaimCmp-Notice-Au
Activity	ClearEventExposureCode	PegaIns-Data-ClaimCmp- WorkersCompLossOccurrence
Activity	ClearInjuryIllnessCodes	PegaIns-Data-ClaimCmp-Personal
Activity	ClearSearchPages	PegaIns-Work
Activity	ClearSearchValues	PegaIns-Work
Activity	ClearSubComponentAdjPrice	@baseclass
Activity	CloseClaim	PegaIns-CSB-Work
Activity	CloseClaimFile	PegaIns-CSB-Work-ClaimFile
Activity	CloseThisWindow	PegaIns-CSB-Work
Flow	CollectApplicationDetails	PegaIns-Data-Application-Grp

Rule Type	Rule Name	Applies To
Flow Action	CollectCustomerInformation	PegaIns-Work
Flow	CollectData	PegaIns-Data-PolCmp-Party-Person Insured
Section	CollectGeneralInformation	PegaIns-Data-Submission-Com
Flow Action	CollectGeneralInformation	PegaIns-Data-Submission-Com
Flow	CollectInsuredInfoLoop	PegaIns-Data-PolCmp-Party-Person Insured
Section	CollectNeedsInformationInstructions	PegaIns-Data-Submission-Life
Section	CollectPersonalInfoQuickQuoteTermLife	PegaIns-Data-Party-
Section	CollectPropertyLocations	PegaIns-Data-Application-Comm-P
Section	CombineFinalCoverage	PegaIns-Data-PolCmp-Coverage-
Data Transform	CommIPropertyBasic	PegaIns-Data-PolCmp-CoverageComponent
Data Transform	CommIPropertyCoveragesBackup	PegaIns-Data-PolCmp-CoverageComponent
Data Transform	CommIPropertyCoveragesBasic	PegaIns-Data-PolCmp-CoverageComponent
Data Transform	CommIPropertyCoveragesSpecialBlanket	PegaIns-Data-PolCmp-CoverageComponent

Rule Type	Rule Name	Applies To
Data Transform	CommlPropertyCoveragesSpecialBlanket_pabsysad min	PegaIns-Data-PolCmp-CoverageComponent
Data Transform	CommlPropertyPremium	PegaIns-Data-PolCmp-CoverageComponent
Property	CommunicationOptions	PegaIns-Data-Party-
Section	ComponentEntry	PegaIns-Data-PolCmp-IncomeRisk
Section	ContactEmailSocialMediaList	PegaIns-Data-CustomerAccount
Activity	ContactNotSelected	PegaIns-Interface-CustomerAccount
Section	ContactPhoneFaxList	PegaIns-Data-CustomerAccount
Property	ContactPhoneNumber	PegaIns-Data-Party-Org-
Property	ContactPhoneNumber_satish1	PegaIns-Data-Party-
Flow	ContactSearch	PegaIns-Work-Application
Activity	ContactSelected	PegaIns-Interface-CustomerAccount
Activity	ConvertPCFProduct	PegaIns-Data-PolCmp-Product-
Activity	CopyBusinessAccountInfo	PegaIns-Work

Rule Type	Rule Name	Applies To
Activity	CopyCollectCustomerInfo	PegaIns-Work
Activity	CopyCustomerAccountDetails	PegaIns-Work-ManageCustomerAc
Activity	CopyCustomerAccountDetailsFrmSearch	PegaIns-Work-ManageCustomerAc
Activity	CopyEachRatingState	PegaIns-Data-PolCmp-RatingState
Activity	CopyFromPaymentsList	PegaIns-Data-ClaimCmp- RepairTransactionInformation
Activity	CopyPolicyholder_backup	PegaIns-Work
Activity	CopyRatingState	PegaIns-Work-Application
Activity	CopyRatingStateToEachLocation	PegaIns-Data-PolCmp- InsuredCommercialPropertyLocati
Activity	CopyStateToEachCoverage	PegaIns-Data-PolCmp-InsuredVehi
Activity	CopyStateToEachVehicle	PegaIns-Data-PolCmp- InsuredPropertyLocation
Activity	CopyToResolvedQuotes	PegaIns-Data-PolCmp-Quote
HTML Fragment	CorrMultiplesHeaderBar	
Property	CountyName	PegaIns-Data-Address-

Rule Type	Rule Name	Applies To
Flow Action	CoverageAmountDisplay	PegaIns-Data-Submission-Life
Activity	CoverageChangeIG	PegaIns-Data-PolCmp-ProductList
Data Transform	CoverageDeductibleListA	PegaIns-Data-PolCmp-
When	CoveragesSelected	PegaIns-Data-PolCmp-Coverage-
Data Transform	CPMClearRemoveCommOptionForPhone	PegaIns-Work-ManageCustomerAc
Section	CPMEmailAndSocialMediaOptions	PegaIns-Work-ManageCustomerAc
Report Definition	CPMGetBUBByAgentId	PegaIns-Interface-BusinessUnit
Report Definition	CPMGetContactByPolicy	PegaIns-Interface-InsurancePolicy
Section	CPMProfileInfo	PegaIns-Data-Party-Org-Company
Report Definition	CPMListContactsForPolicy	PegaIns-Interface-Contact
Section	CPMLOBIcon	PegaIns-
Data Transform	CPMMarkContactEmailForDeletion	PegaIns-Work-ManageCustomerAc
Data Transform	CPMMarkContactPhoneForDeletion	PegaIns-Work-ManageCustomerAc

Rule Type	Rule Name	Applies To
Data Transform	CPMMarkContactVideoForDeletion	PegaIns-Work-ManageCustomerAc
Section	CPMPhoneAndFaxOptions	PegaIns-Work-ManageCustomerAc
Report Definition	CPMPolicyByBUID	PegaIns-Interface-BusinessUnit
Section	CPMVideoOptions	PegaIns-Work-ManageCustomerAc
Activity	crazy	PegaIns-Work
Data Transform	CreateAgentParty	PegaIns-Work
Activity	CreateApplication	PegaIns-Work-Application
Activity	CreateBUAccount	PegaIns-Work
Activity	CreateContact	PegaIns-
Activity	CreateCustomerAccountAndMCAForContact	PegaIns-
Activity	CreateCustomerContact	PegaIns-
Activity	CreateCvgList	PegaIns-Data-PolCmp-CoverageComponent
Activity	CreateDedList	PegaIns-Data-PolCmp-CoverageComponent

Rule Type	Rule Name	Applies To
Activity	CreateEmailPostProcessing	PegaIns-Work
Section	CreateEmailUI	PegaIns-Data-EmailInquiries
Activity	CreateGrid	PegaIns-Data-PolCmp-Coverage-
Activity	CreateManageCustomerAccountBU	PegaIns-Interface-CustomerAccount
Activity	CreateManageCustomerAccountForExistingCustomers	PegaIns-Interface-CustomerAccount
Activity	CreateNewEmptyPolicy	PegaIns-Interface-InsurancePolicy
Activity	CreatePartyForInsuredRole	PegaIns-Work
Activity	CreatePartyForSelectedRole	PegaIns-Work
Activity	CreateWorkFromSearch	PegaIns-
When	CurrentPolicyExists	PegaIns-Data-InsurancePolicy
Flow	CustomerAccountSearch	PegaIns-Work
Data Transform	CustomerAddressMapper	PegaIns-Data-Address-
Data Transform	CustomerAddressMapper1	Code-Pega-List

Rule Type	Rule Name	Applies To
Section	CustomerAppContactMarketingPrefs	PegaIns-Data-CustomerAccount
Data Transform	CustomerCommOptionsMapper	Code-Pega-List
Section	CustomerContactBUReport	PegaIns-Data-Party-Org-Company
Flow	CustomerDataEntry	PegaIns-Work
Activity	CustomerDataMove	PegaIns-Data-PolCmp-Customer
When	CustomerIsBeneficiary	PegaIns-Data-PolCmp-Customer
When	CustomerIsInsured	PegaIns-Data-PolCmp-Customer
When	CustomerIsPolicyHolder	PegaIns-Data-PolCmp-Customer
Data Page	D_AlternateStages	PegaIns-
Deprecated: List View	DataTableClassEditor ALL	PegaIns-Data-MajorOccupations
Deprecated: List View	DataTableClassEditor ALL	PegaIns-Interface-Agent
Property	DateSummonsServed	PegaIns-Data-Litigation
Data Page	D_BusinessUnitContact	PegaApp-Interface-BusinessUnit



Rule Type	Rule Name	Applies To
Data Page	Declare_BusinessUnitLinks	Code-Pega-List
When	DeductibleHasValue	PegaIns-CSB-Work-ClaimUnit-
Activity	DefaultProductData	PegaIns-Work-Application-Pers-Automotive
Activity	DefaultValues	PegaIns-Data-PolCmp-Coverage-
Activity	DeletePolicy	PegaIns-Data-InsurancePolicy
Activity	DetermineCurrencyRates	PegaIns-
Declare Expression	.DifferenceTotal	PegaIns-Data-PolicyLoan
When	DisablePayments	@baseclass
When	DiscountAndPayments	PegaIns-Data-PolCmp-Payment
When	DiscountGridExists	PegaIns-Data-PolCmp-Payment
Section	DiseaseDetails	PegaIns-Data-ClaimCmp-WorkersCompLossOccurrence
Section	DispCompletedOperations	PegaIns-Data-Application
Section	DispGeneralInformation	PegaIns-Data-Application

Rule Type	Rule Name	Applies To
Section	DisplayAllCoverages	PegaIns-Data-PolCmp-InsuredVehi
Section	DisplayCustomerInfo	PegaIns-Data-Party-Person
Data Page	D_NamedDriverList	PegaIns-Work-ManageCustomerAc NamedDriver
Activity	DoNothing	PegaIns-
Activity	DownloadLocationDetailsTemplate	PegaIns-Data-Submission-Com
Activity	DPLoadAddressesByContact	Code-Pega-List
Section	DriverDisplay	PegaIns-Data-CustomerAccount
Section	DriverInjuryInformation	PegaIns-Data-ClaimCmp- VehicleInvolvedInClaim
Activity	DriverVehicles	PegaIns-Data-PolCmp-NamedDrive
Function Alias	DurationFromDateToDate	PegaIns-Work
Flow Action	EditPropertyOwnerDetails	PegaIns-Data-ClaimCmp-PropertyD
Flow Action	EditTerms	PegaIns-Data-PolCmp- TermsAndConditions
When	EligibleForInsurance	PegaIns-Data-InsurancePolicy- Commercial-

Rule Type	Rule Name	Applies To
When	EligibleForInsurance	PegaIns-Data-InsurancePolicy-Indiv
When	EligibleForInsurance	PegaIns-Data-InsurancePolicy-Pers
When	EligibleForInsurance	PegaIns-Data-InsurancePolicy-Pers Automotive
Flow Action	EligibleIndustriesSelection	PegaIns-Data-Eligibility
Section	EmailDisplay	PegaIns-Data-CustomerAccount
Section	EmployeeBenefits	PegaIns-Data-Application-Comm-G
When	EnablesSettlementPayment	PegaIns-Data-ClaimUnit
Flow	EnterApplicationData	PegaIns-Work-Application
Flow	EnterEndorsementData	PegaIns-Work-ChgPolicy
When	ExistingNamedDriver	PegaIns-Data-PolCmp-NamedDrive
When	ExistingNamedInsured	PegaIns-Data-PolCmp-NamedInsur
Activity	ExpandInsClassExplorer	Rule-Obj-Class
Activity	ExpandInsPropertiesExplorer	Rule-Obj-Property

Rule Type	Rule Name	Applies To
Activity	ExportAssetsToExcel	PegaIns-Data-Submission-Com
Activity	ExportBulkUploadProcessingErrors	PegaIns-
Property	FeeAmount	PegaIns-Work
Activity	FetchCoverageCodes	PegaIns-Data-InsurancePolicy-Commercial-Property
Report Definition	FetchNamedDrivers	PegaIns-Interface-CustomerAccount
Activity	Figure_Exposure	PegaIns-
Activity	Figure_Instance_Exposure	PegaIns-
Activity	Figure_SubComponent_Exposure	PegaIns-
When	FilterByDataType	PegaIns-Data-PolCmp-Underwriting
When	FilterByDivisionCode	PegaIns-Data-BodyPartsMajor
When	FilterByDivisionCode	PegaIns-Data-EventExposureMajor
When	FilterByDivisionMajorCode	PegaIns-Data-BodyPartsMinor
When	FilterByDivisionMajorCode	PegaIns-Data-EventExposureMinor

Rule Type	Rule Name	Applies To
When	FilterByDivisionMajorMinorCode	PegaIns-Data-BodyPartsSub
When	FilterByDivisionMajorMinorCode	PegaIns-Data-EventExposureSub
When	FilterByMajorOccupation	PegaIns-Data-MinorOccupations
When	FilterByMinorOccupation	PegaIns-Data-BroadOccupations
When	FilterBySICCode	PegaIns-Data-SICFactor
When	FilterCoverageDuration	PegaIns-Data-TermPrices
When	FilterCoverageOrderRange	PegaIns-Data-TermLimits
When	FilterDurationOrderRange	PegaIns-Data-TermLimits
Activity	FilteredAttorneyList	PegaIns-Data-Attorney
Activity	FilteredVendorList	PegaIns-Data-Vendor
When	FilterLimitName	PegaIns-Data-TermLimits
When	FilterLimitNameAmount	PegaIns-Data-TermLimits
When	FilterPriceKey	PegaIns-Data-TermPrices

Rule Type	Rule Name	Applies To
When	FilterPrices	PegaIns-Data-TermPrices
Decision Tree	FinalEligibilityCheck	PegaIns-Data-InsurancePolicy-Pers Automotive
Flow Action	FindPolicyByID	PegaIns-Work
Activity	FinishClaimInquiry	PegaIns-Work
Deprecated: List View	FNOLByLastName ALL	PegaIns-CSB-Work
Harness	FNOLReviewPopup	PegaIns-CSB-Work
Section	FNOLReviewPopup	PegaIns-CSB-Work
Declare Index	FraudCheckResults	PegaIns-CSB-Work-ClaimUnit-
Activity	FW_ClassTree_1	Rule-Obj-Class
Activity	FW_ClassTree_2	Rule-Obj-Class
Activity	FW_DeleteClass	Rule-Obj-Class
Section	GeneralPartyDisplay	PegaIns-Data-Party-Org-Company
Activity	GenerateAgentProfile	PegaIns-Data-AgentProfile

Rule Type	Rule Name	Applies To
Activity	GetActiveDriver	PegaIns-Interface-CustomerAccount
Activity	GetActiveInsured	PegaIns-Interface-CustomerAccount
Report Definition	GetAgencyCodeByContact	PegaIns-Interface-CustomerAgency
Activity	GetAgencyData	PegaIns-Data-Party-Org-Agency
Activity	GetApplicationData	PegaIns-Work-Application
Activity	GetBodyPartsDivision	Code-Pega-List
Activity	GetBodyPartsDivision	PegaIns-Data-BodyPartsDivision
Activity	GetBodyPartsMajor	Code-Pega-List
Activity	GetBodyPartsMajor	PegaIns-Data-BodyPartsMajor
Activity	GetBodyPartsMinor	Code-Pega-List
Activity	GetBodyPartsMinor	PegaIns-Data-BodyPartsMinor
Activity	GetBodyPartsSub	Code-Pega-List
Activity	GetBodyPartsSub	PegaIns-Data-BodyPartsSub

Rule Type	Rule Name	Applies To
Activity	GetBuildings	PegaIns-Data-PolCmp-InsuredCommercialPropertyLocati
Flow	GetBusinessUnitCA	PegaIns-Work
Activity	GetCAForBU	Embed-ListParams
Activity	GetCAForBU	PegaIns-Work
Activity	getCAForBUContact	Embed-ListParams
Activity	getCAForContact	Embed-ListParams
Activity	getClaimPayments	Embed-ListParams
Activity	GetClaimsFlowActionsList	@baseclass
Activity	GetColumnHeaderMappping	PegaIns-
Activity	GetCommOpts	PegaIns-Data-CustomerAccount
Flow	GetContactCA	PegaIns-Work
Activity	GetContactForBU	Embed-ListParams
Report Definition	GetContactInfo	PegaIns-Interface-Contact



Rule Type	Rule Name	Applies To
Activity	GetContactInformation	PegaIns-Data-Customer
Activity	getContentApplications	Embed-ListParams
Activity	getContentPoliciesForAgency	Embed-DrillDownParams
Activity	getContentPoliciesForPolicyholder	Embed-ListParams
Activity	getContentPoliciesForPolicyholder_Date	Embed-ListParams
Activity	getContentPoliciesForPolicyholder_Date_PolicyType	Embed-ListParams
Activity	getCountryCodes	Data-Address
Activity	GetCUDetails	PegaIns-Data-Payments
Activity	getCurrencyRates	PegaIns-
Activity	GetCustomerAccountForCaller	PegaIns-Work
Section	getCustomerProfileDetails	PegaIns-Data-CustomerProfile
Section	getCustomerProfileDetails_rikek	PegaIns-Data-CustomerProfile
Activity	getDetailedOccupation	PegaIns-Data-DetailedOccupation

Rule Type	Rule Name	Applies To
Activity	GetDriverAgeCategory	PegaIns-Data-PolCmp-NamedDrive
Activity	GetDriverRecordCategory	PegaIns-Data-PolCmp-NamedDrive
Activity	GetEmailsList	Embed-ListParams
Activity	GetEventExposureDivision	PegaIns-Data-EventExposureDivisi
Activity	GetEventExposureMinor	Code-Pega-List
Activity	GetImage	PegaIns-Work-ManageCustomerAc
Activity	getInjuryCode	Code-Pega-List
Activity	getInjuryCode	PegaIns-Data-InjuryCode
Activity	getInjuryDivision	Code-Pega-List
Activity	getInjuryDivision	PegaIns-Data-InjuryDivision
Activity	getInjuryMinorCodes	Code-Pega-List
Activity	getInjuryMinorCodes	PegaIns-Data-InjuryMinorCode
Activity	getInjurySubCodes	Code-Pega-List

Rule Type	Rule Name	Applies To
Activity	getInjurySubCodes	PegaIns-Data-InjurySubCode
Activity	GetLimit	PegaIns-Data-PolCmp-PremiumGri
Activity	GetLinkedBUS	PegaIns-
Activity	getLitigationPayments	Embed-ListParams
Activity	GetLOBForCustomerType	PegaIns-Work-Application
Activity	GetLocalizedReasonsForClaimFile	@baseclass
Activity	GetLocalizedReasonsForClaimUnit	@baseclass
Activity	GetLocalizedReasonsForDisablingMakePayment	@baseclass
Activity	GetLocalizedReasonsForDisablingMakePayment_rrt est	@baseclass
Activity	GetLocationsList	Embed-ListParams
Activity	getMakes	PegaIns-Data-Make
Activity	getMinorOccupations	Code-Pega-List
Activity	getMinorOccupations	PegaIns-Data-MinorOccupations

Rule Type	Rule Name	Applies To
Activity	getModels	PegaIns-Data-Model
Activity	GetNamedDriversList	Embed-ListParams
Activity	GetNamedInsuredsList	Embed-ListParams
Activity	GetOpenApplications	PegaIns-Work-Application
Activity	GetPaymentCodes	PegaIns-Data-PaymentCodes
Activity	GetPaymentCodes	PegaIns-Data-Payments
Activity	GetPaymentCodesForAutoPay	PegaIns-Data-PaymentCodes
Activity	GetPoliciesForPartyByDateAndPolicyType	PegaIns-Interface-InsurancePolicy
Activity	GetPoliciesForPolicyholder	PegaIns-Interface-InsurancePolicy
Activity	GetPoliciesForPolicyholderAndAuthorizedParty	PegaIns-Interface-InsurancePolicy
Activity	GetPoliciesForPolicyholderByDate	PegaIns-Interface-InsurancePolicy
Activity	GetPoliciesList	Embed-ListParams
Activity	GetPoliciesList	PegaIns-Work-ManageCustomerAc

Rule Type	Rule Name	Applies To
Activity	GetPoliciesListByAgency	Embed-ListParams
Activity	GetPolicyDetailsByID	PegaIns-Interface-InsurancePolicy
Report Definition	GetPolicyListForCaller	PegaIns-Interface-InsurancePolicy
Activity	GetPremium	PegaIns-Data-PolCmp-Coverage-
Activity	GetPremium	PegaIns-Data-PolCmp-Coverage-Ba
Activity	GetRecentContactDetails	PegaIns-Data-CustomerAccount
Activity	GetReservesForGridDisplay	PegaIns-CSB-Work-ClaimUnit-
Activity	GetReservesForGridDisplay	PegaIns-Data-ClaimUnit
Activity	GetRoleTypeByRoleDescription	Data-Party
Activity	getScheduledPayments	Embed-ListParams
Activity	getScheduledPaymentsforClaimFile	Embed-ListParams
Activity	GetSICCodeFromReq	PegaIns-Work-ManageCustomerAc UnderwritingData
Activity	GetSICDivision	PegaIns-Data-SICDivision

Rule Type	Rule Name	Applies To
Activity	GetSICFactor	PegaIns-Data-SICFactor
Activity	GetSICGroup	PegaIns-Data-SICGroup
Activity	GetStateList	PegaIns-Work-Application
Activity	getSubroPayments	Embed-ListParams
Activity	GetTelephonesList	Embed-ListParams
Activity	GetUnderwritingData	Embed-ListParams
Activity	GetUnresolvedClaimFromCover	PegaIns-CSB-Work
Activity	getUWDHistorySmartInfo	PegaIns-Interface-UnderwritingData
Activity	GetVehicleModels	PegaIns-Work-Application
Activity	GetVehiclesMake	PegaIns-Work-Application
Activity	GetVendorList	PegaIns-Data-Vendor
Activity	getVendorPayments	Embed-ListParams
Activity	GetWebSitesList	Embed-ListParams

Rule Type	Rule Name	Applies To
When	GotPolicyData	PegaIns-Work
When	HasAdjusterPrivilege	Embed-PegaEPRO-FlowPage
When	hasDefense	PegaIns-Data-ClaimUnit
When	HasMorePayments	PegaIns-CSB-Work
When	HasMorePayments	PegaIns-Data-ClaimUnit
When	hasPlaintiff	PegaIns-Data-ClaimUnit
When	HasProductsSelected	PegaIns-Data-PolCmp-Party-Person Insured
When	HasUnderwritingStatus	PegaIns-Work-ManageCustomerAc
When	HaveSecurityManager	@baseclass
Section	HeaderImage	PegaIns-Work-ManageCustomerAc
Section	HospitalDisplay	PegaIns-Data-Party-Org-
Activity	HTMLSelectOptionStream	PegaIns-Data-CodeTable
Report Definition	IBULinks	PegaIns-Interface-BusinessUnitLink

Rule Type	Rule Name	Applies To
Flow	IdentifyCaller	PegaIns-Work
When	IIFAccessGroups	Data-Admin-Operator-AccessGroup
Flow	IIFAddBUContact	PegaIns-Work
Flow	IIFAppContactSearch	PegaIns-Work
Flow	IIFAppGetBusinessUnitOnly	PegaIns-Work
Activity	IIFAppGetCallerDetails	PegaIns-Work
Activity	IIFAppGetContactDetails	PegaIns-Work
When	IIFApplicantPartyExists	PegaIns-
HTML	IIFBUDetails	PegaIns-Work
Activity	IIFBUIDOrBUName	PegaIns-Work
Activity	IIFBUIDOrBUNameFromSearch	PegaIns-
Validate	IIFCheckContactAddress	PegaIns-Work
Deprecated: List View	IIFContactResultsForBU ALL	PegaIns-Interface-Contact



Rule Type	Rule Name	Applies To
Activity	IIFCreateBusinessUnitParty	PegaIns-Work
Activity	IIFCreateBusinessUnitParty_test	PegaIns-Work
When	IIFCustomerPartyExists	PegaIns-
HTML	lifFindAccount	PegaIns-Work
Control	IIFFindAssociatedAccountsText	
Flow Action	IIFFindBUCaller	PegaIns-Work
Flow Action	IIFFindCaller	PegaIns-Work
HTML	IIFFindCaller	PegaIns-Work
Flow	IIFGetCaller	PegaIns-Work
Flow	IIFGetCustomer	PegaIns-Work
Flow Action	IIFListBUDetails	PegaIns-Work
Activity	lifMapAgentDetails	PegaIns-Data-Party-Person
Activity	IIFMapBusinessunitPartyDetails	PegaIns-Work

Rule Type	Rule Name	Applies To
Activity	IIFMapContactBULinkType	PegaIns-Work
Harness	IIFMgrCalendar	PegaIns-Data-Portal
Section	IIFMgrCalendar	PegaIns-Data-Portal
Harness	IIFMgrDashboard	PegaIns-Data-Portal
Harness	IIFMgrHome	PegaIns-Data-Portal
Harness	IIFMgrReports	PegaIns-Data-Portal
Activity	IIFNextGenGetContactDetails	PegaIns-
Activity	IIFNextGenGetContactDetails	PegaIns-Work
When	IIFNoBusinessUnitPartyExists	PegaIns-
When	IIFNoBusinessUnitPartyExists_bkup	PegaIns-
When	IIFNotBusinessCustomer	PegaIns-
When	IIFOriginatorPartyExists	PegaIns-
When	IIFOwnerPartyExists	PegaIns-

Rule Type	Rule Name	Applies To
When	IIFPolicyholderPartyExists	PegaIns-
Activity	IIFQuestionnaireSetup	PegaIns-Work
Activity	IIFReadContactListByPolicy	PegaIns-Interface-Contact
Activity	IIFReadContactListByPolicy	PegaIns-Work
Activity	IIFSaveContactAddresses	PegaIns-Work
Activity	IIFSaveContactName	PegaIns-Work
Activity	IIFSaveContactProfile	PegaIns-Interface-Contact
Activity	IIFSaveNewAddressTypeForContact	PegaIns-Interface-Contact
Activity	IIFSaveNewCommOptsTypeForContact	PegaIns-Interface-Contact
Section	IIFSelectCaller	PegaIns-Work
Flow Action	IIFSelectCaller	PegaIns-Work
Section	IIFSelectNamedContact	PegaIns-Work-ManageCustomerAc
Flow Action	IIFSelectNamedContact	PegaIns-Work-ManageCustomerAc

Rule Type	Rule Name	Applies To
Activity	IIFShowPolicyAndPolicyholder	PegaIns-Work
Portal	IIFUnderwriter	
Portal	IifWorkManager	
Section	ImageWrapper	PegaIns-Work-ManageCustomerAc
Activity	ImportExcelFileExtension	PegaIns-
Flow Action	IncomeDetails	PegaIns-Data-Submission-Life
When	IndividualClass	Rule-Obj-Class
Activity	InitializeDataForNewPolicy	PegaIns-Work-Application
Activity	InitializeDatesForBU	PegaIns-Work
Activity	InitializeNewPolicyData	PegaIns-Work-Application
Activity	InitializePaymentDefaults	PegaIns-CSB-Work
Activity	InitializePaymentDefaultsForAutoPay	PegaIns-CSB-Work
Activity	InitializeProduct	PegaIns-Work-Application

Rule Type	Rule Name	Applies To
Activity	InitializeTransEffDate	PegaIns-Work-ChgPolicy
Activity	InitiatePayments	@baseclass
Flow	InitiateResearch	PegaIns-Work-Research
Activity	InitiateSICWizard	PegaIns-Work
Activity	InitPickProductDetails	PegaIns-Work
Activity	InitPickProductDetails	PegaIns-Work-ChgPolicy
When	InjuryByPremises	PegaIns-Data-ClaimCmp-Notice-GeneralLiability
When	InjuryByProductLoss	PegaIns-Data-ClaimCmp-Notice-GeneralLiability
When	InjuryCodeFilterByDivision	PegaIns-Data-InjuryCode
Activity	InjuryDescription	PegaIns-Data-ClaimCmp-Investigat
When	InjuryMinorCodeFilterByMajorCode	PegaIns-Data-InjuryMinorCode
When	InjurySubCodeFilterByMinorCode	PegaIns-Data-InjurySubCode
When	InPolicyDataConfirmation	PegaIns-Data-InsurancePolicy-Commercial-WC

Rule Type	Rule Name	Applies To
Report Definition	InsClasses	Rule-Obj-Class
When	InsCoGroups	Data-Admin-Operator-AccessGroup
Report Definition	InsDataClasses	Rule-Obj-Class
Activity	InsDialogWorkBasket	PegaIns-Work
Activity	InsNewAddressForContact	PegaIns-Work-Contact
Activity	InsNewCommOptionForContact	PegaIns-Work-Contact
Activity	InsNewContact	PegaIns-Work-Contact
Report Definition	InsProperties	Rule-Obj-Class
Report Definition	InsProperties	Rule-Obj-Property
Report Definition	InsPropertiesDetail	Rule-Obj-Class
Report Definition	InsPropertiesDetail	Rule-Obj-Property
When	InsuredAccepted	PegaIns-CSB-Work-Subrogation
Section	InsuredVehicleDamageInformation	PegaIns-Data-ClaimCmp-VehicleInvolvedInClaim

Rule Type	Rule Name	Applies To
Section	InsuredVehicleDisposition	PegaIns-Data-ClaimCmp-VehicleInvolvedInClaim
Flow	IntakeAgencyInformation	PegaIns-Data-Party-Org-Agency
Declare Expression	.InterestRate	PegaIns-Data-PolicyLoan
Declare Expression	.InterestTotal	PegaIns-Data-PolicyLoan
When	IsBankAccount	PegaIns-Data-PolCmp-Payment
When	IsBodilyInjury	PegaIns-Data-ClaimUnit
When	IsBUSelected	PegaIns-Work
When	IsBusinessUnit	PegaIns-Data-Party-
When	IsClaimantNotSameAsPH	Data-Party
When	IsCollisionCU	PegaIns-Data-ClaimCmp-VehicleInvolvedInClaim
When	IsComprehensiveCU	PegaIns-Data-ClaimCmp-VehicleInvolvedInClaim
Function Alias	IsConvertible	PegaIns-Data-PolCmp-InsuredVehi
When	IsCustomer	PegaIns-Data-PolCmp-InsuredLife

Rule Type	Rule Name	Applies To
When	IsCustomer	PegaIns-Data-PolCmp-Party-Person Policyholder
When	IsEligible	PegaIns-Work
When	IsFWW001	PegaIns-Interface-
When	IsHighRisk	PegaIns-Data-PolCmp-InsuredVehi
When	IsIIF	Data-Admin-Organization
When	IsIIF	Data-Admin-OrgDivision
When	IsIIF	Data-Admin-OrgUnit
When	IsIndemnity	PegaIns-Data-PaymentCodes
When	IsInsuranceCPM	PegaIns-
When	IsLowRisk	PegaIns-Data-PolCmp-InsuredVehi
When	IsLuxuryCar	PegaIns-Data-PolCmp-AutoCoverag
When	IsModerateRisk	PegaIns-Data-PolCmp-InsuredVehi
When	IsModifiedComparativeNeg50Applicable	PegaIns-Data-Payments



Rule Type	Rule Name	Applies To
When	IsModifiedComparativeNeg51Applicable	PegaIns-Data-Payments
When	IsMortgage	PegaIns-Work
When	IsNamedDriver	PegaIns-Work-ManageCustomerAc
When	isNewPCF	PegaIns-Work-ManageCustomerAc
When	IsNotABusinessCustomer	@baseclass
When	IsNotGirl	PegaIns-Data-InsurancePolicy-Pers Automotive
When	IsNotGirl	PegaIns-Data-PolCmp-
When	IsNoticeDataUpdated	PegaIns-CSB-Work
When	IsNOTInsuranceCPM	PegaIns-Work
When	IsOfCard	PegaIns-Data-PolCmp-Payment
When	IsOtherInsurance	PegaIns-Data-ClaimCmp-Notice- GeneralLiability
When	IsPaymentInProgress	@baseclass
When	IsPDLCUSelected	PegaIns-CSB-Work-Subrogation

Rule Type	Rule Name	Applies To
When	IsPegaInsure	PegaIns-
When	IsPolicyCorrectClass	PegaIns-Data-InsurancePolicy
When	IsPolicyholderBeneficiary	PegaIns-Data-PolCmp-Customer
When	IsPureComparativeNegligence	PegaIns-Data-Payments
When	IsPureContributoryNegApplicable	PegaIns-Data-Payments
When	IsScheduleRatingNonEmpty	PegaIns-Data-
When	IsSelected	PegaIns-Data-PolCmp-ProductList
When	IsSubmissionPageExists	PegaIns-Data-InsurancePolicy
Activity	IssuePolicy	PegaIns-Work-ChgPolicy
When	IsUnderwritingWork	PegaIns-
When	IsVarUnivLife	PegaIns-Data-PolCmp-InsuredLife
When	IsWorkersComp	PegaIns-Data-ClaimUnit
When	LegalSpecialityFilterMatch	PegaIns-Data-Attorney

Rule Type	Rule Name	Applies To
Flow Action	LiabilitiesAndAssets	PegaIns-Data-Submission-Life
When	LicenseStateMatch	PegaIns-Data-Attorney
When	LimitsInputMode	@baseclass
Activity	LinkAgencyInfo_Todo	PegaIns-Data-Party-Org-Agency
Activity	LinkContactWithBU	PegaIns-
Activity	LinkInsuredWithContact	PegaIns-
Activity	LoadProductOptionsByMarketSegment	Code-Pega-List
Data Transform	LoadSelectedQuote	PegaIns-Data-Application-Life
Declare Expression	.LoanValuesTotal	PegaIns-Data-PolicyLoan
When	LOBIsIndividual	PegaIns-Data-Party-
When	LOBIsIndividual	PegaIns-Work
Section	LocationDisplay	PegaIns-Data-CustomerAccount
Activity	LocationPricePlusSumOfSubcomponentPrices	PegaIns-Data-PolCmp-InsuredPropertyLocation

Rule Type	Rule Name	Applies To
When	LossByOperations	PegaIns-Data-ClaimCmp-Notice-GeneralLiability
When	LossFromServices	PegaIns-Data-ClaimCmp-Notice-GeneralLiability
Section	LossHistorywrapper	PegaIns-Data-Submission
Section	LossInformation	PegaIns-CSB-Work-FNOL-Auto-Pers
Section	LossInformationSummary	PegaIns-Data-ClaimCmp-Notice-Au
Control	MaleFemaleUnknown	
Portal	ManagerIIFComposite	
Flow	ManageRoutingToManager	PegaIns-Work
Activity	MapCaseSpecificResponse	Work-
Data Transform	MapMatchedLOBList	PegaIns-Data-AgencyLOB
Data Transform	MapNewContactProfileInfo	PegaIns-Work-ManageCustomerAc
Data Transform	MapOrganisationDetail	PegaIns-Data-Company
Data Transform	MapResponse	PegaIns-Data-OFAC

Rule Type	Rule Name	Applies To
Activity	MapVehiclesToDrivers	PegaIns-Data-InsurancePolicy-Pers Automotive
Activity	mapWorkTypeToClaimsLView	Data-Assignment-
Activity	MessageFinalCheck	PegaIns-Work-Application
Section	ModifyEndorsement	PegaIns-Work-ChgPolicy
Activity	NamedDriverPricingByProcedure	PegaIns-Data-PolCmp-NamedDrive
Activity	Nbb_Add	PegaIns-Work
Portal	NBBCaseManager	
Declare Expression	.NeedDocsBy	PegaIns-Data-PolicyLoan
When	NegligenceApplicableCoverages	@baseclass
Section	NegligenceDetailsCM	PegaIns-Data-ClaimCmp-Investigat
Data Transform	NewAddressForContact	PegaIns-Work-Contact
Data Transform	NewCommOptionForContact	PegaIns-Work-Contact
Activity	NewSubmission_Old	PegaIns-Work-ManageCustomerAc

Rule Type	Rule Name	Applies To
Section	NewUnderwritingData	PegaIns-Data-CustomerAccount
When	NoLossByAdvertising	PegaIns-Data-ClaimCmp-Notice-GeneralLiability
When	NoNamedContacts	PegaIns-Work-ManageCustomerAc
When	NoNegligencePercentages	@baseclass
When	noQuoteSelected	PegaIns-Data-PolCmp-Quote
When	NoReviewDisplay	PegaIns-CSB-Work
When	NotAClaimUnit	PegaIns-Data-ClaimCmp-PartyInvolvedInClaim
When	NotAClaimUnit	PegaIns-Data-ClaimCmp-VehicleInvolvedInClaim
Activity	NoticeDataUpdate	PegaIns-CSB-Work
Activity	NotifyEventForAgent	PegaIns-Work
Activity	ObtainCreditReport	PegaIns-Work-ManageCustomerAc
When	OneNamedContact	PegaIns-Work-ManageCustomerAc
Section	OpenApplicationsDisplay	PegaIns-Data-CustomerAccount

Rule Type	Rule Name	Applies To
When	OptionalCoverageSelected	PegaIns-Data-PolCmp-Coverage-
When	OptionFNOLID	PegaIns-Work
Section	OrganizationDisplay	Data-Party
Section	OrganizationDisplay	PegaIns-Data-Party-Org-
Section	OrganizationDisplay	PegaIns-Data-Party-Org-Company
Section	PartyDetails	PegaIns-Data-Party-Person
Activity	PartySearchExit	@baseclass
Activity	PartySearchExit	PegaIns-
Section	PassengerInjuryInformation	PegaIns-Data-ClaimCmp-VehicleInvolvedInClaim
When	pay_ClaimResolved	@baseclass
When	pay_ClaimUnitNotSelected	@baseclass
When	PaymentTypeSelected	PegaIns-Data-PolCmp-Payment
When	pay_PaymentInProgress	@baseclass

Rule Type	Rule Name	Applies To
When	PegaInsureGroups	Data-Admin-Operator-AccessGroup
Harness	PerformOld	PegaIns-CSB-Work-ClaimUnit-
Harness	Perform_Underwriter	PegaIns-Work
Declare Expression	.PeriodicPayment	PegaIns-Data-PolicyLoan
Activity	PersistOtherInsCo	PegaIns-Data-
Activity	PersistPropertyOwner	PegaIns-Data-ClaimCmp-PropertyD
Activity	PersistRepairVendor	PegaIns-Data-
Section	PersonBUHeaderImage	PegaIns-Data-Party-Org-Company
Section	PersonBUHeaderImage	PegaIns-Data-Party-Person
When	PhaniTest	Rule-Obj-Class
Section	PickAProduct	PegaIns-Work
When	PolicyAlreadyExists	PegaIns-Work-Application
When	PolicyCancelled	PegaIns-Work



Rule Type	Rule Name	Applies To
Section	PolicyDisplay	PegaIns-Data-CustomerAccount
Section	PolicyDisplay	PegaIns-Interface-InsurancePolicy
Control	Policyholder	
Section	PolicyHolderDetails	PegaIns-CSB-Work
When	PolicyholderIsVisible	PegaIns-Data-PolCmp-Customer
Validate	PolicyInfo	PegaIns-Work
HTML	PolicyList	Code-Pega-List
Activity	PolicyList	PegaIns-Data-InsurancePolicy
Section	PolicyListForPolicyholder	PegaIns-Work
Section	PolicySearch	PegaIns-Work
Control	PolicySelector	
Activity	PopulateAgencyData	PegaIns-Data-Party-Org-Agency
Activity	PopulateClassList	PegaIns-Landing

Rule Type	Rule Name	Applies To
Activity	PopulateClassList_bkup	PegaIns-Landing
Activity	PopulateEmailOptions	PegaIns-Work-ManageCustomerAc
Activity	PopulateFaxOptions	PegaIns-Work-ManageCustomerAc
Activity	PopulateLocations	PegaIns-Data-PolCmp- InsuredPropertyLocation
Activity	PopulatePayees	PegaIns-Data-Payments
Activity	PopulatePayments	PegaIns-Data-Payments
Activity	PopulatePhoneOptions	PegaIns-Work-ManageCustomerAc
Activity	PopulateProductList	PegaIns-Work-Application
Activity	PopulateVideoOptions	PegaIns-Work-ManageCustomerAc
Section	PortalLogo	Data-Portal
Activity	PostFetchPolicyData	PegaIns-Work-ChgPolicy
Activity	PreAddContact	PegaIns-
Activity	PreAddInsured	PegaIns-

Rule Type	Rule Name	Applies To
Section	PremisesInfoTab	PegaIns-Data-Application
Activity	PriceContent	PegaIns-Data-PolCmp-HomeContentBenefit
Activity	PricePlusSumOfSubcomponentPrices	PegaIns-Data-PolCmp-
Activity	PricePlusSumOfSubcomponentPrices	PegaIns-Data-PolCmp-BuildingContentBenefit
Activity	PricingByAgeAndDecisionTable	PegaIns-Data-PolCmp-InsuredLife
Activity	PricingGetForCoverage	PegaIns-Data-PolCmp-Coverage-
Activity	PricingGetForCoverage_old	PegaIns-Data-PolCmp-Party-Person Insured
Flow	ProcessACORDMessage	PegaIns-Work-Application
Activity	ProcessLOB	PegaIns-Work
Activity	ProcessPartyData	PegaIns-Work-Application
Activity	ProcessSelectedProduct	PegaIns-Work
When	ProductDataPageExists	PegaIns-Work
Activity	ProductsChosen	PegaIns-Data-PolCmp-Party-Person Insured

Rule Type	Rule Name	Applies To
Flow	ProductSelection	PegaIns-Work-Application
Activity	ProductTypeList	Rule-Obj-Class
When	PropertyCheck	PegaIns-Work
When	PropertyHasOwner	PegaIns-Data-ClaimCmp-PropertyD
Section	PropertyLossInformation	PegaIns-CSB-Work-FNOL-Property
When	ProvisionallyEligibleForInsurance	PegaIns-Work
Activity	pyAddManualLitigation	PegaIns-CSB-Work-ClaimUnit-
Activity	pyAddManualSubroInbound	PegaIns-CSB-Work-ClaimUnit-
Field Value	pyCaption CityStateZipForDisplay	PegaIns-Interface-InsurancePolicy
Activity	pyClaimsGetActions	PegaIns-CSB-Work
Harness	pyCmPerform	PegaIns-Work-Application
Data Transform	pyPreview	PegaIns-CSB-Work-ClaimFile
Data Transform	pyPreview	PegaIns-Data-Address-

Rule Type	Rule Name	Applies To
Data Transform	pyPreview	PegaIns-Data-URL-
Activity	QRCodeGenerator	PegaIns-
When	QuestionnaireFocusElementSet	PegaIns-
When	QuestionnaireLOB	PegaIns-Work
Activity	QuoteSelected	PegaIns-Data-PolCmp-Quote
Activity	ReadContactList	PegaIns-Work
Activity	RecentAddressDetails	PegaIns-Data-CustomerAccount
Activity	RecentEmailDetails	PegaIns-Data-CustomerAccount
Activity	RecentTelephoneDetails	PegaIns-Data-CustomerAccount
When	ReferralTypeMatch	PegaIns-Data-Attorney
Activity	RefreshPremiumGrid	PegaIns-Data-PolCmp-Coverage-
Deprecated: List View	ReleaseForms ALL	Link-Attachment
Activity	ReloadPerformHarness	PegaIns-Work

Rule Type	Rule Name	Applies To
Section	RemittanceInformation_ReadOnly	PegaIns-Data-ClaimCmp-SubrogationClaimDetails
Section	RemittanceInformation_ReadOnly	PegaIns-Data-Litigation
Data Transform	RemoveEmptyLOBs	PegaIns-Work
Activity	RemoveInsured	PegaIns-Data-PolCmp-Customer
Activity	RemoveUnderwriter	PegaIns-Work-Application
Correspondence	RenewalNotifyAgent Email	PegaIns-Work
Activity	ReopenClaimUnit	PegaIns-CSB-Work-ClaimUnit-
When	RepairAmountPaid	PegaIns-Data-ClaimCmp-
When	RepairAmountPaid	PegaIns-Data-Party-Org-RepairVen
Activity	RePrice	PegaIns-Work-Application
Activity	ResumeCA_Underwrite	PegaIns-Work-ManageCustomerAc
Activity	RetrieveAgencyList	PegaIns-Data-Party-Org-Agency
Activity	RetrieveAgencyList_ToDO	PegaIns-Data-Party-Org-Agency

Rule Type	Rule Name	Applies To
Activity	RetrieveAgentsList	PegaIns-Data-Party-Org-Agency
Activity	RetrieveOrgList	PegaIns-Work
Flow Action	ReValidateParties	PegaIns-Work
Harness	ReviewOld	PegaIns-CSB-Work-ClaimUnit-
Flow Action	ReviewSubLocationsView	PegaIns-Data-PolCmp- InsuredCommercialPropertyLocati
Section	RiskToleranceInstruction	PegaIns-Data-Submission-Life
Flow Action	RunAddresses	PegaIns-Work-ManageCustomerAc
Flow Action	RunEmailAddress	PegaIns-Data-CustomerAccount
Flow Action	RunEmailAddress	PegaIns-Work-ManageCustomerAc
Flow Action	RunLocation	PegaIns-Work-ManageCustomerAc
Activity	RunNamedDriver	PegaIns-Work-ManageCustomerAc
Activity	RunSaveAddressDetails	PegaIns-Work-ManageCustomerAc
Activity	RunSaveLocationDetails	PegaIns-Work-ManageCustomerAc

Rule Type	Rule Name	Applies To
Activity	RunSetTelephoneDefaults	PegaIns-Work-ManageCustomerAc
Flow Action	RunTelephoneNumber	PegaIns-Data-CustomerAccount
Flow Action	RunTelephoneNumber	PegaIns-Work-ManageCustomerAc
Flow Action	RunWebsite	PegaIns-Data-CustomerAccount
When	SalvageExists	PegaIns-Data-ClaimUnit
Activity	SaveAddressDetails	PegaIns-Data-CustomerAccount
Activity	SaveAddressDetails	PegaIns-Work-ManageCustomerAc
Activity	SaveContact	PegaIns-Work
Activity	SaveCustomerAccountDetails	PegaIns-Work
Activity	SaveLocationDetails	PegaIns-Data-CustomerAccount
Activity	SaveLocationDetails	PegaIns-Work-ManageCustomerAc
Activity	SaveNamedContactDetails	PegaIns-Work-ManageCustomerAc
Activity	SaveNamedDriverDetails	PegaIns-Work-ManageCustomerAc



Rule Type	Rule Name	Applies To
Activity	SaveNegligenceDetails	PegaIns-Data-ClaimCmp-Investigat
Activity	SaveNewAgencyComm	PegaIns-Data-Party-Org-Agency
Activity	SaveNewAgentAddress	PegaIns-Data-Party-Org-Agency
Activity	SaveNewAgentComm	PegaIns-Data-Party-Org-Agency
Activity	SaveNewAgentDtls	PegaIns-Data-Party-Org-Agency
Activity	SaveNews	@baseclass
Activity	SaveUnderwritingData	PegaIns-Data-CustomerAccount
Activity	SaveUnderwritingData	PegaIns-Work-ManageCustomerAc
Activity	SearchAgain	PegaIns-Work-ManageCustomerAc
Section	SearchNamedDrivers	PegaIns-Data-PolCmp-NamedDrive
Activity	SearchVendorList	PegaIns-Data-Vendor
When	SectionValueDashboard	PegaIns-Data-Portal
When	SectionValueReports	PegaIns-Data-Portal

Rule Type	Rule Name	Applies To
When	SectionValueWork	PegaIns-Data-Portal
Flow	SelectContact	PegaIns-Work-Application
Section	SelectCoverage_old	PegaIns-Data-Application-Life
Flow Action	SelectCustomer	PegaIns-Work
Control	SelectedBuildingCoverage	
Control	SelectedContentCoverage	
Control	SelectedDwellingCoverage	
Control	SelectedLiabilityArea	
Control	SelectedLocation	
Control	SelectedLocationBuilding	
Control	SelectedLocationCoverage	
Control	SelectedLocationDwelling	
Control	SelectedSpcltmCoverage	

Rule Type	Rule Name	Applies To
Control	SelectedSpecifiedItem	
Control	SelectIndivAuto	
Control	SelectIndivDriver	
Control	SelectIndivVehicleCoverage	
Flow	SelectPolicy	PegaIns-Work-ChgPolicy
Activity	SetAge	PegaIns-Data-PolCmp-NamedDrive
Activity	SetCAForBUContact	PegaIns-Work
Activity	SetCAForContact	PegaIns-Work
Data Transform	SetContactData	PegaIns-Work
Activity	SetCorrPreferences	PegaIns-Work
Data Transform	SetCoverageSelectedFlag	PegaIns-Data-PolCmp-InsuredCommercialPropertyLocati
Activity	SetCUDetailsOnClaimFile	@baseclass
Activity	SetDiseaseLimits	PegaIns-Data-PolCmp-LimitsOfLiab

Rule Type	Rule Name	Applies To
Activity	SetDriverIndex	PegaIns-Data-PolCmp-NamedDriver
Activity	SetExposedColumns	PegaIns-Interface-InsurancePolicy
Activity	SetInsuredDriver	PegaIns-Data-ClaimCmp-VehicleInvolvedInClaim
Data Transform	SetInsuredQuestions	PegaIns-Data-PolCmp-Party-Person Insured
Activity	SetLocationState	PegaIns-Data-PolCmp-RatingState
Activity	SetLossDescription	PegaIns-Work
Activity	SetNewReserveAmount	PegaIns-Data-ClaimUnit
Data Transform	SetOnCascadeValue	PegaIns-Data-
Activity	SetPartyRole	PegaIns-Work
Activity	SetPolicyType	PegaIns-Work
Activity	SetPrimaryVideo	PegaIns-Work-ManageCustomerAc
Data Transform	SetSelectedCoverage	PegaIns-Data-PolCmp-CoverageComponent
Data Transform	SetupDiscountGrid	PegaIns-Data-PolCmp-PremiumGri

Rule Type	Rule Name	Applies To
Activity	SetupInsClassExplorer	PegaIns-Landing
Activity	SetupInsPropertiesExplorer	Rule-Obj-Class
Activity	SetupInsuredProduct	PegaIns-Data-PolCmp-Party-Person Insured
Activity	SetUpOtherPayee	PegaIns-Data-Payments
Activity	SetupPremiumGrid	PegaIns-Data-PolCmp-Party-Person Insured
Activity	SetUpProductData	PegaIns-Data-PolCmp-Product-
Activity	SetUpProductList	PegaIns-Data-PolCmp-Party-Person Insured
Activity	SetupProductSelect	PegaIns-Data-PolCmp-Customer
Activity	SetupProductSelect	PegaIns-Data-PolCmp-Party-Person Insured
Activity	SetUpSelectedProduct	PegaIns-Work-Application
Activity	SetVehicleIndex	PegaIns-Data-PolCmp-InsuredVehi
Activity	SetVehicleInformation	PegaIns-Data-ClaimCmp- VehicleInvolvedInClaim
Activity	SetWebsiteDefaults	PegaIns-Data-CustomerAccount

Rule Type	Rule Name	Applies To
Activity	SetWebsiteDefaults	PegaIns-Work-ManageCustomerAc
Data Transform	SetWorkPageQuestion	PegaIns-Data-PolCmp-Party-Person Insured
Activity	ShowClaimsWorkView	Data-Gadget
When	ShowCmReview	PegaIns-Work
Activity	ShowNews	PegaIns-Data-Portal
Flow Action	ShowQuoteAndIllustration	PegaIns-Work-Application-Indiv-VarUnivLife
Section	ShowRiskCoveragesWrap_Readonly	PegaIns-Data-
Section	ShowSurveyMethod	PegaIns-Data-PolCmp-Party-Person Insured
When	SICFactorFilter	PegaIns-Data-SICFactor
When	SICGroupFilter	PegaIns-Data-SICGroup
Section	SinglePaymentDetails	PegaIns-Data-Payments
Activity	SmartInfo	Embed-ListParams
Activity	StartQuickAddContactForPolicy	PegaIns-Work

Rule Type	Rule Name	Applies To
When	StateNotMO	PegaIns-Work
Section	SubjectSummaryEdit	Data-Party
Section	SubjectSummaryEdit	PegaIns-Data-Party-
Flow Action	SubLocationsRiskInfo	PegaIns-Data-PolCmp- InsuredCommercialPropertyLocati
When	SubroExists	PegaIns-Data-ClaimUnit
When	SurveyCompleted	PegaIns-Data-PolCmp-Party-Person Insured
Activity	TakeActionNamedDriver	PegaIns-Work-ManageCustomerAc
Activity	TakeActionNamedInsured	PegaIns-Work-ManageCustomerAc
Activity	TakeActionUnderwritingInformation	PegaIns-Work-ManageCustomerAc
Section	TelephoneDisplay	PegaIns-Data-CustomerAccount
Data Transform	testDT	PegaIns-
When	testMatch	PegaIns-CSB-Work-Subrogation
Activity	TestReadActiv	PegaIns-Data-PolCmp-InsuredVehi

Rule Type	Rule Name	Applies To
Activity	TNavProductsChosen	PegaIns-Data-PolCmp-Party-Person Insured
HTML	TransEffDate	PegaIns-Work
Deprecated: List View	UnresolvedClaimsUnderClaimFile ALL	PegaIns-CSB-Work
Deprecated: List View	UnresolvedFNOLCount ALL	PegaIns-CSB-Work-FNOL
Activity	UpdateAccidentDescription	PegaIns-CSB-Work-ClaimFile
Activity	UpdateAddressDetails	PegaIns-Data-Address-
Flow Action	UpdateContactAddress	PegaIns-Work-ManageCustomerAc
Flow Action	UpdateContactCommOption	PegaIns-Work-ManageCustomerAc
Flow Action	UpdateContactNameAndProfile	PegaIns-Work-ManageCustomerAc
Activity	UpdateEmailDetails	PegaIns-Data-Email-
Activity	UpdateFnoIData	PegaIns-Data-ClaimCmp-Notice-
Activity	UpdateFnoIData	PegaIns-Data-ClaimCmp-Notice-Au
Activity	UpdateLastTransaction	PegaIns-Work-ChgPolicy



Rule Type	Rule Name	Applies To
Activity	UpdatePoliciesWithLOBDetails	PegaIns-Work
Activity	UpdatePolicyDates	PegaIns-Interface-InsurancePolicy
Activity	UpdateSampleData	PegaIns-Interface-InsurancePolicy
Activity	UpdateTelephoneDetails	PegaIns-Data-Telephone-
Activity	UpdateWC	PegaIns-Interface-InsurancePolicy
Activity	UpdateWitnessCMAquireLock	@baseclass
Activity	UpdateWitnessCMWorkSave	@baseclass
Portal	UserIIFComposite	
Activity	ValidateFeatureOpts	PegaIns-Data-PolCmp-AutoCoverage
Activity	ValidateNamedDriver	PegaIns-Data-PolCmp-NamedDriver
Activity	ValidateNamedInsured	PegaIns-Data-PolCmp-NamedInsured
Activity	ValidateNDSelection	PegaIns-Work-ManageCustomerAc
Activity	ValidatePaymentCode	PegaIns-Data-PaymentCodes

Rule Type	Rule Name	Applies To
Activity	ValidatePickProduct	PegaIns-Work-Application
Validate	ValidateProperties	PegaIns-Data-PolCmp-Party-Person
When	ValidateReserveAmount	PegaIns-Data-PolCmp-AutoCoverage
Activity	ValidateTransEffDate	PegaIns-Work-ChgPolicy
Activity	VerifyInsuredVehicleData	PegaIns-Data-ClaimCmp-VehicleInvolvedInClaim-Pers
Activity	VerifyNegligencePercentages	@baseclass
Activity	VerifyOtherVehicleData	PegaIns-Data-ClaimCmp-VehicleInvolvedInClaim-Pers
Activity	VerifyRequest_BaseOnClassName	PegaAccel-Management-Refactor-F
Activity	ViewEndorsementBasis	PegaIns-Work
Activity	ViewFNOLSnapshot	PegaIns-CSB-Work
Activity	ViewPartySnapshot	PegaIns-CSB-Work
Activity	ViewPolicyFromList	PegaIns-Work
Activity	ViewPolicyInCF	PegaIns-Work

Rule Type	Rule Name	Applies To
Activity	ViewPolicyInCU	PegaIns-Work
Activity	ViewPolicySnapshot	PegaIns-CSB-Work
Activity	ViewPolicySnapshot	PegaIns-Work
Activity	ViewSubjectPolicy	PegaIns-Data-InsurancePolicy
Activity	ViewSubjectPolicy	PegaIns-Work
When	WCCFType	PegaIns-CSB-Work
Section	WCGeneralQuestionnaire	PegaIns-Work
Section	WebsiteDisplay	PegaIns-Data-CustomerAccount
When	WentToDoctors	PegaIns-Data-ClaimCmp-Notice-WorkersComp
When	WentToHospital	PegaIns-Data-ClaimCmp-Notice-WorkersComp
Portal	WorkManager	
Section	WorkObjectInfo	PegaIns-Work
When	WorkResolved	@baseclass

Rule Type	Rule Name	Applies To
Portal	WorkUser	

## 8.5 Deprecated rules

The following table lists the deprecated rules of Pega Foundation for Insurance for 8.5 release.

Name	Rule Type	Applies to
webwb desktop_enduser62 css	Text File	
PaymentsExpandContractList	Control	
CUSearchBar	HTML Fragment	
webwb CAListViewSelector js	Text File	
webwb desktop_agentbrokerportalskin css	Text File	
webwb desktop_compositebrand css	Text File	
webwb desktop_pycmhomemaria css	Text File	
webwb jquery js	Text File	
webwb jquery-ui css	Text File	

Name	Rule Type	Applies to
webwb jquery-ui js	Text File	
webwb NotesPDFCSS css	Text File	
webwb ScriptforCU js	Text File	
CUSearchByLastNameButton	HTML Fragment	
downloadFieldsDetail	Section	@baseclass
BUStockLink	Control	
NewSubmission_CAButton	Control	
PackagelIdentifier	Control	
RecentWorkListGadget	Control	
SelectLOB	Control	
SelectPayment	Control	
SICWizard	Control	
UpdateUWData_Button	Control	

Name	Rule Type	Applies to
pyClaimsFlowsDisplayScripts	Section	@baseclass
CUSearchBar	Section	Data-Gadget
CUSearchBarByLastNameButton	Section	Data-Gadget
InsuranceNewsFeeds	Section	Data-Portal
OpenWorkByID	Section	PegaIns-
Assignments	Section	PegaIns-
EmailActionLinkStyles	Section	PegaIns-
FlowsDisplayScripts	Section	PegaIns-
FNOLReview	Section	PegaIns-CSB-Work
emptySection	Section	PegaIns-Data-Address-
ReserveHistory	Section	PegaIns-Data-ClaimCmp-Reserve-
PopulateReservesForGrid	Section	PegaIns-Data-ClaimUnit
PartyDisplayReadOnly	Section	PegaIns-Data-InsurancePolicy

Name	Rule Type	Applies to
PartyDisplay	Section	PegaIns-Work-Application-Com-
simulatedReturnIllus	Section	PegaIns-Work-Application-Indiv-VarUnivLife
ReviewPolicyData	Section	PegaIns-Interface-InsurancePolicy
CoreParty	Section	PegaIns-Work
InquiryInformation	Section	PegaIns-Work
OnloadDisplayPerformHarness	Section	PegaIns-Work
PartyDisplay	Section	PegaIns-Work
PartyDisplayReadOnly	Section	PegaIns-Work
Validate_isNotFutureDate	Section	PegaIns-Work
ViewCreditReports	Section	PegaIns-Work
CoreParty	Section	PegaIns-Work-Application
CoreParty	Section	PegaIns-Work-ChgPolicy
AttachFile	Section	PegaIns-Work-ManageCustomerAccount

Name	Rule Type	Applies to
ViewCreditReports	Section	PegaIns-Work-ManageCustomerAccount
CARefreshParentTab	Section	PegaIns-Work-ManageCustomerAccount-Location
MACAssignmentListHeaderTitle	Section	Work-
pyClaimsActionList	Section	Work-
OpenWorkFromSearch	Section	Work-Cover-
NegligenceAlert	HTML	@baseclass
PartySearchButton	HTML	PegaIns-Data-Party-Org-Company
PartySearchButton	HTML	PegaIns-Data-Party-Person
crazy	HTML	PegaIns-Work

### 8.3 Deprecated rules

The following table lists the deprecated rules of Pega Foundation for Insurance for 8.3 release.

Name	Rule Type	Applies to	Ruleset	Ruleset version
PropertyDamage	Property	PegaIns-Data-ClaimCmp-	PegaInsure	08-03-01



## 8.1 Deprecated rules

The following table lists the deprecated rules of Pega Foundation for Insurance for 8.1 release.

Name	Rule Type	Applies to
List	List	PegaInsProd-Data-InsuranceType
List	List	PegaInsProd-Data-Jurisdiction-Primary
List	List	PegaInsProd-Data-Jurisdiction-Secondary
List	List	PegaInsProd-Data-MarketSegment
DataTableClassEditor ALL	Deprecated: List View	PegaInsProd-Data-InsuranceType
DataTableClassEditor ALL	Deprecated: List View	PegaInsProd-Data-Jurisdiction-Primary
DataTableClassEditor ALL	Deprecated: List View	PegaInsProd-Data-Jurisdiction-Secondary
DataTableClassEditor ALL	Deprecated: List View	PegaInsProd-Data-MarketSegment
pyCaption Mailroom Workbasket	Field Value	@baseclass
pyCaption Mailroom@Insko WorkBasket	Field Value	@baseclass
List	List	PegaIns-Data-TermLimits
List	List	PegaIns-Data-TermPrices
List	List	PegaIns-Data-VehicleInfo
List	List	PegaIns-Data-Vendor

Name	Rule Type	Applies to
List	List	Pegalns-Data-VldtOccupEventExpo
List	List	Pegalns-Data-Attorney
List	List	Pegalns-Data-BodyPartsDivision
List	List	Pegalns-Data-BodyPartsMajor
List	List	Pegalns-Data-BodyPartsMinor
List	List	Pegalns-Data-BodyPartsSub
List	List	Pegalns-Data-BroadOccupations
List	List	Pegalns-Data-ClassCodes
List	List	Pegalns-Data-CodeTable
List	List	Pegalns-Data-DetailedOccupation
List	List	Pegalns-Data-EventExposureDivision
List	List	Pegalns-Data-EventExposureMajor
List	List	Pegalns-Data-EventExposureMinor
List	List	Pegalns-Data-EventExposureSub
List	List	Pegalns-Data-HazardCodes
List	List	Pegalns-Data-InjuryCode
List	List	Pegalns-Data-InjuryDivision
List	List	Pegalns-Data-InjuryMinorCode
List	List	Pegalns-Data-InjurySubCode
List	List	Pegalns-Data-InvestigativeEvents
List	List	Pegalns-Data-LOBsByPartyType
List	List	Pegalns-Data-MajorOccupations
List	List	Pegalns-Data-Make
List	List	Pegalns-Data-MinorOccupations

Name	Rule Type	Applies to
List	List	PegaIns-Data-Model
List	List	PegaIns-Data-PaymentCodes
List	List	PegaIns-Data-PaymentValidations
List	List	PegaIns-Data-PolCmp-CoverageDefault
List	List	PegaIns-Data-PolCmp-Customer
List	List	PegaIns-Data-PolCmp-SurveyResult
List	List	PegaIns-Data-SICDivision
List	List	PegaIns-Data-SICFactor
List	List	PegaIns-Data-SICGroup
List	List	PegaIns-Data-SicToNaics
List	List	PegaIns-Interface-Agency
List	List	PegaIns-Interface-Agent
List	List	PegaIns-Interface-Vehicles
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Interface-Vehicles
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-Attorney
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-BodyPartsDivision
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-BodyPartsMajor
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-BodyPartsMinor
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-BodyPartsSub
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-BroadOccupations
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-ClassCodes
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-CodeTable
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-DetailedOccupation
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-EventExposureDivision

Name	Rule Type	Applies to
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-EventExposureMajor
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-Make
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-EventExposureMinor
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-EventExposureSub
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-InjuryCode
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-InjuryDivision
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-InjuryMinorCode
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-InjurySubCode
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-InvestigativeEvents
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-MinorOccupations
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-PaymentCodes
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-PaymentValidations
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-PolCmp-CoverageDefault
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-PolCmp-Customer
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-PolCmp-SurveyResult
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-SICDivision
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-SICFactor
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-SICGroup
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-SicToNaics
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-TermLimits
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-TermPrices
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-Vendor
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-VldtOccupEventExpo
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Interface-Agency

## Withdrawn rules

This page lists the list of withdrawn rules of Pega Foundation for Insurance for 8.x releases.

### '23 Withdrawn rules

The following table lists the withdrawn rules of Pega Foundation for Insurance for '23 release.

Name	Rule Type	Applies to	Ruleset
ContactPhoneNumber_satish1	Property	PegaIns-Data-Party-	PegaInsure
DataTableEditorReport	Report Definition	PegaIns-Data-LOBsByPartyType	PegaInsure
DataTableEditorReport	Report Definition	PegaIns-Data-Model	PegaInsure
DataTableEditorReport	Report Definition	PegaIns-Data-PolCmp-CoverageDefaults	PegaInsure
DataTableEditorReport	Report Definition	PegaIns-Data-PolCmp-SurveyResult	PegaInsure
PortalLogo	Section	Data-Portal	PegaInsure
DispCompletedOperations	Section	PegaIns-Data-Application	PegaInsure
DispGeneralInformation	Section	PegaIns-Data-Application	PegaInsure
InsuredVehicleDisposition	Section	PegaIns-Data-ClaimCmp-	PegaInsure

Name	Rule Type	Applies to	Ruleset
		VehicleInvolvedInClaim	
getCustomerProfileDetails_rikek	Section	PegaIns-Data-CustomerProfile	PegaInsure
PersonBUHeaderImage	Section	PegaIns-Data-Party-Person	PegaInsure
DisplayAllCoverages	Section	PegaIns-Data-PolCmp-InsuredVehicle	PegaInsure
CAEnterCommOptions	Section	PegaIns-Interface-Contact	PegaInsure
AppAddPrimaryRecordComm	Section	PegaIns-Work	PegaInsure
ShowQuoteAndIllustration	Flow Action	PegaIns-Work-Application-Indiv-VarUnivLife	PegaInsure
RunAddresses	Flow Action	PegaIns-Work-ManageCustomerAccount	PegaInsure
ClearSubComponentAdjPrice	Activity	@baseclass	PegaInsure
GetLocalizedReasonsForDisablingMakePayment_rrtest	Activity	@baseclass	PegaInsure
IIFNextGenGetContactDetails	Activity	PegaIns-	PegaInsure
LinkAgencyInfo_TODO	Activity	PegaIns-Data-Party-Org-Agency	PegaInsure

Name	Rule Type	Applies to	Ruleset
RetrieveAgencyList_ToDO	Activity	PegaIns-Data-Party-Org-Agency	PegaInsure
CreateGrid	Activity	PegaIns-Data-PolCmp-Coverage-	PegaInsure
TestReadActiv	Activity	PegaIns-Data-PolCmp-InsuredVehicle	PegaInsure
SetDriverIndex	Activity	PegaIns-Data-PolCmp-NamedDriver	PegaInsure
CoverageChangeIG	Activity	PegaIns-Data-PolCmp-ProductList	PegaInsure
UpdateContactNameAndProfile	Flow Action	PegaIns-Work-ManageCustomerAccount	PegaInsure
CommIPropertyCoveragesSpecialBlanket_pabsysadmin	Data Transform	PegaIns-Data-PolCmp-CoverageComponent	PegaInsure
SetCoverageSelectedFlag	Data Transform	PegaIns-Data-PolCmp-InsuredCommercialPropertyLocation	PegaInsure
AddPolicyDetailPage	Data Transform	PegaIns-Interface-InsurancePolicy	PegaInsure
MapNewContactProfileInfo	Data Transform	PegaIns-Work-ManageCustomerAccount	PegaInsure

Name	Rule Type	Applies to	Ruleset
ClaimResolved	When	@baseclass	PegaInsure
IIFNoBusinessUnitPartyExists_bkup	When	PegaIns-	PegaInsure
IIFNotBusinessCustomer	When	PegaIns-	PegaInsure
IIFOriginatorPartyExists	When	PegaIns-	PegaInsure
IIFOwnerPartyExists	When	PegaIns-	PegaInsure
testMatch	When	PegaIns-CSB-Work-Subrogation	PegaInsure
IsScheduleRatingNonEmpty	When	PegaIns-Data-	PegaInsure
WentToDoctors	When	PegaIns-Data-ClaimCmp-Notice-WorkersComp	PegaInsure
WentToHospital	When	PegaIns-Data-ClaimCmp-Notice-WorkersComp	PegaInsure
IsPolicyCorrectClass	When	PegaIns-Data-InsurancePolicy	PegaInsure
LOBIsIndividual	When	PegaIns-Data-Party-	PegaInsure
ValidateReserveAmount	When	PegaIns-Data-PolCmp-AutoCoverage	PegaInsure
GotPolicyData	When	PegaIns-Work	PegaInsure
IsBUSelected	When	PegaIns-Work	PegaInsure
LOBIsIndividual	When	PegaIns-Work	PegaInsure



Name	Rule Type	Applies to	Ruleset
PolicyCancelled	When	PegaIns-Work	PegaInsure
AppCheckCommunicationPreference	When	PegaIns-Work-Contact	PegaInsure
AddWorkAllowed_Eddie	When	Work-Cover-	PegaInsure
PerformOld	Harness	PegaIns-CSB-Work-ClaimUnit-	PegaInsure
ReviewOld	Harness	PegaIns-CSB-Work-ClaimUnit-	PegaInsure
PolicySelector	Control		PegaInsure
PolicyHolderDetails	Section	PegaIns-CSB-Work	PegaInsure
PremisesInfoTab	Section	PegaIns-Data-Application	PegaInsure
PersonBUHeaderImage	Section	PegaIns-Data-Party-Org-Company	PegaInsure
BUList	Section	PegaIns-Work	PegaInsure
ReviewSubLocationView	Flow Action	PegaIns-Data-PolCmp-InsuredCommercialPropertyLocation	PegaInsure
CoverageAmountDisplay	Flow Action	PegaIns-Data-Submission-Life	PegaInsure
IncomeDetails	Flow Action	PegaIns-Data-Submission-Life	PegaInsure
LiabilitiesAndAssets	Flow Action	PegaIns-Data-Submission-Life	PegaInsure
ReValidateParties	Flow Action	PegaIns-Work	PegaInsure

Name	Rule Type	Applies to	Ruleset
crazy	Activity	PegaIns-Work	PegaInsure
IIFCreateBusinessUnitParty_test	Activity	PegaIns-Work	PegaInsure
ViewSubjectPolicy	Activity	PegaIns-Work	PegaInsure
CustomerAddressMapper1	Data Transform	Code-Pega-List	PegaInsure
CustomerCommOptionsMapper	Data Transform	Code-Pega-List	PegaInsure
testDT	Data Transform	PegaIns-	PegaInsure
SetSelectedCoverage	Data Transform	PegaIns-Data-PolCmp-CoverageComponent	PegaInsure
PolicyInfo	Validate	PegaIns-Work	PegaInsure
ListDuplicateFNOLs	Report Definition	PegaIns-CSB-Work-FNOL	PegaInsure
DataTableEditorReport	Report Definition	PegaIns-Data-PolCmp-Customer	PegaInsure

## 8.8 Withdrawn rules

The following table lists the withdrawn rules of Pega Foundation for Insurance for 8.8 release.

Name	Rule Type	Applies to	Ruleset
ActionSetUpProduct	Activity	PegaIns-Work-Application	PegaInsure
AddWorkAllowed	When	Work-Cover-	PegaInsure

Name	Rule Type	Applies to	Ruleset
BindPolicy	Activity	PegaIns-Work-ChgPolicy	PegaInsure
BindPolicy	Activity	PegaIns-Work-Application	PegaInsure
BindPolicy	Activity	PegaIns-Work	PegaInsure
ClaimAnalysis	Flow	PegaIns-CSB-Work-ClaimUnit-	PegaInsure
CreateNewEmptyPolicy	Activity	PegaIns-Interface-InsurancePolicy	PegaInsure
DevOperators 01.01	Product		PegaInsure
DoNothing	Activity	PegaIns-	PegaInsure
HOPolicy	When	PegaIns-Interface-PolicyLink	PegaInsure
HoPolicy	When	PegaIns-Interface-InsurancePolicy	PegaInsure
HOPolicy 07.15	Product		PegaInsure
IIFv36sp3_SamplePolicies 3.6	Product		PegaInsure
IIFv36sp4_SamplePolicies 3.6	Product		PegaInsure
IIFv41_SamplePolicies 04.01.00	Product		PegaInsure
InitializeDataForNewPolicy	Activity	PegaIns-Work-Application	PegaInsure
InitializeNewPolicyData	Activity	PegaIns-Work-Application	PegaInsure

Name	Rule Type	Applies to	Ruleset
InsuranceIndustryV 35SamplePoliciesFo rGL 3.5	Product		PegaInsure
IsASamplePolicy	When	PegaIns-Interface-	PegaInsure
isCA	When	PegaIns-Work- ManageCustomerAc count	PegaInsure
IsFWW001	When	PegaIns-Interface-	PegaInsure
IsGLSamplePolicy	When	PegaIns-Interface-	PegaInsure
IsSampleContact	When	PegaData-Contact	PegaInsure
IsSampleData	When	PegaIns-Interface- PolicyLink	PegaInsure
IsSampleData	When	PegaIns-Interface- DBA	PegaInsure
IsSampleData	When	PegaIns-Interface- BusinessUnit	PegaInsure
IsSampleData	When	PegaIns-Interface- Agent	PegaInsure
IsSampleData	When	PegaIns-Interface- Agency	PegaInsure
IsSampleData	When	PegaData- Organization	PegaInsure
IsSampleData	When	PegaData-Address	PegaInsure
IsSampleDataNat	When	PegaIns-Interface- PolicyLink	PegaInsure
IsSampleDataNat	When	PegaIns-Interface- InsurancePolicy	PegaInsure

Name	Rule Type	Applies to	Ruleset
MCA 01.01.01	Product		PegaInsure
MissedPolicies 07.15	Product		PegaInsure
MissedPOLicy	When	PegaIns-Interface- PolicyLink	PegaInsure
MissedPOLicy	When	PegaIns-Interface- InsurancePolicy	PegaInsure
NewBusinessBackb one 20090123T2013	Product		PegaInsure
NewMCA 01.01.01	Product		PegaInsure
Patch_Natalie_Song _LF1411144479 01-01	Product		PegaInsure
PegaInsuranceSam plePolicies 3.1	Product		PegaInsure
PegaInsuranceSam plePolicies 3.1-sp1	Product		PegaInsure
PegaInsuranceSam plePolicies 3.3	Product		PegaInsure
PegaInsuranceSam plePolicies 3.5	Product		PegaInsure
PFI_SampleData 8	Product		PegaInsure
ProductSelection	Flow	PegaIns-Work- Application	PegaInsure
PUI_Install 07.21	Product		PegaInsure
pyPreview	Data Transform	PegaIns-Data-URL-	PegaInsure

Name	Rule Type	Applies to	Ruleset
pyPreview	Data Transform	PegaIns-CSB-Work-ClaimFile	PegaInsure
SampleCoreCustData 01.01	Product		PegaInsure
SamplePol	When	PegaIns-Interface-PolicyLink	PegaInsure
SamplePolicies 2.0	Product		PegaInsure
SamplePoliciesv63_Install 06.03	Product		PegaInsure
SelectPolicy	Flow	PegaIns-Work-ChgPolicy	PegaInsure
TNavProductsChosen	Activity	PegaIns-Data-PolCmp-Party-Person-Insured	PegaInsure
UpdatePolicyDates	Activity	PegaIns-Interface-InsurancePolicy	PegaInsure
Validate	Validate	PegaIns-Data-BodyPartsMajor	PegaInsure

## 8.7 withdrawn rules

The following table lists the withdrawn rules of Pega Foundation for Insurance for 8.7 release.

Name	Rule Type	Applies to	Ruleset
DataTableClassEditor ALL	Deprecated: List View	PegaInsProd-Data-MarketSegment	PegaIns-Product

Name	Rule Type	Applies to	Ruleset
DataTableClassEditor ALL	Deprecated: List View	PegaInsProd-Data-Jurisdiction-Secondary	PegaIns-Product
DataTableClassEditor ALL	Deprecated: List View	PegaInsProd-Data-Jurisdiction-Primary	PegaIns-Product
DataTableClassEditor ALL	Deprecated: List View	PegaInsProd-Data-InsuranceType	PegaIns-Product
List	List	PegaInsProd-Data-MarketSegment	PegaIns-Product
List	List	PegaInsProd-Data-Jurisdiction-Secondary	PegaIns-Product
List	List	PegaInsProd-Data-Jurisdiction-Primary	PegaIns-Product
List	List	PegaInsProd-Data-InsuranceType	PegaIns-Product
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Interface-Vehicles	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Interface-Agency	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-VldtOccupEventExp o	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-Vendor	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-TermPrices	PegaInsure

Name	Rule Type	Applies to	Ruleset
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-TermLimits	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-SicToNaics	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-SICGroup	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-SICFactor	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-SICDivision	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-PolCmp-SurveyResult	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-PolCmp-Customer	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-PolCmp-CoverageDefaults	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-PaymentValidations	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-PaymentCodes	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-MinorOccupations	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-Make	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-InvestigativeEvents	PegaInsure



Name	Rule Type	Applies to	Ruleset
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-InjurySubCode	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-InjuryMinorCode	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-InjuryDivision	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-InjuryCode	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-EventExposureSub	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-EventExposureMinor	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-EventExposureMajor	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-EventExposureDivision	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-DetailedOccupation	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-CodeTable	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-ClassCodes	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-BroadOccupations	PegaInsure

Name	Rule Type	Applies to	Ruleset
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-BodyPartsSub	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-BodyPartsMinor	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-BodyPartsMajor	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-BodyPartsDivision	PegaInsure
DataTableClassEditor ALL	Deprecated: List View	PegaIns-Data-Attorney	PegaInsure
List	List	PegaIns-Interface-Vehicles	PegaInsure
List	List	PegaIns-Interface-Agent	PegaInsure
List	List	PegaIns-Interface-Agency	PegaInsure
List	List	PegaIns-Data-VldtOccupEventExp o	PegaInsure
List	List	PegaIns-Data-Vendor	PegaInsure
List	List	PegaIns-Data-VehicleInfo	PegaInsure
List	List	PegaIns-Data-TermPrices	PegaInsure
List	List	PegaIns-Data-TermLimits	PegaInsure

Name	Rule Type	Applies to	Ruleset
List	List	PegaIns-Data-SicToNaics	PegaInsure
List	List	PegaIns-Data-SICGroup	PegaInsure
List	List	PegaIns-Data-SICFactor	PegaInsure
List	List	PegaIns-Data-SICDivision	PegaInsure
List	List	PegaIns-Data-PolCmp-SurveyResult	PegaInsure
List	List	PegaIns-Data-PolCmp-Customer	PegaInsure
List	List	PegaIns-Data-PolCmp-CoverageDefaults	PegaInsure
List	List	PegaIns-Data-PaymentValidations	PegaInsure
List	List	PegaIns-Data-PaymentCodes	PegaInsure
List	List	PegaIns-Data-Model	PegaInsure
List	List	PegaIns-Data-MinorOccupations	PegaInsure
List	List	PegaIns-Data-Make	PegaInsure
List	List	PegaIns-Data-MajorOccupations	PegaInsure

Name	Rule Type	Applies to	Ruleset
List	List	PegaIns-Data-LOBsByPartyType	PegaInsure
List	List	PegaIns-Data-InvestigativeEvents	PegaInsure
List	List	PegaIns-Data-InjurySubCode	PegaInsure
List	List	PegaIns-Data-InjuryMinorCode	PegaInsure
List	List	PegaIns-Data-InjuryDivision	PegaInsure
List	List	PegaIns-Data-InjuryCode	PegaInsure
List	List	PegaIns-Data-HazardCodes	PegaInsure
List	List	PegaIns-Data-EventExposureSub	PegaInsure
List	List	PegaIns-Data-EventExposureMinor	PegaInsure
List	List	PegaIns-Data-EventExposureMajor	PegaInsure
List	List	PegaIns-Data-EventExposureDivision	PegaInsure
List	List	PegaIns-Data-DetailedOccupation	PegaInsure

Name	Rule Type	Applies to	Ruleset
List	List	PegaIns-Data-CodeTable	PegaInsure
List	List	PegaIns-Data-ClassCodes	PegaInsure
List	List	PegaIns-Data-BroadOccupations	PegaInsure
List	List	PegaIns-Data-BodyPartsSub	PegaInsure
List	List	PegaIns-Data-BodyPartsMinor	PegaInsure
List	List	PegaIns-Data-BodyPartsMajor	PegaInsure
List	List	PegaIns-Data-BodyPartsDivision	PegaInsure
List	List	PegaIns-Data-Attorney	PegaInsure
crazy	HTML	PegaIns-Work	PegaInsure
PartySearchButton	HTML	PegaIns-Data-Party-Person	PegaInsure
PartySearchButton	HTML	PegaIns-Data-Party-Org-Company	PegaInsure
NegligenceAlert	HTML	@baseclass	PegaInsure
pyCaption Mailroom@Insco WorkBasket	Field Value	@baseclass	PegaInsure

Name	Rule Type	Applies to	Ruleset
pyCaption Mailroom Workbasket	Field Value	@baseclass	PegaInsure
OpenWorkFromSearch	Section	Work-Cover-	PegaInsure
pyClaimsActionList	Section	Work-	PegaInsure
MACAssignmentList HeaderTitle	Section	Work-	PegaInsure
CARefreshParentTab	Section	PegaIns-Work- ManageCustomerAccount-Location	PegaInsure
ViewCreditReports	Section	PegaIns-Work- ManageCustomerAccount	PegaInsure
AttachFile	Section	PegaIns-Work- ManageCustomerAccount	PegaInsure
CoreParty	Section	PegaIns-Work- ChgPolicy	PegaInsure
simulatedReturnIllus	Section	PegaIns-Work- Application-Indiv- VarUnivLife	PegaInsure
PartyDisplay	Section	PegaIns-Work- Application-Com-	PegaInsure
CoreParty	Section	PegaIns-Work- Application	PegaInsure
ViewCreditReports	Section	PegaIns-Work	PegaInsure

Name	Rule Type	Applies to	Ruleset
Validate_isNotFutureDate	Section	PegaIns-Work	PegaInsure
PartyDisplayReadOnly	Section	PegaIns-Work	PegaInsure
PartyDisplay	Section	PegaIns-Work	PegaInsure
OnloadDisplayPerformanceHarness	Section	PegaIns-Work	PegaInsure
InquiryInformation	Section	PegaIns-Work	PegaInsure
CoreParty	Section	PegaIns-Work	PegaInsure
ReviewPolicyData	Section	PegaIns-Interface-InsurancePolicy	PegaInsure
PartyDisplayReadOnly	Section	PegaIns-Data-InsurancePolicy	PegaInsure
PopulateReservesForGrid	Section	PegaIns-Data-ClaimUnit	PegaInsure
ReserveHistory	Section	PegaIns-Data-ClaimCmp-Reserve-	PegaInsure
emptySection	Section	PegaIns-Data-Address-	PegaInsure
FNOLReview	Section	PegaIns-CSB-Work	PegaInsure
OpenWorkByID	Section	PegaIns-	PegaInsure
FlowsDisplayScripts	Section	PegaIns-	PegaInsure
EmailActionLinkStyles	Section	PegaIns-	PegaInsure
Assignments	Section	PegaIns-	PegaInsure

Name	Rule Type	Applies to	Ruleset
InsuranceNewsFeeds	Section	Data-Portal	PegaInsure
CUSearchByLastNameButton	Section	Data-Gadget	PegaInsure
CUSearchButton	Section	Data-Gadget	PegaInsure
pyClaimsFlowsDisplayScripts	Section	@baseclass	PegaInsure
downloadFieldsDetail	Section	@baseclass	PegaInsure
UpdateUWData_Button	Control		PegaInsure
SICWizard	Control		PegaInsure
SelectPayment	Control		PegaInsure
SelectLOB	Control		PegaInsure
RecentWorkListGadget	Control		PegaInsure
PaymentsExpandContractList	Control		PegaInsure
PackageIdentifier	Control		PegaInsure
NewSubmission_CA_Button	Control		PegaInsure
BUStockLink	Control		PegaInsure
CUSearchByLastNameButton	HTML Fragment		PegaInsure
CUSearchButton	HTML Fragment		PegaInsure



Name	Rule Type	Applies to	Ruleset
webwb ScriptforCU js	Text File		PegaInsure
webwb NotesPDFCSS css	Text File		PegaInsure
webwb jquery-ui js	Text File		PegaInsure
webwb jquery-ui css	Text File		PegaInsure
webwb jquery js	Text File		PegaInsure
webwb desktop_pycmhome maria css	Text File		PegaInsure
webwb desktop_enduser62 css	Text File		PegaInsure
webwb desktop_agentbrok erportalskin css	Text File		PegaInsure
webwb CAListViewSelector js	Text File		PegaInsure

## 8.6 Withdrawn rules

The following table lists the withdrawn rules of Pega Foundation for Insurance for 8.6 release.

Name	Rule Type	Applies to	Ruleset	Ruleset version
TaxProdstrucR elatedRap 01.01.01	Product		PegaIns- Product	08-06-01
PersonalAuto 01.01	Product		PegaIns- Product	08-06-01
PegaInsProduc t 20130709.150 506	Product		PegaIns- Product	08-06-01
CreateCompon entCategoryPa th 01.01	Product		PegaIns- Product	08-06-01
BUG_398346V 1 01.01.01	Product		PegaIns- Product	08-06-01
Toggle_Enable ExternalRating 20180809T070 951	When	@baseclass	PegaInsure	08-06-01
pyAgeByAssign eeIC ALL	Deprecated: Summary View	Assign- Worklist	PegaInsure	08-06-01
pyAgeByWork QueueIC ALL	Deprecated: Summary View	Assign- WorkBasket	PegaInsure	08-06-01
pyPreview	Data Transform	PegaIns-Work- Application- Pers- Automotive	PegaInsure	08-06-01

Name	Rule Type	Applies to	Ruleset	Ruleset version
pyPreview	Data Transform	PegaIns-Work-Application-Indiv-VarUnivLife	PegaInsure	08-06-01
pyPreview	Data Transform	PegaIns-Work-Application-Com-	PegaInsure	08-06-01
pyPreview	Data Transform	PegaIns-Work-Application	PegaInsure	08-06-01
pyPreview	Data Transform	PegaIns-Work	PegaInsure	08-06-01
UpdateProduct List	Activity	PegaIns-Work-Package	PegaInsure	08-06-01
InsGetPackage Data	Activity	PegaIns-Work-Package	PegaInsure	08-06-01
DefineProduct Data	Activity	PegaIns-Data-PolCmp-Product-	PegaInsure	08-06-01
SendEmailNotification	Activity	@baseclass	PegaInsure	08-06-01
FindDisplaySubComponent	Activity	@baseclass	PegaInsure	08-06-01
ReviewPolicyDetailsPopUp	Section	PegaIns-Work	PegaInsure	08-06-01
ReviewPolicyDetails	Section	PegaIns-Work	PegaInsure	08-06-01

Name	Rule Type	Applies to	Ruleset	Ruleset version
PersonalInjury States	Decision Table	PegaIns-CSB-Work	PegaInsure	08-06-01
EndUser62_ins	Skin		PegaInsure	08-06-01
CompositeBrandIIF	Skin		PegaInsure	08-06-01
CompositeBrand	Skin		PegaInsure	08-06-01
AgentBrokerPortalSkin	Skin		PegaInsure	08-06-01
ProcessArchitectSP	Portal		PegaInsure	08-06-01
InsSysAdminDD	Portal		PegaInsure	08-06-01
ComponentData Mail	Correspondence Fragment		PegaInsure	08-06-01
VULDemo 01-01-01 05	Product Patch		PegaInsure	08-06-01
PegaInsurance 3.3SP2 aigdemo	Product Patch		PegaInsure	08-06-01
PegaInsurance 2.3.5 2.1 Upgrade	Product Patch		PegaInsure	08-06-01
PegaInsurance 2.3.4 2.1 Upgrade	Product Patch		PegaInsure	08-06-01

Name	Rule Type	Applies to	Ruleset	Ruleset version
PegaInsurance 2.3.3 QA1	Product Patch		PegaInsure	08-06-01
PegaInsurance 2.3.3 2.1 Upgrade	Product Patch		PegaInsure	08-06-01
PegaInsurance 2.0 sp1	Product Patch		PegaInsure	08-06-01
PegaInsurance 2.0 03-02-01	Product Patch		PegaInsure	08-06-01
InsuranceDb2 01 InsuranceDb2S ql	Product Patch		PegaInsure	08-06-01
WorkObjectDel etionServiceRa ps 01.01.01	Product		PegaInsure	08-06-01
WCSurveyBack up 01.01	Product		PegaInsure	08-06-01
TestDB2 01.00.00	Product		PegaInsure	08-06-01
SamplePolicies SurveyCI 01-01	Product		PegaInsure	08-06-01
SamplePolicies CI 01-01	Product		PegaInsure	08-06-01
SampleMCAW orkObjects 01.01	Product		PegaInsure	08-06-01

Name	Rule Type	Applies to	Ruleset	Ruleset version
RightPanelButtons 01.01.01	Product		PegaInsure	08-06-01
PUI_SPR2639 01.01.01	Product		PegaInsure	08-06-01
PUI_SPR2625 01.01.01	Product		PegaInsure	08-06-01
PUI_PW 01.01.01	Product		PegaInsure	08-06-01
PUI723BetaTestingHotfix 01-01	Product		PegaInsure	08-06-01
Pgr170LatestRS 07.22	Product		PegaInsure	08-06-01
Pfufe 01.01.01	Product		PegaInsure	08-06-01
PFI_84_Security_patch 1.0	Product		PegaInsure	08-06-01
PegaWorldPolicy 1.0	Product		PegaInsure	08-06-01
pegainsureui 01.01	Product		PegaInsure	08-06-01
PegaInsurePUI Delta 01.01	Product		PegaInsure	08-06-01
PegaInsurepatch 07.13	Product		PegaInsure	08-06-01
PegaInsurePatch 07.11.05	Product		PegaInsure	08-06-01

Name	Rule Type	Applies to	Ruleset	Ruleset version
Pegainsure28 01.01.01	Product		PegaInsure	08-06-01
PegaInsure071 601 16.01	Product		PegaInsure	08-06-01
PegaInsure 07.03.28	Product		PegaInsure	08-06-01
PegaInsurance 3.3SP3	Product		PegaInsure	08-06-01
PegaInsurance 3.3SP2	Product		PegaInsure	08-06-01
PegaInsurance 3.3SP1	Product		PegaInsure	08-06-01
PegaInsurance 3.3	Product		PegaInsure	08-06-01
PegaInsurance 3.1-sp1	Product		PegaInsure	08-06-01
PegaInsurance 3.1	Product		PegaInsure	08-06-01
PegaInsurance 2.5	Product		PegaInsure	08-06-01
PegaInsurance 2.3SP1	Product		PegaInsure	08-06-01
PegaInsurance 2.3.5	Product		PegaInsure	08-06-01
PegaInsurance 2.3.4	Product		PegaInsure	08-06-01

Name	Rule Type	Applies to	Ruleset	Ruleset version
PegaInsurance 2.3.3	Product		PegaInsure	08-06-01
PegaInsurance 2.3.1	Product		PegaInsure	08-06-01
PegaInsurance 2.1	Product		PegaInsure	08-06-01
PegaInsurance 2.0	Product		PegaInsure	08-06-01
PegaInsurance 1.2	Product		PegaInsure	08-06-01
PegaInsurance 1.1	Product		PegaInsure	08-06-01
PegaInsurance 1.0	Product		PegaInsure	08-06-01
PegaInsSocial_ Addon 01.01	Product		PegaInsure	08-06-01
Pegainsproduc t 01.01	Product		PegaInsure	08-06-01
PegaInsDevUtil s 1.0	Product		PegaInsure	08-06-01
PegaInsClass 3.6	Product		PegaInsure	08-06-01
PegaInsACORD 01.01	Product		PegaInsure	08-06-01
PCI71_Sprint3 01.01	Product		PegaInsure	08-06-01



Name	Rule Type	Applies to	Ruleset	Ruleset version
PCI71_Sprint2 01.01	Product		PegaInsure	08-06-01
PBMap0723 01-01	Product		PegaInsure	08-06-01
PBIClassTest 07-10-13	Product		PegaInsure	08-06-01
NewLifeClaims 01.01.01	Product		PegaInsure	08-06-01
MoveSubmissi ons_Survey 01-01-01	Product		PegaInsure	08-06-01
MoveSubmissi ons 01-01-01	Product		PegaInsure	08-06-01
MissingPolicyN umber 01.01	Product		PegaInsure	08-06-01
Michael_Lassit er_Activity 01-01	Product		PegaInsure	08-06-01
Localization_Fi xes 07.15	Product		PegaInsure	08-06-01
Localization 01.01	Product		PegaInsure	08-06-01
InsuranceDb2 01	Product		PegaInsure	08-06-01
IIF_Sprint5 01.01	Product		PegaInsure	08-06-01

Name	Rule Type	Applies to	Ruleset	Ruleset version
IIF_SampleData 07.41	Product		PegaInsure	08-06-01
IIF_SampleData 07.31	Product		PegaInsure	08-06-01
IIF_Sample 07.40	Product		PegaInsure	08-06-01
IIF_Patch 07.23	Product		PegaInsure	08-06-01
IIF_Missed 07.22	Product		PegaInsure	08-06-01
IIF_Latest 07.22	Product		PegaInsure	08-06-01
IIF_HFIX3846 03.06.00	Product		PegaInsure	08-06-01
IIF_HFIX29165 01.01.01	Product		PegaInsure	08-06-01
IIF_716_Localization_Patch 07.16	Product		PegaInsure	08-06-01
IIFWORK_PATCH 0501	Product		PegaInsure	08-06-01
IIFv71_Comp_Install 07.10.01	Product		PegaInsure	08-06-01
IIFv71601_Install 07.16.01	Product		PegaInsure	08-06-01
IIFv7160121_CSI 07.16.01	Product		PegaInsure	08-06-01

Name	Rule Type	Applies to	Ruleset	Ruleset version
IIFv711_Install 07.11	Product		PegaInsure	08-06-01
IIFv710_Setup 07.10.01	Product		PegaInsure	08-06-01
IIFv710_Install 07.10.01	Product		PegaInsure	08-06-01
IIFv41_Rules 04.01.00	Product		PegaInsure	08-06-01
IIFv37_Rules 03.07.00	Product		PegaInsure	08-06-01
IIFv36_System Data 3.6	Product		PegaInsure	08-06-01
IIFv36_Rules 3.6	Product		PegaInsure	08-06-01
IIFv36sp7_Rule s 3.6	Product		PegaInsure	08-06-01
IIFv36sp6_Rule s 03.06.06	Product		PegaInsure	08-06-01
IIFv36sp5_Rule s 3.6	Product		PegaInsure	08-06-01
IIFv36sp4_Rule s 3.6	Product		PegaInsure	08-06-01
IIFv36sp3_Rule s 3.6	Product		PegaInsure	08-06-01
IIFv35_Rules 3.5	Product		PegaInsure	08-06-01

Name	Rule Type	Applies to	Ruleset	Ruleset version
IIFUI_Latest 07.22	Product		PegaInsure	08-06-01
IIFCrossBrowse r 01.01.01	Product		PegaInsure	08-06-01
IACRAP 01.01	Product		PegaInsure	08-06-01
HotfixforIIF 06-02-75	Product		PegaInsure	08-06-01
Hfix44612 07.40.01	Product		PegaInsure	08-06-01
HFix28305 7.21	Product		PegaInsure	08-06-01
GRPSampleSu bmission 01-01-01	Product		PegaInsure	08-06-01
emailrap 07.15	Product		PegaInsure	08-06-01
EmailAccounts 01.01	Product		PegaInsure	08-06-01
DunsBradstree tProdRap 01-01	Product		PegaInsure	08-06-01
DBSchema 06.02.02	Product		PegaInsure	08-06-01
CSIProperties_ PersonalAuto 07-16-28	Product		PegaInsure	08-06-01
CPMlv20_HFIX NNNN 2.0	Product		PegaInsure	08-06-01

Name	Rule Type	Applies to	Ruleset	Ruleset version
CorruptedSections 01.01	Product		PegaInsure	08-06-01
CensusBulkUpload 01-01	Product		PegaInsure	08-06-01
C8943 07.31	Product		PegaInsure	08-06-01
BulkUploadSettings 01.01.01	Product		PegaInsure	08-06-01
AppPostReadContactInfo 01.01.01	Product		PegaInsure	08-06-01
AgentUpdates 01.01	Product		PegaInsure	08-06-01
Accordv63_Install 06.03.02	Product		PegaInsure	08-06-01
AccordIIF6.3.2_Install 06.03.02	Product		PegaInsure	08-06-01
PegaSFAIv713-Int 07-13-01	Product		PegaInsure-Int	08-06-01
Piif_6.3 06.02.02	Product		Piif	08-06-01

## 8.2 Withdrawn rules

The following table lists the withdrawn rules of Pega Foundation for Insurance for 8.2 release.

Name	Rule Type	Applies to	Ruleset	Ruleset version
ProductVariantList	Property	Rule-InsProd-Product	PegaIns-PBFW	08-02-01
ProductVariantData	Property	Rule-InsProd-Product	PegaIns-PBFW	08-02-01
SourceEndorsementList	Property	Embed-InsProd-	PegaIns-PBFW	08-02-01
SelectedRiskEnd	Property	Embed-InsProd-	PegaIns-PBFW	08-02-01
SelectedPolicyEnd	Property	Embed-InsProd-	PegaIns-PBFW	08-02-01
ProdVarEndorsements	Property	Embed-InsProd-	PegaIns-PBFW	08-02-01
ProdVarCoverages	Property	Embed-InsProd-	PegaIns-PBFW	08-02-01
SaveCustomerInfo	Activity	PegaIns-Work-Application	PegaInsure	08-02-01
UtilitiesIsInPageList	Function		PegaInsure	08-02-01

## 8.1 Withdrawn rules

The following table lists the withdrawn rules of Pega Foundation for Insurance for 8.1 release.

Name	Rule Type	Applies to	Ruleset	Ruleset version
AppQuickAddContactDetails	HTML	PegaApp-Work-	PegaInsure	08-01-01

Name	Rule Type	Applies to	Ruleset	Ruleset version
pyMessageLabel SSN already exists.Please Enter Another SSN	Field Value	PegaApp-Work-	PegaInsure	08-01-01
pyMessageLabel Select One of the Preferred Methods	Field Value	PegaApp-Work-	PegaInsure	08-01-01
pyMessageLabel DuplicateEntry Video	Field Value	PegaApp-Work-	PegaInsure	08-01-01
pyMessageLabel DuplicateEntry PhoneAndFax	Field Value	PegaApp-Work-	PegaInsure	08-01-01
pyMessageLabel DuplicateEntry EmailAndSocialMedia	Field Value	PegaApp-Work-	PegaInsure	08-01-01
SecurityQuestion What is your PIN?	Field Value	PegaApp-Interface-	PegaInsure	08-01-01
SecurityQuestion What is the	Field Value	PegaApp-Interface-	PegaInsure	08-01-01

Name	Rule Type	Applies to	Ruleset	Ruleset version
street you grew up on?				
SecurityQuestion What is the name of your dog?	Field Value	PegaApp-Interface-	PegaInsure	08-01-01
SecurityQuestion What city were you born in?	Field Value	PegaApp-Interface-	PegaInsure	08-01-01
AppFindBusinessUnit	Section	PegaApp-Work-	PegaInsure	08-01-01
AppEnterContactAddresses	Section	PegaApp-Work-	PegaInsure	08-01-01
AppQuickAdd	Section	PegaApp-Interface-Contact	PegaInsure	08-01-01
AppEnterNewBusinessUnitInfo	Section	PegaApp-Interface-BusinessUnit	PegaInsure	08-01-01
SearchStringBusinessUnitName	Property	PegaApp-Work-	PegaInsure	08-01-01
SearchStringBusinessUnitID	Property	PegaApp-Work-	PegaInsure	08-01-01
QueryType	Property	PegaApp-Work-	PegaInsure	08-01-01



Name	Rule Type	Applies to	Ruleset	Ruleset version
BestTimeToCall	Property	PegaApp-Party-Contact	PegaInsure	08-01-01
Status	Property	PegaApp-Party-BusinessUnit	PegaInsure	08-01-01
CommunicationPreference	Property	PegaApp-Party-	PegaInsure	08-01-01
BestTimeToCall	Property	PegaApp-Party-	PegaInsure	08-01-01
ZipCode	Property	PegaApp-Interface-Contact	PegaInsure	08-01-01
UpdateCommunicationOption	Property	PegaApp-Interface-Contact	PegaInsure	08-01-01
SocialSecurityNumber	Property	PegaApp-Interface-Contact	PegaInsure	08-01-01
SearchDate	Property	PegaApp-Interface-Contact	PegaInsure	08-01-01
RemoveCommunicationOption	Property	PegaApp-Interface-Contact	PegaInsure	08-01-01
InsertCommunicationOption	Property	PegaApp-Interface-Contact	PegaInsure	08-01-01

Name	Rule Type	Applies to	Ruleset	Ruleset version
ImageInsKey	Property	PegaApp-Interface-Contact	PegaInsure	08-01-01
ImageFileName	Property	PegaApp-Interface-Contact	PegaInsure	08-01-01
ContactString	Property	PegaApp-Interface-Contact	PegaInsure	08-01-01
ContactImage_satish	Property	PegaApp-Interface-Contact	PegaInsure	08-01-01
ContactImage	Property	PegaApp-Interface-Contact	PegaInsure	08-01-01
ContactIdKey	Property	PegaApp-Interface-Contact	PegaInsure	08-01-01
ZipCode	Property	PegaApp-Interface-	PegaInsure	08-01-01
StateCode	Property	PegaApp-Interface-	PegaInsure	08-01-01
ManageCustomerAccountID	Property	PegaApp-Interface-	PegaInsure	08-01-01
DateTo	Property	PegaApp-Interface-	PegaInsure	08-01-01

Name	Rule Type	Applies to	Ruleset	Ruleset version
DateFrom	Property	PegaApp-Interface-	PegaInsure	08-01-01
CustomerAccountID	Property	PegaApp-Interface-	PegaInsure	08-01-01
ContactPartyType	Property	PegaApp-Interface-	PegaInsure	08-01-01
BusinessUnit	Property	PegaApp-	PegaInsure	08-01-01

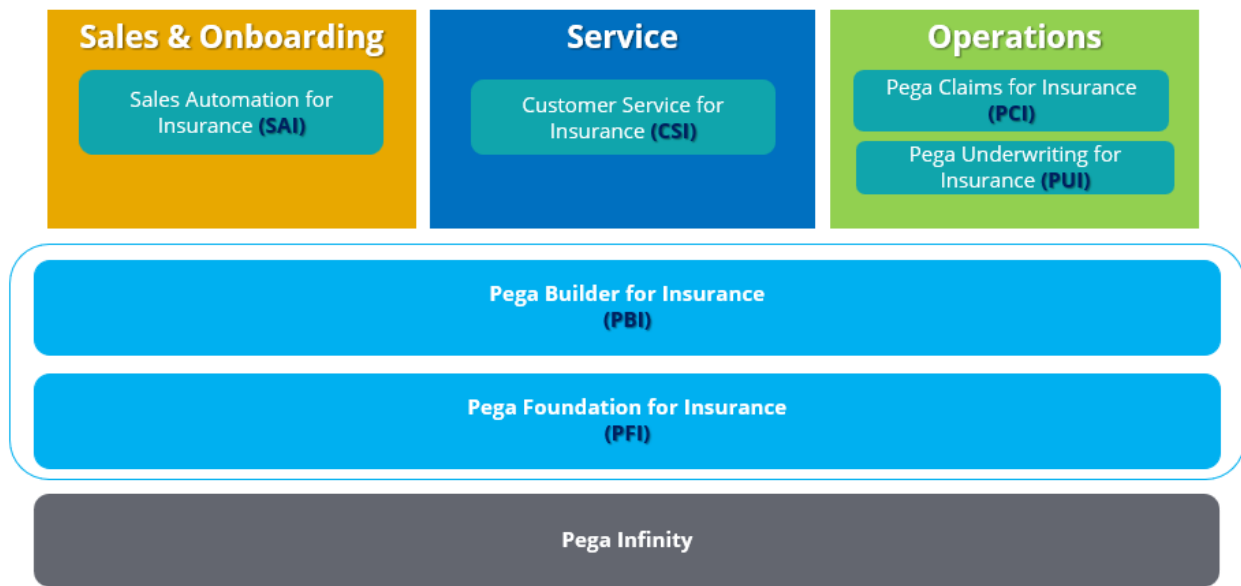
# Product overview

- [Overview](#)

## Overview

Key participants and stakeholders in the Insurance industry landscape are confronting heightened consumer expectations, customer churn and intense competition driving the need for agile systems. While, evolving technology, mergers and acquisitions, and the need to respond quickly to changing regulations create an IT ecosystem that can be fractured or disjointed.

Pega's center-out™ approach helps you shape your business architecture, and with Pega Foundation for Insurance (PFI), Pega delivers a truly reusable enterprise foundation comprising of data model, industry codes, cases, features and tools that can simplify and streamline insurance processes, accommodate unique requirements by line of business, geography, or other business factors, and deliver the agility needed to rapidly adapt business processes. PFI underpins a portfolio of Pega insurance applications catering to diverse business functions ranging from Sales & Onboarding, Customer Service to Operations.

*Business architecture*

- [Features](#)
- [Standard case types](#)
- [Primary data entities](#)
- [Roles, portals, and dashboards](#)
- [Further reading](#)

## Features

The Foundation for Insurance provides enterprise assets including pre-configured data models for commonly referenced insurance industry objects and codes, APIs for rapid integration with external sources of truth. These assets along with Pega platform allow rapid deployment of solutions that deliver productivity, spur growth, and ensure compliance.

The following sections describe key capabilities and features of the application that you can use as-is or extend to meet your business needs.

- **Insurance object model**
- **Insurance sample data**
- **Insurance object search and retrieval**
- **Customer data management**
- **Agency data management**
- **Industry codes management**
- **Integration data pages**
- **Product Builder for Insurance**

## Insurance object model

The core asset of the Pega Foundation for Insurance application is the object model, which is the baseline for all our Insurance Applications. It contains over 550 classes and over 2000 properties that can be used to represent the data aspects of insurance products, policies, agents, claims, agreements, and to support core insurance processes.

It is important to understand that the Pega Foundation for Insurance data model extends the Insurance Application Architecture (IAA) data model based on the Interface Design Model of the IBM IAA version 2006TR. The IAA data model provides any implementation with another data model to build off (i.e., if the Pega Foundation for Insurance model has not yet extended a specific object). Customizations to this model can be made as necessary to meet business needs by having a data class directly inherited from the corresponding IAA data class.

## Insurance sample data

Pega Foundation for insurance application package includes a library of fictitious sample data instances that can be leveraged to visualize and test different business

processes and rules in context. This data includes sample policies, customers (individuals and businesses), agents, and so on.

## Insurance object search and retrieval

Pega Foundation for insurance leverages Elastic Search and Search and Reporting (SRS) capabilities from the Pega Platform for fast look-up of code sets and sample data instances of policies, products, components, agents, customers, and so on that are maintained in the Foundation.

## Customer data management

The customer account management process provides a comprehensive view of the customer and includes the capabilities to: Create a new customer (either individual or business), view profile of an existing customer, or update details on an existing customer. Details of a customer profile like personal information, previous claim details, policy information, and customer activities, can be captured and displayed in a single unified view.



**Note:** PFI data model treats each contact (individual or business) as a customer.

**Search terms**

Search for

☒ Individual☐ Business

Last Name

First name

Contact ID

Postal code

Policy ID

[Clear](#)[Search](#)**Results**[Group](#) [Fields](#) [Density](#)[Refresh](#) [Default view](#) [v](#)

Last Name <a href="#">↑</a> <a href="#">v</a>	First name	Full address	Postal code	Date of birth	CONTACT ID
<a href="#">Adams</a>	<a href="#">Dana</a>	Columbus Avenue	02445	12/29/59	CONT-2478
<a href="#">Buten</a>	<a href="#">Jeff</a>	Shawmut Avenue	10128	5/28/69	CONT-2456
<a href="#">Dupond</a>	<a href="#">Claire</a>	23 Avenue des Ternes	75017	7/2/71	CONT-2481
<a href="#">Grenzmann</a>	<a href="#">Katrin</a>	Hermannstr. 13	56218	4/23/76	CONT-2486
<a href="#">Johnson</a>	<a href="#">Jim</a>	565 Seaver St. Apt.101	12118	9/16/48	CONT-29

*Customer data management*

## Agency data management

Beginning in Pega Foundation for Insurance 7, a new way to manage agents and agencies was implemented to provide a simple example of how you can easily manage data within the Pega Foundation for Insurance.

In Pega Foundation for Insurance, a landing page lets you manage the sample data of agents and agencies. You can navigate to this landing page by clicking **Configure > Framework Management > Tools > Agent/Agency Management**. Use this screen to search for or create an agent or an agency. The customer is expected to replace the agent and agency sample data by connecting to their existing Agency Management System.



## Agent/Agency Management

Create Agent

Create Agency

Close

## Search Terms

Search for ☒ Agent☐ Agency

First name

Last Name

Agent ID

Clear

Search

## Results

Last Name ▼	First name	Agent ID	Carrier Agency Code	ACTIVE
Wild	Michael	AGT-154	AGYDE001	true
Waltz	Christoph	AGT-153	AGYDE001	true
Tyner	Katie	AGT-78	MSSAGY001	true

*Agency management*

## Industry codes management

Pega Foundation for Insurance comes with standard code sets to support your enterprise applications and provides you the ability to upload and maintain other licensed code sets that are required in your business processes.

The Foundation contains pre-configured data tables to store industry classification codes that are used to classify companies based on their business activities and the industry they belong to:

- Standard Industry Classification (SIC) codes
- 2022 North American Industry Classification System (NAICS)

Above code sets are leveraged in Pega Insurance applications, including Pega Underwriting for Insurance (PUI), Sales Automation for Insurance (SAI), and so on.

## Integration data pages

Using data pages separates the interface (i.e., the source of the data) from the data model in your system. Data pages help retrieve data stored on any external system and in many scenarios, this data is required in processing a case.



To accelerate integrations with your systems of record, Foundation for Insurance provides pre-configured data pages for commonly referenced objects like Customers (Individuals and companies), Product, Policy etc. The Integration Manager portal from the App Studio's 'Data' navigation menu provides a comprehensive and interactive view to manage all the key data classes and integration rules related to APIs.

## Product Builder for Insurance

Product Builder for Insurance (PBI) is a flagship capability within Foundation for Insurance application that enables users to build and maintain insurance products and their associated components and act as a central repository of products for other functions like marketing, policy servicing, claims, and so on.

The guided, business-driven, and customer-oriented processes of Product Designer reduce the time to market, and product designers can configure insurance products that cater to various insurance types, market segments, and lines of business.

The list of components that can be created in Product Builder for Insurance:

- **Coverages:** The essential build blocks of products and used to define limits and deductibles
- **Endorsements:** To define optional coverages or riders
- **Forms:** To capture the broad description of the coverage and benefit
- **Eligibility:** To add product and component specific eligibility conditions
- **Questions:** To add product-specific questions that will appear dynamically
- **Variants:** To offer pre-defined product variants (e.g., Platinum, Gold)

For more information on how to use the Product Designer, see the [Product Builder for Insurance User Guide](#).

## Standard case types

The core case type that is built and maintained in Pega Foundation for Insurance is the Customer Case.

Case type	Description
Customer Case	Used to create and manage customer data

## Primary data entities

This section describes some of the key data types included in the Pega Foundation for Insurance object model which are widely leveraged across other Pega Insurance applications and stored in external systems or, where appropriate, internally in the Pega system.

Name	Description	System of Record (SOR)
Insurance Policy	Contains attributes to store insurance policy information	External
Party	Contains attributes to store information on parties in insurance contract e.g., agent, client	Pega or External
Customer	Contains attributes to store information on business units	Pega or External
Agent & Agency	Contains attributes to store information on agents or agencies	Pega or External
Claim	Overarching data object that contains attributes to store information on claims	Pega or External

Name	Description	System of Record (SOR)
Address	Contains attributes to store information on addresses of customers	Pega or External
Quote	Contains attributes to store information on an insurance quote like ID, premium, status etc.	Pega or External

## Roles, portals, and dashboards

Pega Foundation for Insurance provides the following roles, portals, and dashboards:

- [Access Roles](#)
- [Portals and dashboards](#)

### Access Roles

The following pre-configured access roles are provided for managing access to the business processes included in the Pega Foundation for Insurance.

Role	Description	Portal
Product Manager	End user role for Product Designer portal in PBI with privileges to view reporting dashboard and WITHOUT privileges to create or view products / components	Product Designer
Product Designer	End user role for Product Designer portal in PBI with privileges to view reporting	Product Designer

Role	Description	Portal
	dashboard and to create or view products / components	
Administrator	Overall manager role for Product Designer portal in PBI with privileges to create or view products / components and, view reporting dashboard	Product Designer

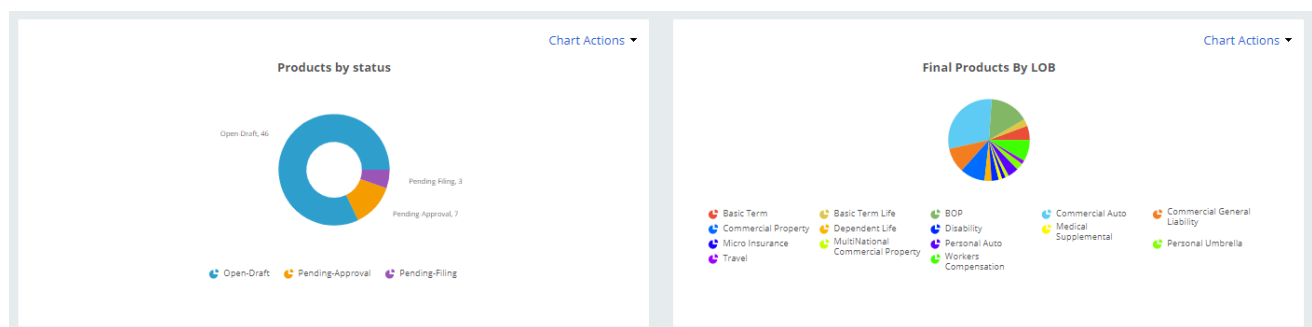
Name	Description	Portal
Broker/ Underwriter/ Work Manager/ Work User	End user role for Case Manager portal in PFI with privileges to create and manage insurance customers (Individuals and businesses) and WITHOUT privileges to create Agent or Agencies in developer portal	Case Manager
Administrator	Overall manager role for Case Manager portal in PFI with privileges to create and manage insurance customers (Individuals and businesses) and create Agent or Agencies in developer portal	Case Manager / Developer

## Portals and dashboards

Pega Foundation for Insurance provides the following pre-configured portals based on roles and applications. The portals include personalized dashboards and pre-configured charts, known as “widgets.”

The application provides a variety of widgets for users and managers. Dashboard personalization allows users to customize their dashboard view. New widgets can also be created to display key metrics unique to your business and persona.

- Case Manager
- Case Worker
- Product Designer



Dashboard

## Further reading

For more information about Pega Foundation for Insurance and to access supporting documents for the different application layers of the Foundation (e.g., data model, technical specifications, deployment, and business use case guides for Product builder for Insurance), see the Pega Foundation for Insurance [product](#) page.

# Install

- [Pega Foundation for Insurance '23 install guide](#)

## Pega Foundation for Insurance '23 install guide

- [Completing the prerequisite tasks](#)
- [Backing up your system](#)
- [Installing the application](#)

### Completing the prerequisite tasks

Before you install your application, ensure 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 the latest available release of Pega Platform '23, and ensure that you can log in as an administrator. For more information, see the *Pega Platform Install Guide* for your environment on the [Deploy Pega Platform page](#).

Patch releases are available through Pega's standard software delivery process. You can request software through Pega Software Distribution or by contacting GCS.



**Note:** If you are using Db2 9.7 or later, enable the Automatic REORG setting as described in the documentation provided with your database system. Set each of the following configuration parameters to ON: `auto_maint`, `auto_tbl_maint`, and `auto_reorg`.

**What to do next:**

Starting with Pega Foundation for Insurance 7.4, sample data is found in CustomerData schema (it was previously located in Sample schema). For steps to update the database table mapping rules in your application, see [Remapping sample data](#).

## Backing up your system

When installing or updating an application, back up your system after each step to ensure that you can revert to the last working version of the system if you encounter an issue.



**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 backup 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 files from your application server.



## Installing the application

To install Pega Foundation for Insurance, complete the procedures in this section.

Some existing case types included in the product might have been enhanced over past releases to conform with newer design patterns and requirements. These enhancements might lead to issues in the existing in-flight cases after the update has been completed. If you encounter these issues, override the required rules from previous versions of your implementation.

### Before you begin:

Complete the prerequisites for this installation. For information, see the "Completing the prerequisites" topic earlier in this guide.



**Note:** You can deploy Pega Foundation for Insurance as part of Pega Customer Service, as a stand-alone application alongside a third-party customer service solution, or you can embed it in a third-party customer service application. The installation process varies depending on your deployment option. For more information on the deployment options, see the *Pega Foundation for Insurance Implementation Guide* on the Pega Foundation for Insurance [product](#) page.

1. [Importing the application file](#)
2. [Optional: Importing the sample data](#)
3. [Optional: Enabling sample operator accounts](#)
4. [Configuring an email account](#)

## Importing the application file

The system data and rulesets for Pega Foundation for Insurance are loaded during this task.

1. Log in to Pega Platform ( `https://<hostname>:<port>/prweb` ) by entering the administrative ID and password that you used during Pega Platform installation, for example, `administrator@pega.com`.
2. In the header of Dev Studio, click **Configure > Application > Distribution > Import**.
3. Select the `Rules\PFI.jar` file from your distribution media, and then follow the wizard instructions.
4. For schema changes, depending on your site's requirements, select either **Automatic** or **Manual**, and then continue following the wizard instructions.

If you select **Manual**, see [Viewing and applying schema changes](#).

5. When the import is complete, click **Done**.
6. Apply the required hotfixes by using Hotfix Manager.  
For more information, see Pega Foundation for Insurance [hotfixes](#).
7. **Optional:** Verify the application rules.
  - a. In the navigation pane of Dev Studio, click **Records > Application Definition > Application**.
  - b. Confirm that the following application rule is displayed in the list:
    - `PegaInsurance8`

### Next topic:

[Optional: Importing the sample data](#)

## Optional: Importing the sample data

The distribution media includes sample data to help you explore the application capabilities. The sample data includes disabled sample operators that you can enable to learn about the workspaces for each operator role. Importing the sample data is



optional, and the sample data that is provided might not align with your business needs.



**Note:** You must install the Pega Foundation for Insurance sample data before installing the Pega Underwriting for Insurance or Customer Relationship Management for Insurance sample data.

### Before you begin:

Ensure that you have already imported the application file. For more information, see [Importing the application file](#).

1. In the header of Dev Studio, click **Configure > Application > Distribution > Import**.
2. Select the file from your distribution media.
3. Follow the wizard instructions to import the sample data.

### Previous topic:

[Importing the application file](#)

### Next topic:

[Optional: Enabling sample operator accounts](#)

## Optional: Enabling sample operator accounts

If you imported the sample data, operators are included that allow you to access the sample data. For security purposes, sample operators are disabled by default.

To enable the sample operators, complete the following steps.

1. In the header of Dev Studio, click **Configure > Org & Security > Authentication > Operator Access**.
2. In the Disabled operators section, select the check box next to the operator ID to enable.

3. Click **Enable** selected.

The **Enable Operator** dialog is displayed.

4. Click **Submit** to confirm that you want to enable the selected operator ID.
5. Click **OK** to close the dialog box.

**Previous topic:**

[Optional: Importing the sample data](#)

**Next topic:**

[Configuring an email account](#)

## Configuring an email account

You must customize the default `Email Account` rule by copying it to the class `PegaIns-Work` and modifying the settings on the rule form to identify your site's email server.



**Note:** If you do not customize the account settings to use your site's email server, flows such as, error handling using the correspondence rules fail.

1. Log in to the sample application as the `PBIVerificationSysAdmin` sample operator ID.
2. In the header of Dev Studio, click **Configure > Integration > Email > Email Accounts**.
3. Open the **Default** email account from the list.
4. On the **Email account settings** rule form, update the **Email address** and **SMTP Host** fields. Set the values according to your site. For more information, see [Exploring email configurations](#).
5. When prompted, enter an appropriate password.
6. After saving the rule, check the connection status.

**Previous topic:**

[Optional: Enabling sample operator accounts](#)



# Update and hotfixes

- [Pega Foundation for Insurance '23 Update guide](#)
- [Pega Foundation for Insurance hotfixes](#)

## Pega Foundation for Insurance '23 Update guide

- [Completing the prerequisite tasks](#)
- [Backing up your system](#)
- [Updating the application](#)
- [Updating to version 8.2 and later](#)
- [Updating to version 7.3 and later](#)
- [Update from versions 7.3 to 8.23](#)
- [Key changes that need attention during update](#)

## Completing the prerequisite tasks

Before you install update your application, ensure that you complete all of the following tasks.

1. Review the database policies and application permissions that are used by your Pega Platform update. 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. Update to the latest available release of Pega Platform '23, and ensure that you can log in as an administrator. For more information, see the *Pega Platform Update Guide* for your environment on the [Deploy Pega Platform](#) page.



Patch releases are available through Pega's standard software delivery process. You can request software through Pega Software Distribution or by contacting GCS.



**Note:** If you are using Db2 9.7 or later, enable the Automatic REORG setting as described in the documentation provided with your database system. Set each of the following configuration parameters to ON: `auto_maint`, `auto_tbl_maint`, and `auto_reorg`.

### What to do next:

Starting with Pega Foundation for Insurance 7.4, sample data is found in CustomerData schema (it was previously located in Sample schema). For steps to update the database table mapping rules in your application, see [Remapping sample data](#).

## Backing up your system

When installing or updating an application, back up your system after each step to ensure that you can revert to the last working version of the system if you encounter an issue.



**Important:** Importing the new version of the application can require the execution of column and declare-index population jobs. These jobs run in the background, populating the new columns and declare-indexes that are imported with the application, which requires the update of a large number of records. In PostgreSQL installations, this large-scale update of records can require additional temporary disk space, so ensure that there is enough disk space available for the database to expand accordingly.



**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 backup 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 files from your application server.

## Updating the application

To update Pega Foundation for Insurance, complete the procedures in this section.

Some existing case types included in the product might have been enhanced over past releases to conform with newer design patterns and requirements. These enhancements might lead to issues in the existing in-flight cases after the update has been completed. If you encounter these issues, override the required rules from previous versions of your implementation.

**Before you begin:**

Complete the prerequisites for this update. For information, see the "Completing the prerequisites" topic earlier in this guide.

1. **Dropping sample data**
2. **Importing the application file**
3. **Optional: Importing the sample data**
4. **Optional: Enabling sample operator accounts**
5. **Remapping sample data**
6. **Configuring an email account**
7. **Setting the version number of your built-on application in Pega**

## Dropping sample data

Before starting your update, contact your database administrator and drop the following tables from the PegaData and CustomerData schemas:



**Note:** When you import the latest JAR files, these tables are re-created with the required data.

PegaData schema:

- IIF\_AGENCY
- IIF\_AGENT
- PA\_CONTACT
- IIF\_QUESTIONS
- PR\_PEGAINSPROD\_INDEX\_PRODFORMS





CustomerData schema:

- IIF\_POLICY
- IIF\_POLICY\_LINK
- ORGANIZATIONS\_INS
- IIF\_POLICY\_LOBDATA
- P\_ADDRESS
- P\_CONTACT
- P\_CONTACTCONTACTREL
- P\_CONTACTORGREL
- P\_ORGANIZATION
- P\_ORGORGREL
- P\_ROLE

These tables are considered sample tables, and it is assumed that none of these tables are being used in the site-specific implementation. If any of these tables are being used to store implementation data, then create a backup of the data and restore it after the update.

**Note:** If you are updating from a version prior to Pega Foundation for Insurance 7.31, before you start your update, contact your database administrator and drop the IIF\_CAUSESOFLOSS table, which you can find in the PegaData schema.



- If this table was being used for storing implementation-specific data, create a backup of the data and restore it after the update.
- If this table was not being used to store any implementation-specific data, then a backup is not necessary because the product import installs the required sample data.



**Note:** If you are updating from a version prior to Pega Foundation for Insurance 8.2, before you start your update, contact your database

administrator and take backup of below tables, which you can find in the PegaData schema. And post update do import of the backup taken.

1. IIF\_POLICY
2. IIF\_POLICY\_LINK
3. ORGANIZATIONS\_INS
4. IIF\_POLICY\_LOBDATA

- If this table was being used for storing implementation-specific data, create a backup of the data and restore it after the update.
- If this table was not being used to store any implementation-specific data, then a backup is not necessary because the product import installs the required sample data.

### Next topic:

[Importing the application file](#)

## Importing the application file

The system data and rulesets for Pega Foundation for Insurance are loaded during this task.

1. Log in to Pega Platform ( `https://<hostname>:<port>/prweb` ) by entering the administrative ID and password that you used during Pega Platform installation, for example, `administrator@pega.com`.
2. In the header of Dev Studio, click **Configure > Application > Distribution > Import**.
3. Select the `Rules\PFI.jar` file from your distribution media, and then follow the wizard instructions.
4. For schema changes, depending on your site's requirements, select either **Automatic** or **Manual**, and then continue following the wizard instructions.

If you select **Manual**, see [Viewing and applying schema changes](#).



5. When the import is complete, click **Done**.
6. Apply the required hotfixes by using Hotfix Manager.  
For more information, see Pega Foundation for Insurance [hotfixes](#).
7. **Optional:** Verify the application rules.
  - a. In the navigation pane of Dev Studio, click **Records > Application Definition > Application**.
  - b. Confirm that the following application rule is displayed in the list:
    - PegaInsurance8

**Previous topic:**[Dropping sample data](#)**Next topic:**[Optional: Importing the sample data](#)

## Optional: Importing the sample data

The distribution media includes sample data to help you explore the application capabilities. The sample data includes disabled sample operators that you can enable to learn about the workspaces for each operator role. Importing the sample data is optional, and the sample data that is provided might not align with your business needs.



**Note:** You must install the Pega Foundation for Insurance sample data before installing the Pega Underwriting for Insurance or Customer Relationship Management for Insurance sample data.

**Before you begin:**

Ensure that you have already imported the application file. For more information, see [Importing the application file](#).

1. In the header of Dev Studio, click **Configure > Application > Distribution > Import**.

2. Select the file from your distribution media.
3. Follow the wizard instructions to import the sample data.

**Previous topic:**[Importing the application file](#)**Next topic:**[Optional: Enabling sample operator accounts](#)

## Optional: Enabling sample operator accounts

If you imported the sample data, operators are included that allow you to access the sample data. For security purposes, sample operators are disabled by default.

To enable the sample operators, complete the following steps.

1. In the header of Dev Studio, click **Configure > Org & Security > Authentication > Operator Access**.
2. In the **Disabled operators** section, select the check box next to the operator ID to enable.
3. Click **Enable selected**.  
The **Enable Operator** dialog is displayed.
4. Click **Submit** to confirm that you want to enable the selected operator ID.
5. Click **OK** to close the dialog box.

**Previous topic:**[Optional: Importing the sample data](#)**Next topic:**[Remapping sample data](#)

## Remapping sample data

Starting with Pega Foundation for Insurance 7.4, sample data is found in CustomerData schema (it was previously located in PegaData schema in version 7.31, and under Sample in versions prior to 7.31). If your implementation makes use of any



Pega Foundation for Insurance sample table that is part of a schema other than CustomerData and you need to continue using the other schema, then you must update the corresponding database table mapping rules.

**Note:** If your implementation makes use of your own classes and tables to store customer-related data, you do not need to complete this step. System of record changes in Pega Foundation for Insurance 7.4 will not affect your data.

updating to Pega Platform 7.4 and Pega Foundation for Insurance 7.4 brings in Pega Platform class and sample tables and their respective class-table mappings. If your implementation uses Pega Foundation for Insurance 7.4 classes and sample tables, you must map the classes back to the tables in Pega Foundation for Insurance 7.31 for the existing customer operations to work, or migrate data from the tables in Pega Foundation for Insurance 7.31 to the tables in Pega Platform 7.4.

To update the database table mapping, in Dev Studio, use the Records Explorer.

1. In the navigation panel of Dev Studio, click **Records > SysAdmin > Database Table**.
2. On the **Instances of Database Table** page, open a record in the list that corresponds to the class whose table mapping needs to be modified.
3. In the **Database** field, select the appropriate schema name and click **Save**.
4. Repeat steps 2 and 3 for each of the classes that require modification. If your implementation makes use of any of the Pega Foundation for Insurance 7.31 tables, store the data by using Pega Foundation for Insurance classes. For more information, see the following table.

Table name in Pega Foundation for Insurance 7.31	Class name in Pega Foundation for Insurance 7.31	Table name in Pega Platform 7.4	Class name in Pega Platform 7.4
PA_ADDRESS	PegaApp-Interface-Address	P_ADDRESS	PegaData-Address
PA_ADDRESSTYPE	PegaApp-Interface-AddressType	Columns merged in P_ADDRESS table	
PA_BUSINESSUNIT	PegaApp-Interface-BusinessUnit	P_ORGANIZATION	PegaData-Organization
PA_CONTACT	PegaIns-Interface-Contact	P_CONTACT	PegaData-Contact
PA_CONTACT_BUSINESSUNIT_LINK	PegaIns-Interface-BusinessUnitLink	P_CONTACT_ORG_REL	PegaData-ContactOrgRel
PA_COMMUNICATION_OPTIONS	PegaIns-Interface-Contact-CommunicationOptions	Columns merged in P_CONTACT table	
PA_ROLES	PegaApp-Interface-Roles	P_ROLE	PegaData-Role

Starting with Pega Foundation for Insurance 8.2, sample data is found in *CustomerData* schema (it was previously located in *PegaData* schema in version 8.1).

If your implementation makes use of any Pega Foundation for Insurance sample table that is part of a schema other than *CustomerData* and you need to continue using the other schema, then you must update the corresponding database table mapping rules.



**Note:** If your implementation makes use of your own classes and tables to store customer-related data, you do not need to complete this step. System of record changes in Pega Foundation for Insurance 8.6 will not affect your data.

To update the database table mapping, in **Dev Studio**, use the **Records Explorer**.

1. In the navigation panel of **Dev Studio**, click **Records > SysAdmin > Database Table**.
2. On the **Instances of Database Table** page, open a record in the list that corresponds to the class whose table mapping needs to be modified.
3. In the **Database** field, select the appropriate schema name and click **Save**.
4. Repeat steps 2 and 3 for each of the classes that require modification.

If your implementation makes use of any of the Pega Foundation for Insurance 8.1 tables, store the data by using Pega Foundation for Insurance classes. For more information, see the following table.

Table name in Pega Foundation for Insurance 8.1	Class name in Pega Foundation for Insurance 8.1	Table name in Pega Platform 8.6	Class name in Pega Platform 8.6
IIF_POLICY	Address-Interface-	P_ADDRESS	PegaData-Address
IIF_POLICY_LINK	PegaApp-Interface-AddressType	Columns merged in	

ORGANIZATIONS_IN S	PegaApp-Interface- BusinessUnit	P_ORGANIZATION	PegaData- Organization
IIF_POLICY_LOBDAT A	PegaIns-Interface-	P_CONTACT	PegaData-Contact

**Previous topic:**[Optional: Enabling sample operator accounts](#)**Next topic:**[Configuring an email account](#)

## Configuring an email account

You must customize the default Email Account rule by copying it to the class PegaIns-Work and modifying the settings on the rule form to identify your site's email server.



**Note:** If you do not customize the account settings to use your site's email server, flows such as, error handling using the correspondence rules fail.

1. Log in to the sample application as the PBIVerificationSysAdmin sample operator ID.
2. In the header of Dev Studio, click **Configure > Integration > Email > Email Accounts**.
3. Open the **Default** email account from the list.
4. On the **Email account settings** rule form, update the **Email address** and **SMTP Host** fields. Set the values according to your site. For more information, see [Exploring email configurations](#).
5. When prompted, enter an appropriate password.
6. After saving the rule, check the connection status.

**Previous topic:**[Remapping sample data](#)



**Next topic:**[Setting the version number of your built-on application in Pega](#)

## Setting the version number of your built-on application in Pega

Based on the type of update, you might need to set the version number of your built-on application. If you are performing a major update, for example, you are updating from version 7.x to version 8.x, set the version number of your built-on application so that you can use the latest features in Pega Knowledge.

1. In the header of Dev Studio, click **Application > Definition**.
2. In the **Built on applications** section, change the value in the **Version** field to the number of the updated version.

 **For example:**

23

3. Click **Save**.

**Previous topic:**[Configuring an email account](#)

## Updating to version 8.2 and later

Starting from Pega Foundation for Insurance 8.2, PegaApp, PegaSP, PegaFWUI and Pega-UITheme rulesets are not included in the application ruleset stack. When updating from a version prior to 8.2, you may see some issues because of this change.

The references to any rules defined in these rulesets have been mitigated by moving those rules into PegaInsure ruleset. This means that Pega Foundation for Insurance and other applications built on top of Pega Foundation for Insurance should work with no errors. However, in case where your application references one of the rules in these

rulesets, you get errors such as “Component Stack Mismatch”, “Wrong rule reference”, and so on. In such cases, your resolution is as follows:

Include the applicable PegaApp, PegaSP, PegaFWUI and Pega-UITheme ruleset in the application ruleset stack or remove the dependency on the rules by saving them into application ruleset or using replacements from the current version of the insurance application.

## Updating to version 7.3 and later

Starting from Pega Foundation for Insurance 7.3 below class keys got updated:

Rule-InsProd-Product

Rule-InsProd-Form

Rule-InsProd-Coverage

Rule-InsProd-Coverage-Endorsement

Because of the changes to class keys, these class instances would create issues post update.

Pega Foundation for Insurance providing an update utility to address these issues.

Utility saves the old instances with new class keys into preferred ruleset version and it removes old instances.

Perform the following steps before running the utility:

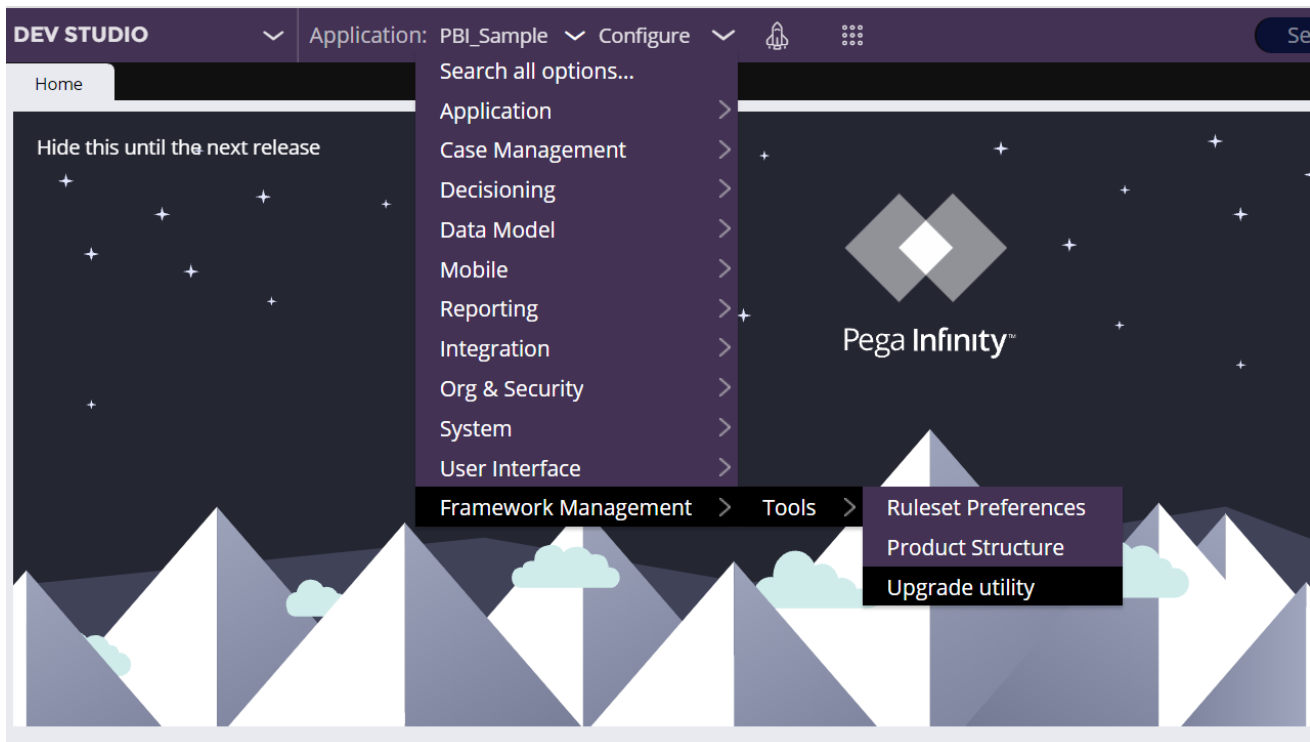
1. Keep a private checkout of *Rule-InsProd-.pyInstanceList* report definition. Update the RD to retrieve maximum number of records as per the required count. For example, 1000 (This is to fetch all Rule-InsProd- instances as input for the utility.)
2. Make sure the ruleset that hold Rule-InsProd- old instances is unlocked. i.e PBISampleData:01-01-01.

3. Optional- If there are no forms/endorsements/coverages in production. While upgrading product instances, seeing declare index insertion issue due to dependency on *pyWorkPage*.
4. We need to temporarily remove dependency on *pyWorkPage* for below 5 declare index rules
  - ProductCoverages
  - ProductEndorsements
  - ProductForms
  - ProductRISKCoverages
  - ProductRISKEndorsements

Changes include replace source property from *pyWorkPage.pxCreateOperator* to *pxRequestor.pxUserIdentifier* AND *pyWorkPage.pxCreateOpName* to *pxRequestor.pxUserIdentifier*.

Discard the above changes post run of upgrade utility.

The utility can be accessed as shown below.



Choose the destination ruleset and ruleset version to save the Rule-InsProd- instances post update.

Click on respective buttons to update Rule-InsProd- instances.

Important: Please refer to the PBI product upgrade guide before starting the upgrade process. It is meant to be a one time activity after the installation. Please follow the exact steps defined in help guide

Select a Ruleset and Ruleset Version to save your Product Component

Ruleset ★  
PBI SampleData ▾

Ruleset version ★  
08-06-02 ▾

Save

Upgrade forms Upgrade coverages Upgrade endorsements  
Upgrade products Upgrade product options

## Update from versions 7.3 to 8.23

Starting with Pega Foundation for Insurance 7.4, sample data is found in CustomerData schema (it was previously located in PegaData schema in version 7.31).

If your implementation makes use of any Pega Foundation for Insurance sample tables that is part of a schema other than CustomerData, then you must update the corresponding database table mapping rules as shown below.



**Note:** If your implementation makes use of your own classes and tables to store customer-related data, then you can skip this step.

Table name in PFI 7.31	Class name in PFI 7.31	Table name in PFI 8.8	Class name in PFI 8.8
PA_ADDRESS	PegaApp-Interface-Address	P_ADDRESS	PegaData- Address

Table name in PFI 7.31	Class name in PFI 7.31	Table name in PFI 8.8	Class name in PFI 8.8
PA_ADDRESSTYPE	PegaApp- Interface- AddressType	Columns merged in P_ADDRESS  table	
PA_BUSINESSUNIT	PegaApp- Interface- BusinessUnit	P_ORGANIZATI ON	PegaData- Organization
PA_CONTACT	PegaIns- Interface- Contact	P_CONTACT	PegaData- Contact
PA_CONTACT_BUSI NESSU NIT_LINK	PegaIns- Interface- BusinessUnitLin k	P_CONTORGRE L	PegaData- ContactOrgRel
PA_COMMUNICATIO N_OP TIONS	PegaIns- Interface- Contact- Communication Options	Columns merged in P_CONTACT  table	
PA_ROLES	PegaApp- Interface- Roles	P_ROLE	PegaData-Role

Please verify the database table rules for below classes. If it is not as per below mapping update them accordingly.

Class Name*	Table Name	Database Name	Name
PegaData-Organization	p_organization	CustomerData	PEGADATA-ORGANIZATION
PegaData-Contact	p_contact	CustomerData	PEGADATA-CONTACT
PegaData-Address	p_address	CustomerData	PEGADATA-ADDRESS
PegaData-Role	p_role	CustomerData	PEGADATA-ROLE
PegaData-OrgOrgRel	p_orgorgrel	CustomerData	PEGADATA-ORGORGREL
PegaData-ContactOrgRel	p_contactorgrel	CustomerData	PEGADATA-CONTACTORGREL
PegaData-ContactContactRel	p_contactcontactrel	CustomerData	PEGADATA-CONTACTCONTACTREL

*Database table rules*

## Key changes that need attention during update

- The parent class for below mentioned classes have been updated to a new class as shown below:

Class name	Old	New
PegaApp-Interface-	Work-Cover-	Data-
PegaApp-	Work-Cover-	@baseclass
PegaApp-Interface-Contact	PegaApp-	PegaApp-Interface-
PegaApp-Party-	PegaApp-	Data-Party
PegaApp-Party-Contact	PegaApp-Party-	Data-Party-Person
PegaApp-Party-BusinessUnit	PegaApp-Party-	Data-Party-Com
PegaApp-Work-	PegaApp-	Work-Cover-

If any of the above classes are being used in the implementation layer as per the old inheritance path and if new inheritance path is impacting your use case, save the old class structure to your implementation layer.

- Property level changes: Updated the properties having blank/custom control to appropriate OOTB control. Updated sections referencing these properties to leverage OOTB controls. Existing control rules are intact. If you observe any UI distortions or functional impact with above property level changes, please update the sections in your implementation layer accordingly.
- Addressed compilation issues during “re-validating and saving” of the Pega Foundation for Insurance application. As part of this process, few rules have been deprecated and withdrawn. For more information, see [Deprecated rules](#) list and [Withdrawn rules](#) list. If any of these rules are being used in the implementation layer and if you see a need to make this rule available, save the earlier version of the required rule, to the implementation layer.



# Pega Foundation for Insurance hotfixes

The following tables list required hotfixes the Pega® Foundation for Insurance application requires. To request a hotfix, go to your account on [My Support Portal](#). Click New request > For something I need and select Service request > Existing hot fix. Add and verify the hotfix details and click Finish.

Import each type of hotfix in the listed order during the Pega Foundation for Insurance installation or upgrade:

- Apply Pega Platform hotfixes immediately after the Pega Platform installation or upgrade.
- Apply Pega Foundation for Insurance and Product Builder for Insurance hotfixes just after you complete the application bundle import.

To see hotfix installation details, see the readme that is included in the hotfix.

- [Hotfixes for Pega Foundation for Insurance 8.x](#)
- [Hotfixes for Pega Foundation for Insurance 7.x](#)

## Hotfixes for Pega Foundation for Insurance 8.x

- [Pega Foundation for Insurance 8.6](#)
- [Pega Foundation for Insurance 8.5](#)
- [Pega Foundation for Insurance 8.4](#)
- [Pega Foundation for Insurance 8.3](#)
- [Pega Foundation for Insurance 8.2](#)
- [Pega Foundation for Insurance 8.1](#)



## Pega Foundation for Insurance 8.6

Required Pega Foundation for Insurance 8.6 hotfixes

Pega Platform Version	Hotfix Number	Observed Behavior
8.6	HFix-81782	This hotfix addressed the issue: Post upgrading from PFI 7.15 to 8.6 , rule instances created in 7.15 couldn't be opened.

## Pega Foundation for Insurance 8.5

Required Pega Foundation for Insurance 8.5 hotfixes

Pega Platform Version	Hotfix Number	Observed Behavior
8.5.4	HFix-81814	This hotfix addressed the issue: Agent ExpirationOfComponents in ruleset Pegalns-PBFW has been running for excessively long duration.
8.5	HFix-80211	Pega8.5.2Upgrade-Operator Profile Link not working. Old menu bar is upgraded to new one i.e. setting the property pyMenuFlag to "true".
8.5	HFix-68711	Localization issues fixed for few labels.



## Pega Foundation for Insurance 8.4

Required Pega Foundation for Insurance 8.4 hotfixes

Pega Platform Version	Hotfix Number	Observed Behavior
8.4.4	HFix-80854	This hotfix addressed that Pegalns-PBFW Agent will be correctly associated with the Access group PegalnsProduct:Administator.
8.4.3	HFix-67504	In Pega Foundation for Insurance 8.4, security has been enhanced on number of rules with inclusion of existing privilege "AllFlows".
8.4.2	HFix-81341	This hotfix addressed the Outbound email issue - SendEmailProcessor queue processor issue. As part of Hotfix, the activity from Framework application is withdrawn and the activity currently being used is from platform.
8.4	HFix-63569	Search indexing is failing due to the PrimaryCommunication key, which is not available in pa_communication_options table primary key constraint. Keys have been modified for

Pega Platform Version	Hotfix Number	Observed Behavior
		'PegaIns-Interface-Contact-CommunicationOptions' Class which is from PegaInsure Layer. 'Primary Communication' key is replaced with 'DateAdded' key.

## Pega Foundation for Insurance 8.3

Required Pega Foundation for Insurance 8.3 hotfixes

Pega Platform Version	Hotfix Number	Observed Behavior
8.3.6	HFix-81463	The error : No such Rule-Application instance: PegaInsProductVerify:8 was seen that for Pega Foundation for Insurance 8.53, the issue was addressed by this hotfix.
8.3	HFix-67567	In Pega Foundation for Insurance 8.3, security has been enhanced on number of rules with inclusion of existing privilege "AllFlows".
8.3	HFix-64565	Key mismatch error message is coming during test connectivity. The issue occurred as table has only one key and class has 2 keys. Modified the table to

Pega Platform Version	Hotfix Number	Observed Behavior
		include both case id and email token as keys.
8.3	HFix-64013	SendEmailNotification status failed even though the message "Message sent successfully" is seen. Additional if statement is included to only set the status if retval is not equal to "Message sent successfully".

## Pega Foundation for Insurance 8.2

Required Pega Foundation for Insurance 8.2 hotfixes

Pega Platform Version	Hotfix Number	Observed Behavior
8.2.8	HFix-68061	In Pega Foundation for Insurance 8.2, security has been enhanced on number of rules with inclusion of existing privilege "AllFlows".
8.2.1	HFix-54250	D_OFACSearch does not work. Activity name is updated in D_OFACSearch data page to fix the issue.
	HFix-57503	Incorrect behavior on refresh of local action assignment. Unchecked the option 'Disable Submit on

Pega Platform Version	Hotfix Number	Observed Behavior
		refresh' in the Work-pyWorkActionsPerform navigation rule for Refresh.
8.2	HFix-65835	Unable to share the article with Customer in Interaction Portal. Updated the rules to share KM articles via mail.

## Pega Foundation for Insurance 8.1

Required Pega Foundation for Insurance 8.1 hotfixes

Pega Platform Version	Hotfix Number	Observed Behavior
8.1.9	HFix-67856	In Pega Foundation for Insurance 8.1, security has been enhanced on number of rules with inclusion of existing privilege "AllFlows".
8.1	HFix-59749	OOTB class missing issue after upgrade. The missing classes were created and shipped as part of this fix.
	HFix-48864	User needs to see the list of documents sent to the claimant. Page list property created to hold the list of documents.

## Hotfixes for Pega Foundation for Insurance 7.x

- [Pega Foundation for Insurance 7.4](#)



- [Pega Foundation for Insurance 7.31](#)
- [Pega Foundation for Insurance 7.23.1](#)
- [Pega Foundation for Insurance 7.22](#)
- [Pega Foundation for Insurance 7.21](#)

## Pega Foundation for Insurance 7.4

Required Pega Foundation for Insurance 7.4 hotfixes

Pega Platform Version	Hotfix Number	Observed Behavior
8.1	HFix-48111	<p>Changes are required to address the following issues:</p> <ul style="list-style-type: none"> <li>• Unable to add attachments.</li> <li>• Unable to create a new application through App wizard.</li> <li>• Support Pega Claims for Insurance 7.31 for the built on version of Pega Foundation for Insurance 7.4.</li> </ul>
7.4	HFix-45824	Pega Foundation for Insurance prerequisite hotfix for Pega Underwriting for Insurance HFix-44663.
	HFix-44621	On upgrade to Pega Foundation for Insurance

Pega Platform Version	Hotfix Number	Observed Behavior
		7.4 from 7.31 the sample data import fails with error message "Database -Bad TableMapping - TooManyProperties".
	HFix-44320	When a Pega Claims for Insurance case is launched, the header is missing.

## Pega Foundation for Insurance 7.31

Required Pega Foundation for Insurance 7.31 hotfixes

Pega Platform Version	Hotfix Number	Observed Behavior
7.4	HFix-43584	Pega Foundation for Insurance prerequisite hotfix for Pega Underwriting for Insurance HFix-43583.
	HFix-41325	Location details are not getting auto-populated in Location Information screen in Pega Underwriting for Insurance.
7.3.1	HFix-41325	Unchecked limit values are appearing in Pega Underwriting for Insurance and update submission for renewals not working correctly.

Pega Platform Version	Hotfix Number	Observed Behavior
	HFix-42417	The Eligibility menu displays duplicate entries.

## Pega Foundation for Insurance 7.23.1

Required Pega Platform hotfixes for Pega Foundation for Insurance 7.23.1

Pega Platform Version	Hotfix Number	Observed Behavior
7.2.2	HFix-31078	<p>Changes are required to address the following issues:</p> <ul style="list-style-type: none"> <li>• AutoComplete do not display properly.</li> <li>• Fixing the regression bug that displays concurrent exception message.</li> </ul>

Required Pega Foundation for Insurance 7.23.1 hotfixes

Pega Platform Version	Hotfix Number	Observed Behavior
7.3	HFix-35582	<p>Changes are required to address the following issues:</p> <ul style="list-style-type: none"> <li>• Discounts do not display in the auto-complete field.</li> </ul>

Pega Platform Version	Hotfix Number	Observed Behavior
		<ul style="list-style-type: none"> <li>• Create and log off operator links do not work as expected.</li> <li>• Commercial property submission screens inappropriately display a gray-colored area.</li> </ul>
7.2.2	HFix-33544	<p>Important: The Customer Relationship Management for Insurance 7.22.1 release requires you to complete the installation of this hotfix before you install Customer Relationship Management for Insurance 7.22.1.</p> <p>Certain properties like churn risk are missing in the customer class resulting in errors/inconsistencies during import of unified sample data rap for insurance applications. This issue caused the incorrect population of marketing offers in Pega Customer Service for Insurance/Pega Sales Automation for Insurance.</p>




Pega Platform Version	Hotfix Number	Observed Behavior
	HFix-33676	<p>Important: The Customer Relationship Management for Insurance 7.22.1 release requires you to complete the installation of this hotfix before you install Customer Relationship Management for Insurance 7.22.1.</p> <p>The sample data rap released with Pega Foundation for Insurance 7.23.1 requires support for Pega Customer Service for Insurance 7.22.1, since Pega Customer Service for Insurance 7.22.1 unifies sample data for the entire insurance application suite.</p>
7.1.5	HFix-29465	Purge Archive keeps losing time and executes multiple times.

## Pega Foundation for Insurance 7.22

Required Pega Platform hotfixes for Pega Foundation for Insurance 7.22

Required Pega Platform hotfixes for Pega Foundation for Insurance 7.22



Pega Platform Version	Hotfix Number	Observed Behavior
7.2.2	HFix-31078	<ol style="list-style-type: none"> <li>1. AutoComplete does not display properly.</li> <li>2. Fixing the regression bug that displays concurrent exception message.</li> </ol>
	HFix-29436	Changes are required in order to install Pega Foundation for Insurance 7.22 on servers already running Pega Claims for Insurance 7.12. A Non-Automatic Data Definition Language (DDL) change in the pa_rating table blocks the installation.
7.2.1	HFix-29108	<p>Wrong descriptions of the case type show in the other actions menu.</p> <div>  <p><b>Note:</b> This hotfix must be applied after you apply HFix-28180.</p> </div>
	HFix-29109	<ol style="list-style-type: none"> <li>1. AutoComplete does not display properly.</li> </ol>

Pega Platform Version	Hotfix Number	Observed Behavior
		<ol style="list-style-type: none"> <li>2. Fixing the regression bug that displays concurrent exception message.</li> </ol>
7.2	HFix-26747	<ol style="list-style-type: none"> <li>1. AutoComplete does not display properly.</li> <li>2. Fixing the regression bug that displays concurrent exception message.</li> </ol> <div> <p><b>Note:</b></p> <ul style="list-style-type: none"> <li>• This item is available in the Updates folder of the Pega Foundation for Insurance application bundle.</li> <li>• This hotfix must be applied after you apply HFix-27096, HFix-27261,</li> </ul> </div>

Pega Platform Version	Hotfix Number	Observed Behavior
		and HFix-27269.
	HFix-28147	Wrong descriptions of the case type show in the other actions menu.  Note: This item is available in the Updates folder of the Pega Foundation for Insurance application bundle.

Required Product Builder for Insurance 7.22 hotfixes for Pega Foundation for Insurance 7.22

Pega Platform Version	Hotfix Number	Observed Behavior
7.2.2	HFix-30534	UDF Issue in PBI Application - Pending WorkObjects are not displayed.
7.2.1	HFix-30534	UDF Issue in PBI Application - Pending WorkObjects are not displayed.

Required Pega Foundation for Insurance 7.22 hotfixes

Pega Platform Version	Hotfix Number	Observed Behavior
7.2.2	HFix-29585	User is unable to create a new Customer through “Customer management”.
	HFix-35982	The IsInPagelist function [PegaInsure ruleset] generates a large volume of errors which quickly fills the Pega Platform error log.
	HFix-38272	The declare expression rule, Work-.pxUrgencyPartyTotal, which is used to calculate the Service Level Agreement (SLA) for all work parties, is broken.
7.2.1	HFix-35982	The IsInPagelist function [PegaInsure ruleset] generates a large volume of errors which quickly fills the Pega Platform error log.
	HFix-38272	The declare expression rule, Work-.pxUrgencyPartyTotal, which is used to calculate the Service Level Agreement (SLA) for all work parties, is broken.
7.2	HFix-35982	The IsInPagelist function [PegaInsure ruleset] generates a large volume of

Pega Platform Version	Hotfix Number	Observed Behavior
		errors which quickly fills the Pega Platform error log.
	HFix-38272	The declare expression rule, Work-.pxUrgencyPartyTotal, which is used to calculate the Service Level Agreement (SLA) for all work parties, is broken

## Pega Foundation for Insurance 7.21

Required Pega Foundation for Insurance 7.21 hotfixes

Pega Platform Version	Hotfix Number	Observed Behavior
7.2.1	HFix-28305	Tab alignment is not as per action area border.

# Implement

- [Pega Foundation for Insurance Implementation guide](#)

## Pega Foundation for Insurance Implementation guide

- [Overview](#)
- [Preparing for implementation](#)
- [Creating new application](#)
- [Case type configuration](#)
- [Data types](#)
- [Connecting system of record](#)
- [Managing reference data](#)
- [Implementing work classes or case types](#)
- [Application configurations](#)
- [Features implementation](#)

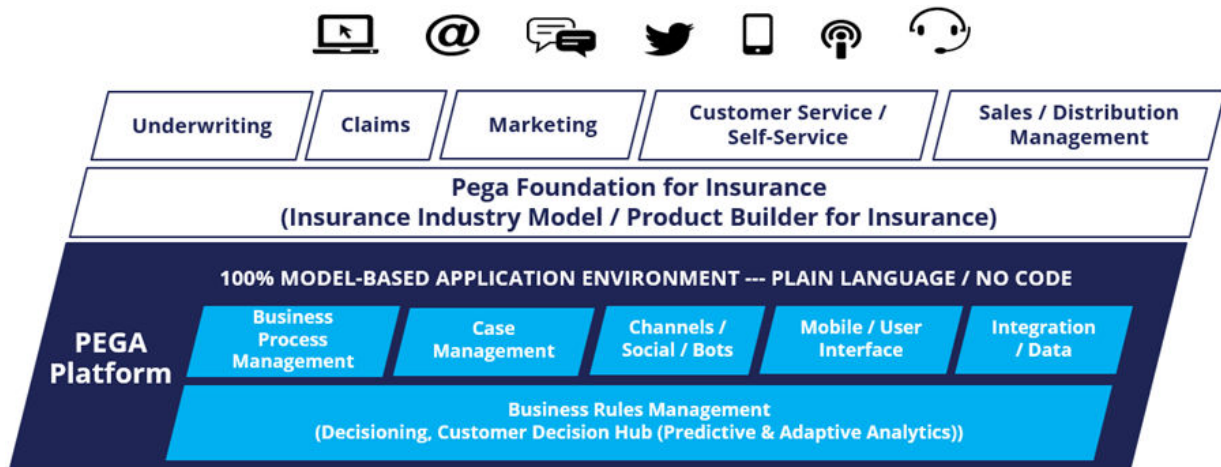
## Overview

Pega Foundation for Insurance (PFI) is an enterprise foundation that offers reusable assets which are broad, industry-standard and compliant to enable customers and consuming applications to focus on their core business aspects and rely on foundation to cover the fundamental needs of Insurance applications. These assets empower customers to rapidly configure and deploy SmartBPM™ and CRM solutions that deliver productivity, reduce costs, spur growth, and ensure compliance.



Some of the key benefits of implementing Foundation for Insurance include:

- Pre-configured industry-standard data model - IBM's Insurance Application Architecture (IAA)
- Inbuilt functionality to manage customer, policy, and agent data
- Enterprise-grade functionalities to build and maintain insurance product portfolio
- Bridges the gap between having to choose a COTS product and building from scratch
- Ability to leverage capabilities from underlying Pega platform - Intelligent automation, real-time decisioning, low-code usability, and so on.



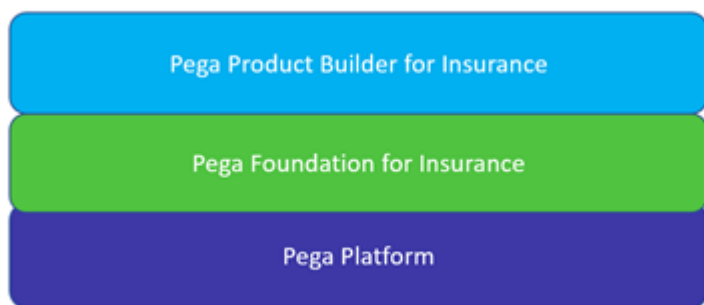
*Application Overview*

- **Pega Product Builder for Insurance application stack**

## Pega Product Builder for Insurance application stack

Pega Product Builder for Insurance (PBI) application is built on top of Pega Foundation for Insurance (PFI) application. The following application stack is for Product builder for Insurance (PBI) application.





*Application stack*

**Pega Foundation for Insurance (PFI):** It provides the necessary building blocks to accelerate implementation and is used as the foundation for most of our insurance applications. Foundation comprises of data model, sample data, data pages, customer and agency management and is the key offering in our insurance stack.

**Product Builder for Insurance (PBI):** Product Builder for Insurance is a separate application that is bundled with Pega Foundation for Insurance and replaces Product Configuration Application. With PBI, insurers can rapidly build and maintain insurance components or products and adapt to changing business needs or market conditions. It offers centralized product definition with business-driven and customer-oriented guided processes.

- **Application rules**
- **Object model and data classes**

## Application rules

Application rules define an ordered set of rulesets and versions that together identify the parts of an application layer. In addition, application rules relate an application's objectives, use cases, requirements, and actors to cases that are created as part of the Direct capture of objectives capabilities.

You can view a list of the application rules and their rulesets that form the application from the Dev Studio by selecting the **Configure > Application > Structure > RuleSet** stack landing page.

The RuleSet Stack tab displays the high level ruleset stack for each application rule defined in the application. Expand an application to list its rulesets. To see the Ruleset stack for the Pega Platform foundation layer, click + and - icons displayed next to the application to display and hide the ruleset list.

The application name and version for Pega Foundation for Insurance is *PegaInsurance:8*. Pega Foundation for Insurance application is built directly on top of *PegaInsurancePrerequisites* which is built on Pega Platform (PegaRULES application)

- **Rulesets**

## Rulesets

The PegaInsurance application consists of the following rulesets, which contain:

- **PegaInsure** –Core rules for the Pega Foundation for Insurance application.
- **PegaIns-Product** –Core rules for the Product Builder for Insurance application. Product Builder for Insurance is a separate application that is bundled with Pega Foundation for Insurance. Product Builder for Insurance enables the end user to design insurance products. It replaces Product Configuration Application.
- **Piif** –Classes and rules that support the Insurance Application Architecture (IAA) data model.
- **PegaInsure-Int** –Integration rules, primarily for integrating to the Policy class (PegaIns-Interface-InsurancePolicy).
- **IIFUI -UI** type (images, harnesses, portals, and skins) rules that are specific to insurance applications.
- **IIFAPI** –Rules that support the APIs published for the Pega Foundation for Insurance application.

- **PegaInsureAppGuide** –Rules specific for application guide purpose, helping the implementation team to go over the steps needed after installing Pega Foundation for Insurance.
- **ComponentSearch** –Rules that are specific for searching the products, components and other data elements in Product Builder for Insurance using Elastic Search.
- **RadarChart** –Rules that are required for displaying the radar chart.

## Object model and data classes

The most important part of Pega Foundation for Insurance application is object model which is the baseline for all of our Insurance applications. The Pega Foundation for Insurance object model is built using standard Pega Platform data classes and starts with *PegaIns-Data-class*.

A later section of this document includes a more detailed explanation of some of the core objects that Pega Foundation for Insurance model provides. To navigate through the data model, there are out-of-the-box Pega Platform tools to help find local properties and classes (objects).

## Preparing for implementation

A project team that implements a Pega application uses this implementation guide to enable and extend application features to meet client business requirements. Complete the product installation before starting the implementation procedures. For information about installing your application, see the product installation guides on the [Pega Foundation for Insurance](#).

This implementation guide presents tasks in the sequence in which they are commonly performed; however, the sequence varies based on business priorities. Follow the procedures in this guide to complete the tasks for the first minimum lovable product (MLP) release. Also, use this guide during iterative releases as you configure and extend more features on top of the MLP release.

## Prerequisites

Before you start your Pega Foundation for Insurance deployment, ensure that you understand the support for various browser versions. See the [Pega Infinity Platform Support Guide](#).

Before you create the baseline application, be sure that you install and test Pega Foundation for Insurance. See the Pega Foundation for Insurance Installation Guide on Pega Foundation for Insurance [product](#) page.

## Creating new application

In this stage, the implementation teams build out the foundation or baseline of the application and prepare for the work that is necessary to configure the first production release and subsequent extension releases. Building a strong foundation to support expansion and reuse is core to the success of an implementation.

- [Creating the baseline application](#)
- [Creating the implementation application only](#)
- [Operators, access groups, and portals](#)
- [Work parties](#)
- [Loading sample data](#)

## Creating the baseline application

Before you create the baseline application, be sure that you install and test Pega Foundation for Insurance. See the [Pega Foundation for Insurance installation guide](#) on the [Pega Foundation for Insurance](#) product page.

Use the Application Wizard to create a new application built on Pega Foundation for Insurance. The wizard creates the application structure for you.



In some cases, an organization that consists of multiple companies or entities requires multiple applications to vary the features based on the business needs of each company or entity. If your application features are the same throughout your organization, create an implementation application only. If your application features vary for different parts of your organization, first create a framework enterprise application that contains the features that are common to all parts of the organization. Then, create an implementation application for each variation that your organization requires. When using a framework application, build the implementation applications on top of the framework application so that they inherit common rules from the framework application.

## Creating the implementation application only

Pega systems recommends that you extend from the PegaIns foundation application and include the optional applications (listed in the Application rules section earlier) in your application rule based on your envisioned solution.

Finally, if you are creating a new application leveraging one of the Pega Insurance applications (For example, Customer Service for Insurance, Underwriting for Insurance, Claims for Insurance and so on), you can skip this step and create your baseline application by following the steps included in the implementation guide of the said insurance application.

## Operators, access groups, and portals

- [Creating system administrator accounts](#)
- [Portals](#)

## Creating system administrator accounts

The core system administrator account for Pega Foundation for Insurance is IIFSysadmin. You must install the sample jar to have access to this account. You must enable the operator and provide a password (You can follow this convention for

password: install or install12345!) Only after enabling you will be able login with that user.

If the sample jar is not installed, you need to create an administrator user ID. This administrator user ID can be copied from administrator@pega.com or another administrator account in your application. After creating the operator ID, ensure that the access group is modified to use Pegalnsure:SysAdmin.

## Portals

All access groups for end users use the Case Manager portal (pyCaseManager7).

The Pega Foundation for Insurance has extended the portal to include additional functionality such as a quick link on the left to access customer management.

## Work parties

Work party rules define which participants (roles) can be associated with a work object. Each work object can contain many roles in addition to the required originator role. Some roles may participate with multiple occurrences. This rule also controls how and whether users can add parties using the user forms.

The Pegalnsure layer (ruleset) uses the “Default” work party rule to configure work parties for various insurance processes. You can open the Default rule in the class of interest to see how the work parties have been configured for the class.

For example, the preconfigured work parties for the commercial application process are:

- Applicant
- Originator
- Policyholder
- AuthorizedParty
- Broker
- Underwriter



- Interested
- Agency

The Pega Foundation for Insurance includes example work party rules for personal lines, commercial lines, and individual and group application cases. These also provide backward compatibility for the pre 7.1 functionality of the Pega Foundation for Insurance.

## Loading sample data

Pega Foundation for Insurance provides sample data to support the Pega-provided demonstration application. It is recommended that customer-supplied sample data be loaded so that the gap analysis efforts are more meaningful for the client.

For more information, see [Importing the sample data](#) in the *Pega Foundation for Insurance Installation Guide* on the Pega Foundation for Insurance product page.

- [Sample data](#)

## Sample data

Sample data is installed with the application for testing purposes. Pega Foundation for Insurance uses sample data to represent its party data. This sample party, or contact data, is stored in the external database tables provided by the platform SOR.

The application also provides sample data for policies and endorsements to those policies (policy transactions). This data is stored in external database tables.

Table name	Description
IIF_POLICY	Primary table to store insurance policy information
IIF_POLICY_LINK	Stores relationships between insurance policies, contacts and the roles the contacts have in the policy

Table name	Description
P_ROLES	Stores role information for policy, contact, and business unit associations
P_CONTACT	Primary table to store information about contacts
P_ADDRESS	Stores address information about contacts and business units
P_ORGANIZATION	Stores information about business units
INSPRODUCT_RULES	Stores rule instances of product components viz. product, coverage, endorsements, and forms
P_CONTACTORGREL	Stores relationships between a contact and a business unit

The Pega Foundation for Insurance provides sample data such as contacts and business units that you can use to test different types of processes. During the install, this data is loaded into the sample database tables. Details are provided below. Note that this is not the entire list of sample data packaged with the application. There are additional contacts, agencies, agents, and so on. Also, the sample policies shipped are the ones created using Product Builder for Insurance and not using the Product Configuration application.

- [Sample contacts](#)
- [Sample business units](#)
- [Sample agency](#)
- [Sample agents](#)
- [Sample policies](#)



## Sample contacts

Name	Address	Email ID
Natalie Song	1000 Washington St. Boston, MA 02118	nsong@test.com
Wade Jones	100 Long Hill Dr Stamford, CT 06902	wjones@test.com

## Sample business units

Name	Address	Phone number
Buten Bearings	246 McAllister St. Boston, MA 02114	617 204-0002
Chunky's Cheeseburgers	1 Rogers St. Cambridge, MA 02142	617 555-4576
Kraft Enterprises	1 Patriot Pl. Foxboro, MA 02139	

## Sample agency

Name	Address	Email ID
A1 Insurance Agency	101 Main St. Cambridge, MA 02144	617-555-1234

## Sample agents

Name	Address	Email ID
Ashley Jones	101 Main St. Cambridge, MA 02144	ajones@a1insurance.com

Name	Address	Email ID
Carl Johnson	101 Main St. Cambridge, MA 02144	cjohnson@a1insurance.com

## Sample policies

Policy ID	Policy type	Policy holder
CP1537574580	Commercial Property	Buten Bearings
GL1515593623	General Liability	Buten Bearings
CPP1537578257	Commercial Package	Kraft Enterprises
CA1537578894	Commercial Auto	Chunky's Cheeseburgers
WC1537579502	Workers Compensation	Kraft Enterprises
PA1537576504	Personal auto	Natalie Song
PA1394062104	Personal auto	Wade Jones
UM1537577243	Personal umbrella	Wade Jones

## Case type configuration

As a Foundation, your application does not include any predefined Insurance case types, except the Customer Management case. A case is defined as a service case or a service request, which is a process that your organization runs to service your customers. For more information on defining case types, see [Implementing case types](#).

## Data types

Data modeling involves relating a conceptual model of how data items relate to each other in an application. The data model in the Pega Platform refers to a set of rules that work together to populate the data in your application. This data is displayed on the user interface to help the user process the case and can help automate decisions in

your business processes. For information on defining the data model, see [Data modeling](#).

The application data types provide a default set of properties for your use. You can add or remove properties from these data types depending on your requirements. You can also add new data types. For more information, see [Mapping the application data](#).

The Pega Foundation for Insurance data Model (the classes that are built in the *PegaIns-Data-*) is used to support core insurance processes. When you explore the model you can see that some of the data classes inherit from other data layers. The three other models that Pega Foundation for Insurance leverages are:

- [Pega SOR Data Model](#)
- [Insurance Application Architecture \(IAA\) Data Model](#)
- [Pega Foundation for Insurance data model](#)
- [Data classes](#)
- [Policy data classes](#)
- [Inheriting from PegaIns-Data-Structure](#)

## Pega SOR Data Model

The Pega SOR Data Model is a shared layer, common across other Pega Applications. The Pega Foundation for Insurance model leverages this model when appropriate. Pega SOR provides the baseline for the sample customer data model and for other external tables in the PegaData- classes defined as part of Pega-SharedData ruleset.

## Insurance Application Architecture (IAA) Data Model

The IBM insurance application architecture (IAA) provides an architectural framework for the development of application solutions for the insurance industry. Insurance-specific objects defined in the Pega Foundation for Insurance model, such as a vehicle,

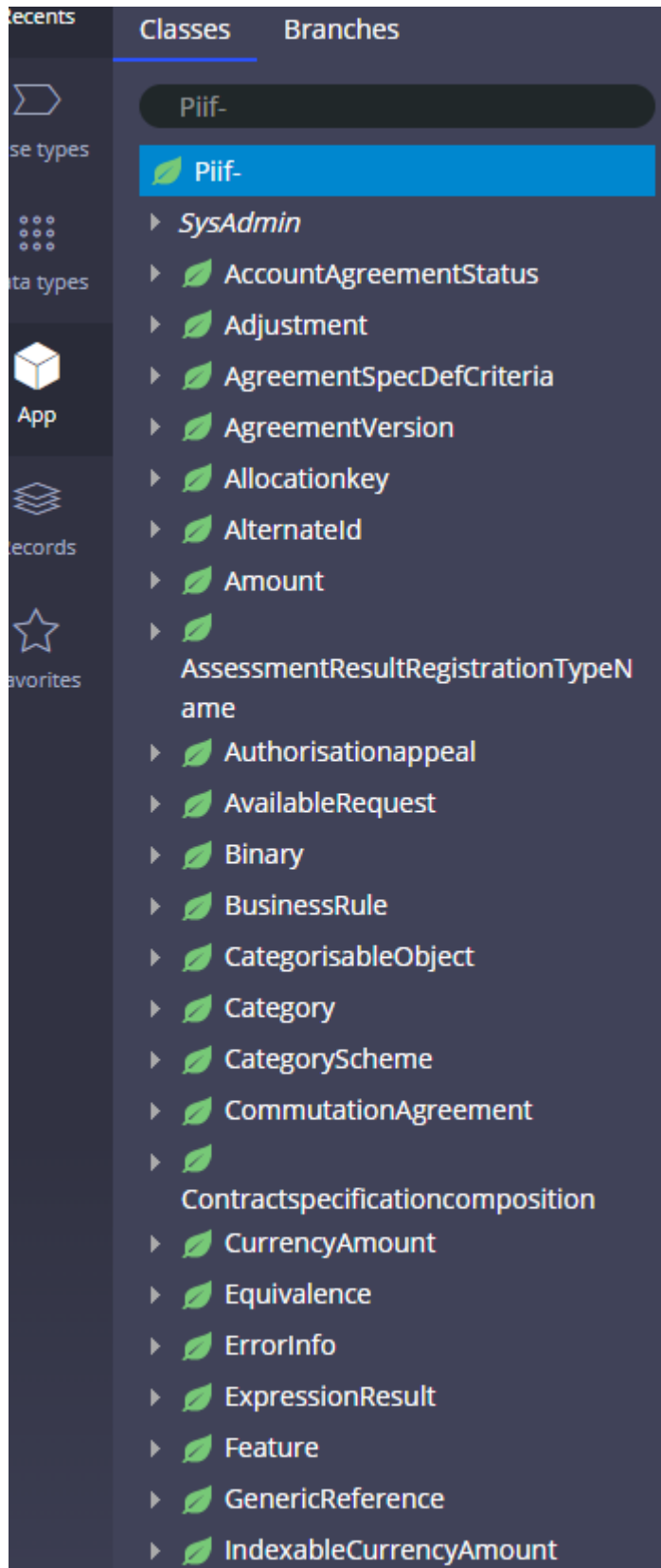
are built by extending the IAA data model. So that customers can utilize the industry standard data model for their implementations. It is important to understand that the IAA model provides the Pega Foundation for Insurance model acceleration and can also provide your implementation with another data model to build off (i.e., if the Pega Foundation for Insurance model has not yet extended a specific object).



*IAA Design Pattern*

The Piif class and its children provide the foundation data structures of the application. It contains over 550 classes, and over 2,000 properties that can be used to represent the data aspects of insurance products, agreements, and life-cycle processing.

As you customize the application to meet the needs of your own environment, you can leverage the Piif class by having your data classes directly inherit from the corresponding Piif class and then making customizations as necessary to meet your business needs.



IAA Data Model

For example, the insured vehicle component defined by Pegains-Data-PolCmp-InsuredVehicle is built by leveraging the Piif-CarModel class from the IAA model.

Please find the inheritance path for the "Insured Vehicle" in the image.

1	Pegains-Data-PolCmp-InsuredVehicle Insured Vehicle	Pattern
2	Pegains-Data-PolCmp-	Pegains-Data-PolCmp- Pattern
3	Pegains-Data-	Data Class for storing all components Pattern
4	Pegains-	Pegains- Directed
5	Piif-CarModel	Car model Directed
6	Piif-RoadVehicleModel	Road vehicle model Directed
7	Piif-VehicleModel	Vehicle model Directed
8	Piif-ModelSpecification	Model specification Directed
9	Piif-BusinessModelObject	Business model object Directed
10	Piif-CategorisableObject	Categorisable object Directed
11	Piif-	Inheritance base for IIF internal insurance data structures Directed
12	Data-	Data- classes Directed
13	@baseclass	@baseclass NA

#### *Inheritance*

In this image, all the IAA standard data model classes built under "Piif- "

Many Insurance specific objects defined in the Pega Foundation for Insurance (Pegains-Data-\*) such as vehicle, are built by extending the IAA data model.

Implementations on top of PFI can extend and utilize IAA data model classes if the class is not already being extended in PFI data classes.

When exploring the Pega Foundation for Insurance object model, you should check if there is an object in the Piif Classes that you need to extend. In '23, you can easily do this using the data model tools described previously or just by clicking App in the navigation panel of Dev Studio and using the autocomplete feature to search for a keyword.

### **PFI Data Model**

Please refer to PFI Data model image to navigate in the designer studio and pick the class required for the implementations.

### **IAA Data Model**



Please refer to PFI Data model image to navigate in the designer studio and pick the class required for the implementations.

Implementations can utilize the IAA data model directly from the PIIF classes and build the solutions.

## **Pega Foundation for Insurance data model**

Implementations on top of PFI can extend and utilize IAA data model classes if the class is not already being extended in PFI data classes. When exploring the Pega Foundation for Insurance object model, you should check if there is an object in the Piif classes that you need to extend.

Note that the **PegaIns-Data-** class structure is set up to inherit from the Piif class structure (IAA) to provide access to the many properties provided in the Piif layer. The sub classes under **PegaIns-Data-** point to a Piif class to get maximum reusability.

Refer to PFI data model image below to navigate in the designer studio and pick the class required for the implementations.



PFI Data Model



## Data classes

Data classes define the data structures for supporting information that the application uses to process work.

As described in previous sections, the data structure in Foundation for Insurance is based on the Interface Design Model of the IBM IAA data model 2006TR, with one exception: the application also leverages the extensive party classes and associated rules of Pega Platform. The Pega Platform party classes are organized into subclasses, with each new class directly inheriting from their Piif equivalent. This provides direct access to both Pega Platform and Piif party properties.

PegaIns-Data- <class> structure provides the data classes and all the data classes that appear under the Data explorer are defined in the cases & data tab of the PegaInsurance application rule. You can add or delete the data types based on the application or the built-on-application relevance and requirement

The following table lists the data classes and information that those classes represent.

Data representing	Class
Agency line of business: Contains the list of LOBs that an agency is licensed to sell in each region.	PegaIns-Data-AgencyLOB
Application data for lines of business: Represents a general application data work object specialized by its LOB.	PegaIns-Data-Application-Comm-Property PegaIns-Data-Application-Comm-GL PegaIns-Data-Application-Life PegaIns-Data-Application-Pers-Auto PegaIns-Data-Application-Pers-Umbrella

Data representing	Class
<p>Policy types: It is specialized by its subclasses that represent lines of business (LOB) and product groups, like the class structure in Pegalns-PAB-Work-</p>	<p>Pegalns-Data-InsurancePolicy-Commercial-GL</p> <p>Pegalns-Data-InsurancePolicy-Commercial-Property</p> <p>Pegalns-Data-InsurancePolicy-Life</p> <p>Pegalns-Data-InsurancePolicy-Personal-Automotive</p> <p>Pegalns-Data-InsurancePolicy-Personal-Umbrella</p>
<p>Submission data for lines of business: Represents a general submission data work object. It is specialized for various LOBs specific submission data.</p>	<p>Pegalns-Data-Submission-Com</p> <p>Pegalns-Data-Submission-Life</p> <p>Pegalns-Data-Submission-Pers-Auto</p> <p>Pegalns-Data-Submission-Pers-Umbrella</p>
<p>Definition of policy components: Contains several subclasses that represent components in a product. These classes are used when defining product and component rules in the Product Builder for Insurance application. Subclasses defined here inherit from the Piif class structure to take advantage of the many insurance properties provided by IAA – IBM's Insurance Application Architecture.</p>	<p>Pegalns-Data-PolCmp</p>

Data representing	Class
Represents the underwriting data captured for various lines of business	PegaIns-Data-Underwriting-Life  PegaIns-Data-Underwriting-Pers-Auto  PegaIns-Data-Underwriting-Pers-Umbrella
Customer data for insurance work types: Represents the customer information, either individual or business. Captures information such as address, communication options, and personal information.	PegaIns-Data-Customer
Represents the parties involved in an insurance agreement	PegaIns-Data-Party-Person  PegaIns-Data-Party-Person-Agent  PegaIns-Data-Party-Operator  PegaIns-Data-Party-Org-Company  PegaIns-Data-Party-Org-Agency
Quotes: Represents the estimated premium amount for an applicant based on several factors including the type of insurance, coverage amount, length of coverage, age, gender, health, and medical history, family history, build, and approximate rating class. Then, the selected quote is proposed for policy issuance.	PegaIns-Data-Quote
Represents the hazard codes by Standard Industry Classification (SIC) codes	PegaIns-Data-HazardCodes

Data representing	Class
	PegaIns-Data-SICCode  PegaIns-Data-SICDivision  PegaIns-Data-SICFactor  PegaIns-Data-SICGroup
Captures the previous carrier insurer information such as policy number and the effective and expiry dates.	PegaIns-Data-PriorCarrier
Captures the previous claims filed with carriers.	PegaIns-Data-PriorClaim
Captures vehicle information such as make, model, annual mileage, and vehicle use.	PegaIns-Data-VehicleInfo

## Policy data classes

It is important to understand how Pega Foundation for Insurance defines a policy and how it integrates with the sample policy tables. An insurance policy in Pega Foundation for Insurance is based on the PegaIns-Data-InsurancePolicy class. This is the internal representation of the policy object. Each line of business has its own class for specific extensions for a core policy. For example, all policies share header-level information such as effective date and policy number. But some lines of business need additional information such as vehicles and buildings.

Following Pega best practices, the application uses the policy data model to represent a policy and defines the pages, properties, and lists that are used to display data about a policy. Pega Foundation for Insurance also has a sample policy table that is used to persist policies to a database table to represent an example customer system of record. The IIF\_POLICY table has some exposed columns for header-level policy data, but it also has a BLOB column that represents the details of the policy.

The properties defined in the *PegaIns-Interface-InsurancePolicy* class are mapped to the exposed columns, but the *PolicyData* page, which is the Pega Foundation for Insurance object model for the policy, is stored as part of the BLOB.

This structure is different from the pre-Pega Foundation for Insurance 7.1 policy structure which was defined using Product Configurator application. For this reason, the **Policy List** tab of the MCA work object for a customer does not display policy details (i.e., coverage information) for policies created using the Product Configuration model. Coverage details are displayed only for those policies created using the Product Builder for Insurance application and for those policies that adhere to the policy structure defined above.

The classes in *PegaIns-Data-PolCmp* provide many of the common elements required to create products and their associated components.

## Inheriting from *PegaIns-Data-Structure*

The *PegaIns-Data-* class structure is set up to inherit from the *Piif* class structure (IAA) to provide access to the many properties provided in the *Piif* layer. The sub classes under *PegaIns-Data-* point to a *Piif* class to get maximum reusability.

The *Piif* class and its children provide the foundation data structures of the application. It contains over 550 classes, and over 2,000 properties that can be used to represent the data aspects of insurance products, agreements, and life-cycle processing.

The structure is based on the Interface Design Model of the IBM IAA version 2006TR with one exception: the application also leverages the extensive party classes and associated rules of Pega Platform. The Pega Platform party classes are organized into subclasses, with each new class directly inheriting from their *Piif* equivalent. This provides direct access to both Pega Platform and *Piif* party properties.

As you customize the application to meet the needs of your own environment, you can leverage the *Piif* class by having your data classes directly inherit from the

corresponding Piif class and then making customizations as necessary to meet your business needs.

The structure can also inherit from the Pegalns-Data-PolCmp classes. These classes provide many of the common elements required to create products and their associated policies.

They typically aggregate multiple Piif classes to provide more generic objects than using Piif alone.

The Pegalns-Data- class structure provides these data classes.

Data representing	Class
Pegalns-Data-InsurancePolicy	Represents a general insurance policy. It is specialized by its subclasses that represent lines of business (LOB) and product groups, similar to the class structure in Pegalns- PAB-Work-.
Pegalns-Data-PolCmp	Contains several subclasses that represents components in a product. These classes are used when defining product and component rules in the Product Builder for Insurance application. Subclasses defined here inherit from the Piif class structure to take advantage of the many insurance properties provided by IAA – IBM's Insurance Application Architecture.
Pegalns-Data-Party	Contains classes that define parties.
Pegalns-Data-Submission	Represents a general submission data work object. It is specialized for various LOBs' specific submission data.

Data representing	Class
PegaIns-Data-Application	Represents a general application data work object specialized by its LOB.
PegaIns-Data-Quote	Represents the estimated premium amount for an applicant based on several factors including the type of insurance, coverage amount, length of coverage, age, gender, health, and medical history, family history, build, and approximate rating class. Then, the selected quote is proposed for policy issuance.
PegaIns-Data-Customer	Represents the customer information, either individual or business. Captures information such as address, communication options, and personal information.
PegaIns-Data-PriorCarrier	Captures the previous carrier insurer information such as policy number and the effective and expiry dates.
PegaIns-Data-PriorClaim	Captures the previous claims filed with carriers.
PegaIns-Data-VehicleInfo	Captures vehicle information such as make, model, annual mileage, and vehicle use.
PegaIns-Data-AgencyLOB	Contains the list of LOBs that an agency is licensed to sell in a given jurisdiction.

All the data classes that appear under the Data Explorer are defined in the Cases & data tab of the PegaInsurance Application rule. You can add or delete the data types based on the application or the built-on-application relevance and requirement. This also provides a snapshot of all the data types currently used in the application.

## Connecting system of record

The Pega Foundation for Insurance provides a robust foundation to leverage data pages. Data pages help retrieve data that is stored in any external system required for the processing of a case.

Using data pages separates the interface (i.e., the source of the data) from the data model in your system. For your implementation, you can leverage data pages and extend them to your layer. You can then change the data source to load the data from its system of record. The goal is to eliminate the use of numerous activities, sections, and other rules. With data pages, you control the loading and mapping of the data in a single data page rule.

- **D\_Customer**
- **D\_BusinessUnitList**
- **D\_ContactList**
- **Insurance policy data pages**
- **Other data pages**

### D\_Customer

The purpose of the D\_Customer data page is to get customer details. To view the data page, in the Dev Studio header search text field, search for and select **D\_Customer**. In the **Data sources** section, you configure the source for this data page conditionally and you define the source using activities.

This data page loads the customer information based on the customer ID (set on the parameter page of the data page rule).

The D\_Customer data page is an example of a data page that is used as the source of a property of mode page (Customer in the Pegalns- class).



It demonstrates you can only set the property for any case. The OwnerID and the data page are called to load the customer object into your clipboard.

## D\_BusinessUnitList

The purpose of the Business Unit List data page is to get a list of companies. To view the data page, in the Dev Studio header search text field, search for and select **D\_BusinessUnitList**. In the **Data sources** section, you configure the source for this data page as the GetBusinessUnits report definition of the Pegalns-Interface-BusinessUnit class. Then you set up a response data transform, such as the BusinessCustomerListMapper transform, configured with relevant mapping of the values obtained. If you have an existing system of record for companies, you can replace this source and then update the mapper in the response data transform.

This data page is used to retrieve the list of companies (business units) in a customer search.

## D\_ContactList

The purpose of the D\_ContactList data page is to get a list of individuals that are contacts or customers in your system. To view the data page, in the Dev Studio header search text field, search for and select D\_ContactList. The source for this data page is configured to be the GetContacts report definition of the PegaData-Contact class. The response data transform CustomerListMapper is configured with the relevant mapping of the values obtained.

When you search for a contact on the **Customer search** screen, the screen shows a list of matching contacts. This data page retrieves the contacts into the list.

## Insurance policy data pages

The Pegalns-Data-InsurancePolicy class has two key data pages.

D\_Policy is of the type page; it is used to retrieve the full policy details. In Pega Foundation for Insurance, this loads the data from the IIF\_POLICY table, which is of the

type *PegaIns-Interface-Policy*. Because the interface model uses a page property (represented in the BLOB), IIF maps the property to the top-level data page. The interface policy table is used to store some header data as well as the Pega Foundation for Insurance Policy Object model in a page property.

In your implementation, where you may have an external policy system of record, update this data page to call the necessary connection to its source. You can then update the mappers to map the response from your policy system of record to the Pega Foundation for Insurance policy data model.

*D\_PolicyList* is of the type *List*; it returns a list of policies for a given customer. It differs from the *D\_Policy* data page in that it only retrieves header-level data that is common across all types of policies. The results are always of the type *PegaIns-Data-InsurancePolicy*.

## Other data pages

Additional data pages can be accessed from the **Data types** explorer in the developer portal (i.e., Dev Studio). To view the data pages in your application, click **Data types** in the navigation panel of Dev Studio.

## Managing reference data

The application data types provide a default set of properties for your use. You can add or remove properties from these data types depending on your requirements. You can also add new data types. For more information, see [Mapping the application data](#)

## Implementing work classes or case types

The Pega Foundation for Insurance application includes a sample work class structure that provides example processes.

The only core case type that is built and maintained in Pega Foundation for Insurance is the Customer case is *PegaIns-Work-ManageCustomerAccount* class.



The other cases in Pega Foundation for Insurance, such as the various new business applications are included for backward compatibility. See [Pega Underwriting for Insurance](#) documentation on Pega Community for information about new implementations that focus on new business.

## Application configurations

### Updating Dynamic class referencing

Dynamic Class Referencing (DCR) is a pattern to avoid hardcoding of class names, flow names, workbasket names and so on at an application level so that the implementation layers can easily extend the application.

Pega Foundation for Insurance has implemented the DCR approach using a data page and data transforms. Using this approach, any specialized layer that is built on the PegaIns-Data layer, is saved as the data transform rules in the specialized layer ruleset to update the class names, flow names and add any additional property mappings. This approach will dynamically set the specialized layer's class names, flow names and any other values to the appropriate clipboard pages at run time.

#### Configuring DCR

Follow these steps to configure DCR:

1. Search for the Data Page: D\_AppExtension and copy the above data page into your implementation ruleset.
2. Enter the field details as per your configuration settings. Enter **Object type** as **PegaIns-Data-AppExtension** class or implementation class in the specialized layer extended class from **PegaIns-Data-AppExtension** in the **Data sources** section:
  - a. Select **Source type** as **Data Transform** from the list.
  - b. Select Data transform **pyDefault** from above selected or its parent classes.
  - c. Update the properties in the Data transform as per your implementation layer settings.

**Note:** As a best practice, you can create a new class extending from **PegaIns-Data-AppExtension** in the implementation layer and configure the Data Transform rule in the implementation layer with only required properties to easily consume base layer settings coming in future releases.



The following example explains on leveraging DCR from core layer in implementation layer.

After creating an implementation layer on top of PFI application, you need to override the data transform **PegaIns-Data-AppExtension.pyDefault** in the implementation layer to update the class names with the implementation layer specific values.

- **Integrations**
- **Defining the security model and organization structure**
- **Customizing the user experience**
- **Defining report requirements**

## Integrations

The **PegaIns-Interface-** classes contains classes that are used to build interfaces and APIs to external systems. You can extend these classes to leverage the existing configuration to facilitate data access to your core external and backend systems.

Some common integration points for the Pega Foundation for Insurance include interfaces to persist and retrieve insurance policy data:

Interface class	Description
PegaIns-Interface-InsurancePolicy	This class inherits from PegaIns-Interface-. The InsurancePolicy class does not inherit

	from Account. This lets Pega Foundation for Insurance use the PegaApp-Interface-Account class in the future.
PegaIns-Interface-Contact	This contains sample contact data used in the application. It is specialized to capture communication options (PegaIns Interface-Contact-CommunicationOptions).
PegaIns-Interface-BusinessUnit	This class contains sample business data used in the application.
PegaIns-Interface-Roles	This class contains sample role data used in the application, such as Applicant and Insured party.
PegaIns-Interface-Agent	This class inherits from PegaIns-Interface-. It contains sample data specific to Agents.
PegaIns-Interface-Agency	This class inherits from PegaIns-Interface-. It contains sample data specific to Agencies. Agency and agent have a one-to many relationships.
PegaIns-Interface-Vehicles	This class inherits from PegaIns-Interface-. It contains sample vehicle data such as make, model, year, and so on.



**Note:** Identify integration points as early in your planning as possible. If a connection to an external data source is required and either the data itself does not exist or the interface to that data does not exist, you must account for the time to build the interface to this application.

## Defining the security model and organization structure

For information on defining security model and organizational structure, see [Defining the security model and organization structure](#).

- [Defining your authentication scheme](#)

### Defining your authentication scheme

Your site can use a centralized, automated means of maintaining operator data instead of maintaining it manually in the Pega Foundation for Insurance.

- Discuss Authentication schemes with your site's security and application server teams
- Determine the appropriate authentication type

For more information on authentication scheme planning, see [Authentication in the Pega Platform](#).

Pega Foundation for Insurance comes with a predefined set of access groups, roles, and privileges. You can use the application roles as a starting point, but you should create your own application-specific access groups and roles to avoid any future problems when upgrading.

Other rule types such as sections, flow actions, and activities use roles and privileges to allow access to these rules at run time.



**Note:** To review the Pega Foundation for Insurance access groups and roles, click Dev Studio > Org & Security > Groups & Roles or Dev Studio > Org & Security > Groups & Roles > Access Roles.

## Defining your access groups

- Identify additional access groups needed for your application
- Identify portals associated with these access groups

## Defining access roles and privileges

You can associate one or more roles to an access group. Roles are additive. The more roles that you add to an access group, the more authorization there is. Privileges can be associated with one or more roles.

- Determine which roles are needed for your application. You can use the Pega Foundation for Insurance roles as a starting point.
- Determine which privileges to associate with each role.
- Associate each role with an access group.

For more information, see [Learning about access groups](#) and [Managing access roles](#).

## Customizing the user experience

While Pega Foundation for Insurance is fully functional immediately upon installation, you will want to change portions of the user experience (UX) to meet the needs of the users at your site.

### Designing the portal

Review the content of the Case Manager and Product Designer portals to ensure that only relevant data is presented.

1. Log on to Dev Studio by using the operator ID `administrator@pega.com` and the password that you specified for that operator. From the Launch menu, select Case Manager portal.
2. Review each of the portal sections.

3. Repeat this process for the Product Designer portal if you plan to leverage the Product Builder for Insurance application in the Foundation for Insurance to manage your portfolio of insurance products.



**Note:** If you have imported the Pega Foundation for Insurance demo application and sample operators as part of installation, Log in to the application as Core Administrator using the password that you specified when you enabled this operator; to enable Pega-provided operators, see [Enabling operators](#).

Otherwise, complete the following steps to create a new operator ID:

- a. Log on to Dev Studio by using the operator ID `administrator@pega.com` and the password that you specified for that operator.
  - b. Save a copy of the existing `administrator@pega.com` operator and give it a name that identifies it as an Administrator operator.
  - c. Add **PegaIns: Administrators** access group to the new operator record. Click the radio button to the left of the access group to select it as the default access group.
  - d. Save the new operator record
4. Log in as the new operator that you created. From the **Launch Portal** menu, select **Product Designer**.

## Defining report requirements

Based on your login and portal, Pega Foundation for Insurance provide numerous pre-configured reports to monitor case and work inventory as well as monitor workforce productivity and quality. These standard reports are driven by the case and work object lifecycle infrastructure as well as the work and assignment-level service level rules for goals and deadlines used in managing the life cycle of a case.

For more information on reporting requirements, see [Defining reporting requirements](#).



## Features implementation

The Pega Foundation for Insurance provides the necessary building blocks to accelerate an implementation and is used as the foundation for most of our insurance applications. This chapter describes how to use some of the key functionality that is provided by Pega Foundation for Insurance.

- **Case management**
- **Agent Management**
- **Customer management**
- **Configuring products: Using Product Builder Core**
- **Defining products**
- **Pre 7.1 Insurance application cases**
- **Data tables**

## Case management

The Pega Foundation for Insurance does not fully use all '23 case management features, but the existing work types are maintained for backward compatibility to earlier releases of the Pega Foundation for Insurance application. In previous releases, the new business processes were built in Pega Foundation for Insurance. However, all future case management functionality for new business will be implemented in Pega Underwriting for Insurance.

You can still explore the old flows and processes which are all built in the *PegaIns-Work-Application* classes; however, we strongly recommend utilizing Pega Underwriting for Insurance if looking to build a new business/underwriting solution.

## Agent Management

Beginning in Pega Foundation for Insurance 7, a new way to manage agent and agencies was implemented to provide a simple example of how you can easily manage data within the Pega Foundation for Insurance. The agent and agency data is comprised of sample data. It is expected that it gets replaced by a customer's Agency Management System.

In the Pega Foundation for Insurance developer portal, a landing page lets you manage the sample data for agents and agencies. You can navigate to the landing page by clicking **Configure > Framework Management > Tools > Agent/Agency Management**. On the Agent/Agency Management screen, you can search for an agent or agency, create an agent, or create an agency.

This implementation uses the latest UI as well as data pages to search for an agent or agency. The data pages are read data from the Pega Foundation for Insurance data tables. You can replace the source of its data with your data source.

The Agent Search uses the D\_AgentList data page that returns results of type Pegalns-Data- Party-Person-Agent. It uses the GetListOfAgents report definition of the Pegalns-Interface- Agent class (which maps to the data table). In your implementation, you can replace the source to do a look-up to your own agent data and then just update the response data transform. By doing these two steps, you should be able to search your agent management system data through Pega Foundation for Insurance.

The following sections describe how the agents can be managed in the Pega Foundation for Insurance.

- [Agent search and configuration](#)
- [Agency search and configuration](#)
- [Create agent and agency configuration](#)

## Agent search and configuration

When you search for an agent using the fields provided on the Agent/Agency Management screen, a D\_AgentList data page is initialized and populates the data as a list based on the search criteria.

When you click the **Last Name** or **First Name** link in the search results, the **Update Agent Information** screen opens where you can update agent information.

To view the D\_AgentList data page, in the Dev Studio header search text field, search for and select **D\_AgentList**.

The object type definition of this data page is Pegalns-Data-Party-Person-Agent, which is used in the context of agent-specific data. This data page is sourced by a GetListOfAgents report definition of the Pegalns-Interface-Agent class. This class is mapped to the IIF\_Agent table in the PegaDATA database. This is the table in which all the agent-specific information is persisted. Every agent is identified with an AgentId unique key. This table also has an **AgencyCode** column that links an agent with the corresponding agency.

This data page accepts the following parameters to retrieve the list of agents from the IIF\_Agent table in the database, and then populates the data as pxResults() pagelist of the Pegalns-Data-Party-Person-Agent class:

Parameter	Value
AgentId	Param.AgentId
LastName	Param.LastName
AgencyCode	Param.AgencyCode
FirstName	Param.FirstName
Email	Param.Email

The Agent data that is retrieved from the interface layer is mapped to the database table, and then is mapped back to the data class (i.e., Pegalns-Data-Party-Person-Agent)

using an AgentListMapper response data transform of the Code-pega-List class. To view the clipboard structure, at the bottom of Dev Studio, click **Clipboard**.

## Agency search and configuration

Similarly, the agency search uses the D\_AgencyList data page to initialize and populate the data. To search for an agency, on the **Agent/Agency Management** screen, click **Agency** and type a name in the **Agency name** field.

When you expand the **Agency Name** in the **Results** list, all of the agents linked to that agency appear. To update an agent, double-click the agent name and complete the fields on the **Update Agent Information** form.

When you click the **Agency Name** link in the search results, the **Update Agency Information** form appears where you can update agency data.

In summary, you can update agent data in two ways:

- From the agent search
- From the agency search

To view the D\_AgentList data page, in the Dev Studio header search text field, search for and select **D\_AgencyList**.

The object type definition of this agency data page is Pegalns-Data-Party-Org-Agency, which is used in the context of agency specific data. This data page is sourced by a report definition called "GetListOfAgencies" of the Pegalns-Interface-Agency class. This class is mapped to the IIF\_Agency table in the database PegaDATA. This is the table in which all the agency-specific information is persisted. Every agency is identified with a unique key named "AgencyCode". This data page accepts the following parameters to fetch the list of agencies from the IIF\_Agency table from the database and then populate the data as the pxResults () pagelist of the Pegalns-Data-Party-Org-Agency class.

Parameter	Value
AgencyCode	Param.AgencyCode
AgencyName	Param.AgencyName
IsActive	Param.isActive
CarrierCode	Param.CarrierCode

The Agency data that is retrieved from the interface layer is mapped to the database table, and then is mapped to the data class (i.e., Pegalns-Data-Party-Org-Agency) using an AgencyListMapper response data transform of the Code-pega-List class. To view the clipboard structure, at the bottom of Dev Studio, click **Clipboard**.

## Create agent and agency configuration

- [Create agent](#)
- [Create agency](#)

### Create agent

To create agents or agencies, use the **Create Agent** and **Create Agency** buttons in the top right corner of the **Agent/Agency Management** screen.

When you click **Create Agent**, the **Collect Agent Information** screen collects agent details and persists them in the IIF\_Agent database table. The agent details include: personal information, the corresponding agency, and license information.

An IntakeAgentDetails flow action of the Pegalns-Data-Party-Person-Agent class has a SaveAgentInformationWrapper post-processing activity of the Pegalns-Data-Party-Person- Agent class. This calls the SaveAgentInformation activity of the Pegalns-Interface-Agent class, which then processes the Agent information and saves it in the IIF\_Agent (mapped to Pegalns-Interface-Agent class) database table.

To view the **IntakeAgentDetails** flow action, in the Dev Studio header search text field, search for and select **IntakeAgentDetails**. On the Flow Action page, click the **Action** tab.

The Wrapper activity first sets the **MyTempPage** of the class **PegaIns-Data-Party-Person-Agent** class and passes this as parameter to the **SaveAgentInformation** activity. The agent data is first set in **MyTempPage** and then transformed to the interface layer (**PegaIns-Interface-Agent**) to be saved in the database table.

**MyTempPage** is in the data layer in the clipboard structure. To view the structure, at the bottom of Dev Studio, click **Clipboard**.

The **PageToBePersisted** interface layer is saved in the database table after the transformation from the data layer above.

This **SaveAgentInformation** activity generates a unique Agent ID while creating a new agent, or it sets the existing Agent ID while updating an existing agent from Agent search results. The data transformation from data layer to interface layer is done by the **RenormalizeAgentDetails** data transform rule of the **PegaIns-Interface-Agent** class. Once the data is transformed to the interface layer, it is persisted in the database by the **Obj- Save** method.

To view the **SaveAgentInformation** activity, in the Dev Studio header search text field, search for and select **SaveAgentInformation**.



**Note:** While saving agent information the licensed LOB's information is saved as an **AgentLOBList** pagelist of the **PegaIns-Data-AgencyLOB** class. While retrieving from the database to update an existing agent, this list is retrieved as a **Code-Pega-List** using the **D\_AgentLOBList** data page.

## Create agency

Similarly, the IntakeAgencyDetails flow action of the Pegalns-Data-Party-Org-Agency class calls the post-processing activity SaveAgencyInformationWrapper of the Pegalns-Data-Party-Org-Agency class. This wrapper activity, in turn, calls the SaveAgencyInformation activity of the Pegalns-Interface-Agency class. This called activity, such as in the case of the agent creation activity, creates an agency code while creating a new agency, and then renormalizes the data from the data layer to the interface layer. Similar to the agent case, these agency activities are reused for updating an existing agency as well.

The data class used for Agency data is Pegalns-Data-Party-Org-Agency, and the interface class is Pegalns-Interface-Agency.

To view the **SaveAgencyInformation** activity, in the Dev Studio header search text field, search for and select **SaveAgencyInformation**.



**Note:** Agency or agent creation does not create any long running work object. It just persists or retrieves the data in the agent and agency database tables.

For site specific implementation, the data pages should be updated to have the appropriate sources for their agent data.

## Customer management

The process for customer account management provides a comprehensive view of the customer and it includes the capabilities to: create a new customer (either individual or business), open an existing customer and view the details, or update existing customer details. All the details, including the customer profile with personal information, previous claim details, policy information, and customer activities, can be captured and displayed in a single unified view.

Whenever a new customer contact is created, a Manage Customer Account (MCA) work object is created and linked to the customer contact record. It is maintained as a long running object. There is only one MCA work object per customer contact. The Pega Foundation for Insurance model treats each individual contact (individual or business) as the customer.

- [Accessing the MCA work object for a customer](#)
- [MCA technical configuration](#)
- [Search contact business unit technical configuration](#)
- [Create new contact and new BU technical configuration](#)

## Accessing the MCA work object for a customer

1. Open the Case Manager portal and click the **Customer management** tab.
2. Enter **song** in the **Last Name field** and then click **Search**.
3. Click either the **Last Name** or **First Name** link.

The MCA work object opens. If no MCA work object exists for the customer, it is created on the fly when you click either of the links. This could happen if you integrate with an external system for customer data and do not create customers through the solution for the first time.

The *PegaIns-Data-Party-CheckForCAID* activity checks whether the MCA work object already exists. If it does not, the activity creates a new MCA work object and links it to the OwnerId.

You can perform several actions from the **Actions** menu of the MCA work object related to managing the customer's account such as updating the customer profile and adding attachments.



## MCA technical configuration

The following activities create a new contact and MCA work object for that contact, respectively:

- SaveNewContactInfo in the Pegalns-Work class
- CreateManageCustomerAccount in the Pegalns- class

The MCA work object is saved in the IIF\_WORK database table and is linked to the customer using OwnerId.

For a business customer, the Pegalns-Work SaveNewBUInformation activity is used before creating a MCA work object.

You can create a new business customer from the Customer search screen. To create a new business customer, click **Create new**. The **Create New Customer** screen opens so that you can enter the business customer details.

## Search contact business unit technical configuration

On the Customer management screen, you can search for an individual customer or a business customer.

- [Searching for customer](#)
- [Searching for a business customer](#)

### Searching for customer

When you search for an individual customer using criteria such as Last Name, First Name, Contact ID, and so on, this property is set on the CustomerSearch clipboard page of the Pegalns-Work-ManageCustomerAccount class and is fed into the D\_ContactList data page as a parameter. By taking this parameter as an input, the data page populates the data in the clipboard.

The following table shows the parameters accepted by this data page.

Parameter	Value
LastName	Param.LastName
EmailID	Param.Email
PhoneNo	Param.PhoneNo
ContactID	Param.ContactID
SSN	Param.SSN
ZipCode	Param.ZipCode
FirstName	Param.FirstName
DateOfBirth	Param.DateOfBirth

When you click **Search** from the **Customer Management** screen, the returned list appears in a repeat grid in the user interface. This D\_ContactList data page is sourced by the GetContacts report definition rule of the PegaApp-Interface-Contact class. Both classes are mapped to the PA\_CONTACT table in the PegaDATA database. After the data is retrieved from PegaApp-Interface-Contact, it is then mapped into the data layer (PegaIns-Data-Party- Person).

As mentioned earlier in this chapter, when you click on the **First Name** or **Last Name** link of a contact in the search results, the corresponding MCA work object opens if it already exists. Otherwise, a new MCA work object is created on the fly and opens up for the selected contact.

In the **Actions** tab of the First Name, Last Name link properties panel, an OnClick event is defined. This event runs a CheckForCAID activity of the PegaIns-Data-Party- class to check if an MCA work object already exists. If it does not exist, it creates a new MCA work object. If it does exist, then the Open-Work-By-Handle action opens the MCA work object.

To view the activities and data pages mentioned above, in the Dev Studio header search text field, search for and select the following:

- CheckForCAID
- CreateManageCustomerAccount
- D\_ContactList

## Searching for a business customer

Similarly, even in the case of a business search as per the search criteria, a D\_BusinessUnitList data page populates the business unit's search results using the same report definition that was used to retrieve individual contacts. It renormalizes the data to the data layer (PegaIns-Data-Party-Org-Company) using a BusinessCustomerListMapper data transform rule. To view the D\_BusinessUnitList data page, in the Dev Studio header search text field, search for and select **D\_BusinessUnitList**.

## Create new contact and new BU technical configuration

When a search has no results, create a new customer by clicking **Create new** and completing the fields on the **Create New Customer** screen.

The **Create new** button launches a CreateNewContact local action to collect details about the new individual customer. This rule has been specialized (using circumstancing) to support the customer as a business rather than as an individual. To view details about this flow action, in the Dev Studio header search text field, search for and select **CreateNewContact**.

Similarly, you can search for a Business on the **Customer search** screen. If the search has no results, create a new business unit by clicking **Create new** and completing the fields on the **Create New Business Unit** screen.

Use the Dev Studio header search text field to search for and select the **CustomerSearchBusinessGrid** section rule of the PegaIns-Work-ManageCustomerAccount class. On the section page, you can view the technical configuration of the **Create new** button. An OnClick event is defined to launch the CreateNewContact flow action.

- **Individual customer creation main activity**
- **Business customer creation main activity**
- **Update Customer Profile**

## Individual customer creation main activity

On the CreateNewCustomer flow action, the SaveNewContactInfo post-processing activity of the Pegalns-Work class persists the individual customer data in the appropriate database tables (pa\_contact, pa\_address, pa\_communications\_options, and so on).

To view the SaveNewContactInfo activity, in the Dev Studio header search text field, search for and select **SaveNewContactInfo**.

The following activities are called from the SaveNewContactInfo main activity:

- SaveContactInformation of the Pegalns-Interface-Contact class
- SaveAddressInformation of the PegaApp-Interface-Address class
- SaveCommunicationInformation of the PegaApp-Interface-Contact-CommunicationOptions class
- CreateManageCustomerAccount of the Pegalns- class

The SaveContactInformation activity saves the contact data from a NewContactPage temporary page of the class Pegalns-Data-Party-Person to the class Pegalns-Interface-Contact, which is mapped to the PA\_CONTACT database table. The data transform renormalizes the data to the RenormalizeCustomer interface layer of the Pegalns-Interface- Contact class.

Similarly, address information and communication information is renormalized and saved to the respective database tables.

## Business customer creation main activity

For a business customer, a SaveNewBUInformation main activity is used to persist the data to the pa\_businessunit table and create the corresponding MCA. To view this activity, in the Dev Studio header search text field, search for and select **SaveNewBUInformation**.

Similar to ContactId in the case of an individual customer, the SaveNewBUInformation activity also creates a unique ID called BusinessUnitId and calls the SaveBUInformation activity of the Pegalns-Interface-BusinessUnit class. The other activities that are called are the same activities that were used in the creation of the individual customer. Those are reused as well.

Similar to the case of an individual customer creation, the data is transformed into the interface layer from the data layer as shown in the table later in this topic.

To view the SaveBUInformation activity, in the Dev Studio header search text field, search for and select SaveBUInformation.

The following table shows the interface layers, the tables associated with them, and the corresponding data layers.

Interface layer	Table	Data layer
PegaData-Contact	P_CONTACT	Pegalns-Data-Party- Person
PegaData-Address	P_ADDRESS	Pegalns-Data- Address
PegaData-Organization / Pegalns-Interface- BusinessUnit	P_ORGANIZATION/ ORGANIZATION_INS	Pegalns-Data-Party- Org-Company

## Update Customer Profile

You can update customer details for both individual and business customers from MCA by clicking **Actions > Update customer profile**. The UpdateCustomerDetails local action in this menu launches a screen to update the customer details.

This local action is defined under the Flow-Wide Local Actions of the Design tab in the ManageCustomerAccount flow of the UpdateCustomerDetails class. This flow action has a SaveCustomerAccountInformation post-processing activity of the Pegalns-Work class that is used for updating both individual customer and business customers. The activities, which are used while creating a new contact or Business Unit, are reused in this activity.

To view the **SaveCustomerAccountInformation** activity, in the Dev Studio header search text field, search for and select **SaveCustomerAccountInformation**.

## Configuring products: Using Product Builder Core

- [Dynamic System Setting \(DSS\) Rules](#)

### Dynamic System Setting (DSS) Rules

Update the following dynamic system settings to specify the ruleset and version used by PBI application to save the products and components.

DSS Rule name	Value
<i>Pegalns-PBFW • PreferredRulesetToSave</i>	Name of the ruleset
<i>Pegalns-PBFW • PreferredRulesetVersionToSave</i>	Open ruleset version

For example, if *PreferredRulesetToSave* is set to *PBISampleData* and *PreferredRulesetVersionToSave* is set to *08-08-01*, products and components are created or saved in *PBISampleData:08-08-01 RSV*.

## Defining products

To define an insurance product, create a new taxonomy structure for your specific product hierarchy, and then create the product structure. For more information, see the *Pega Product Builder for Insurance User Guide* on the [Pega Foundation for Insurance](#) product page.

1. To create a new taxonomy structure:
  - a. In the header of Dev Studio, click **Configure > Framework Management > Tools > Product Structure**.
  - b. Click **Edit taxonomy** and define the new taxonomy structure for your product.
  - c. Click **Submit**.
2. To create a new product structure for the taxonomy you created in Step 1:
  - a. Click the **Add Node** link and then enter a name for the product.
  - b. Click **Submit**.
  - c. Create the product structure, and then click **Save**.

- [Introduction](#)

## Introduction

By using the Product Builder for Insurance application, insurers can rapidly build and maintain insurance products and adapt to changing business needs or market conditions.

See the Product Builder for Insurance User Guide on the Pega Community to fully understand Product Builder for Insurance and its features.

There are product examples provided with Pega Foundation for Insurance that can be leveraged in Pega Underwriting for Insurance. To fully understand the integration of Product Builder for Insurance products with the Pega Underwriting for Insurance submission process, see the Pega Underwriting for Insurance documentation on Pega Community.



## Pre 7.1 Insurance application cases

The Pega Foundation for Insurance still contains work objects (cases) that are used to represent an application for insurance. As mentioned in this document, these cases have not been updated or upgraded to the 7.1 stage-based case management. They only remain for backward compatibility for existing customers.

This topic will review the Personal Auto application to demonstrate what has been updated to support the new version of Product Configuration application.

**Note:** Product Configuration is still provided with the Pega Foundation for Insurance. However, it is not recommended for new implementations. Starting in 7.1, all the New Business Processing is configured in the Pega Underwriting for Insurance application. Pega Underwriting for Insurance leverages the Product Builder for Insurance application.

- **Pega Foundation for Insurance Personal Auto application**
- **Product configuration (using Product configuration application)**

## Pega Foundation for Insurance Personal Auto application

To test the Pega Foundation for Insurance Personal Auto application, in the Dev Studio header search text field, search for and select the **PegaIns-Work-Application-Pers-Automotive** class and run the NewWork flow.

This flow then calls numerous sub-flows that you can traverse through to see an example application process for automobile insurance using Pega Foundation for Insurance and Product Configuration. The important part of this section is to cover how the Pega Foundation for Insurance flows have been updated in 7.1 to take advantage of the Product Configuration 7.1 UI.





**Note:** All new implementations should use Pega Underwriting for Insurance for New Business processing. For more details on the new submission processes, see the Pega Underwriting for Insurance Implementation Guide for the application that you are using. This guide describes how to configure and extend submissions.

## Product configuration (using Product configuration application)

Starting in version 7.1, Product Configuration has converted its controls and user interfaces to be 7.1-compliant (i.e., auto-generated). Previous versions of the application had non- auto generated controls and section rules.

The old version of the Pega Foundation for Insurance application flow used a flow action that allowed you to fill out the product details based on the product you chose. This was completely controlled by Product Configuration.

## Data tables



**Note:** These tables are specific to database administrators. All cells filled with N/A in the below tables indicates that there is no value in the database for that particular cell.

### P\_ADDRESS

This table stores address information about contacts and business units. Replace calls to this table with calls to your data tables.

## Columns

Name	Data type	Size	Scale	Nulls?	Dflt
ACTIVE	VARCHAR2	16	N/A	No	N/A
ADDRESS1	VARCHAR2	128	N/A	No	N/A
ADDRESS2	VARCHAR2	128	N/A	No	N/A
ADDRESS3	VARCHAR2	128	N/A	No	N/A
ADDRESS4	VARCHAR2	128	N/A	No	N/A
ADDRESS5	VARCHAR2	128	N/A	No	N/A
ADDRESSID	VARCHAR2	16	N/A	Yes	N/A
ADDRESSTYPE	VARCHAR2	32	N/A	No	N/A
CITY	VARCHAR2	128	N/A	No	N/A
COUNTRYCODE	VARCHAR2	8	N/A	No	N/A
DOMAINID	VARCHAR2	16	N/A	No	N/A
DOMAINTYPE	VARCHAR2	16	N/A	No	N/A
FROMDATE	DATE		N/A	No	N/A
POSTALCODE	VARCHAR2	32	N/A	No	N/A
PRIMARYADDRESS	VARCHAR2	16	N/A	No	N/A
PROVINCE	VARCHAR2	128	N/A	No	N/A
PXCREATEDATETIME	DATE		N/A	No	N/A
PXCREATEOPERATOR	VARCHAR2	128	N/A	No	N/A
PXCREATEOPNAME	VARCHAR2	128	N/A	No	N/A
PXCREATESYSTEMID	VARCHAR2	32	N/A	No	N/A
PXUPDATEDATETIME	DATE		N/A	No	N/A
PXUPDATEOPERATOR	VARCHAR2	128	N/A	No	N/A

Name	Data type	Size	Scale	Nulls?	Dflt
PXUPDATEOPNAME	VARCHAR2	128	N/A	No	N/A
PXUPDATESYSTEMID	VARCHAR2	32	N/A	No	N/A
PYSTATE	VARCHAR2	128	N/A	No	N/A
REGION	VARCHAR2	128	N/A	No	N/A
SUBREGION	VARCHAR2	128	N/A	No	N/A
TODATE	DATE		N/A	No	N/A

### Constraints

Column	Constraint	Referenced columns
ADDRESSID	P_ADDRESS_V2_PK	N/A

## P\_ORGANIZATION

This table stores information about organizations. Replace calls to this table with calls to your data tables.

### Columns

Name	Data type	Size	Scale	Nulls ?	Dflt
ACTIVE	VARCHAR2	16	N/A	No	N/A
DESCRIPTION	VARCHAR2	255	N/A	No	N/A
EMPLOYEECOUNT	VARCHAR2	16	N/A	No	N/A
ENDDATE	DATE		N/A	No	N/A
FACEBOOKID	VARCHAR2	32	N/A	No	N/A
FACEBOOKURL	VARCHAR2	64	N/A	No	N/A
FAX	VARCHAR2	16	N/A	No	N/A



Name	Data type	Size	Scale	Nulls ?	Dflt
INDUSTRY	VARCHAR2	32	N/A	No	N/A
ISPARENT	VARCHAR2	16	N/A	No	N/A
LEGALENTITYTYPE	VARCHAR2	64	N/A	No	N/A
LINKEDINID	VARCHAR2	32	N/A	No	N/A
LINKEDINURL	VARCHAR2	64	N/A	No	N/A
ORGANIZATIONID	VARCHAR2	16	N/A	Yes	N/A
ORGANIZATIONNAME	VARCHAR2	255	N/A	No	N/A
ORGANIZATIONTYPE	VARCHAR2	16	N/A	No	N/A
PRIMARYEMAILID	VARCHAR2	255	N/A	No	N/A
PRIMARYPHONENUMBER	VARCHAR2	16	N/A	No	N/A
PXCREATEDATETIME	DATE		N/A	No	N/A
PXCREATEOPERATOR	VARCHAR2	128	N/A	No	N/A
PXCREATEOPNAME	VARCHAR2	128	N/A	No	N/A
PXCREATESYSTEMID	VARCHAR2	32	N/A	No	N/A
PXUPDATEDATETIME	DATE		N/A	No	N/A
PXUPDATEOPERATOR	VARCHAR2	128	N/A	No	N/A
PXUPDATEOPNAME	VARCHAR2	128	N/A	No	N/A
PXUPDATESYSTEMID	VARCHAR2	32	N/A	No	N/A
REVENUE	NUMERIC	16	2	No	N/A
SECONDARYEMAILID	VARCHAR2	255	N/A	No	N/A
SECONDARYPHONENUM BER	VARCHAR2	16	N/A	No	N/A
STARTDATE	DATE		N/A	No	N/A
TAXID	VARCHAR2	16	N/A	No	N/A

Name	Data type	Size	Scale	Nulls ?	Dflt
TERRITORYID	VARCHAR2	64	N/A	No	N/A
TWITTERID	VARCHAR2	32	N/A	No	N/A
TWITTERURL	VARCHAR2	32	N/A	No	N/A
WEBSITE	VARCHAR2	255	N/A	No	N/A

### Constraints

Column	Constraint	Referenced columns
ORGANIZATIONID	P_ORGANIZATION_V2_PK	N/A

## P\_CONTACT

This table is a sample table that stores information about contacts. Replace calls to this table with calls to your data tables.

### Columns

Name	Data type	Size	Scale	Nulls?	Dflt
ACTIVE	VARCHAR2	16	N/A	No	N/A
ASSISTANTEMAIL	VARCHAR2	128	N/A	No	N/A
ASSISTANTNAME	VARCHAR2	128	N/A	No	N/A
ASSISTANTPHONE	VARCHAR2	32	N/A	No	N/A
BESTTIMETOCALL	VARCHAR2	16	N/A	No	N/A
COMMPREFERENCEBYEMAIL	VARCHAR2	32	N/A	No	N/A
COMMPREFERENCEBYFAX	VARCHAR2	32	N/A	No	N/A
COMMPREFERENCEBYMAIL	VARCHAR2	32	N/A	No	N/A
COMMPREFERENCEBYPHONE	VARCHAR2	32	N/A	No	N/A



Name	Data type	Size	Scale	Nulls?	Dflt
COMPANYNAME	VARCHAR2	128	N/A	No	N/A
CONTACTID	VARCHAR2	16	N/A	Yes	N/A
CONTACTTYPE	VARCHAR2	16	N/A	No	N/A
DATEOFBIRTH	DATE		N/A	No	N/A
DEPARTMENTNAME	VARCHAR2	128	N/A	No	N/A
FACEBOOKID	VARCHAR2	128	N/A	No	N/A
FACEBOOKURL	VARCHAR2	255	N/A	No	N/A
FAX	VARCHAR2	32	N/A	No	N/A
FIRSTNAME	VARCHAR2	64	N/A	No	N/A
GENDER	VARCHAR2	16	N/A	No	N/A
INDUSTRY	VARCHAR2	32	N/A	No	N/A
JOBTITLE	VARCHAR2	128	N/A	No	N/A
LANGUAGEPREFERENCE	VARCHAR2	64	N/A	No	N/A
LASTNAME	VARCHAR2	64	N/A	No	N/A
LINKEDINID	VARCHAR2	255	N/A	No	N/A
LINKEDINURL	VARCHAR2	255	N/A	No	N/A
MARITALSTATUS	VARCHAR2	32	N/A	No	N/A
MARKETINGBYEMAIL	VARCHAR2	16	N/A	No	N/A
MARKETINGBYMAIL	VARCHAR2	16	N/A	No	N/A
MARKETINGBYPHONE	VARCHAR2	16	N/A	No	N/A
MIDDLENAME	VARCHAR2	64	N/A	No	N/A
NATIONALID	VARCHAR2	64	N/A	No	N/A
PARENTCONTACTID	VARCHAR2	16	N/A	No	N/A
PRIMARYEMAIL	VARCHAR2	128	N/A	No	N/A

Name	Data type	Size	Scale	Nulls?	Dflt
PRIMARYEMAILTYPE	VARCHAR2	32	N/A	No	N/A
PRIMARYPHONENUMBER	VARCHAR2	32	N/A	No	N/A
PRIMARYPHONETYPE			N/A	No	N/A
PRIORITYNOTE	VARCHAR2	64	N/A	No	N/A
PXCREATEDATETIME	DATE		N/A	No	N/A
PXCREATEOPERATOR	VARCHAR2	128	N/A	No	N/A
PXCREATEOPNAME	VARCHAR2	128	N/A	No	N/A
PXCREATESYSTEMID	VARCHAR2	32	N/A	No	N/A
PXUPDATEDATETIME	DATE		N/A	No	N/A
PXUPDATEOPERATOR	VARCHAR2	128	N/A	No	N/A
PXUPDATEOPNAME	VARCHAR2	128	N/A	No	N/A
PXUPDATESYSTEMID	VARCHAR2	32	N/A	No	N/A
PYTIMEZONE	VARCHAR2	16	N/A	No	N/A
SALUTATION	VARCHAR2	16	N/A	No	N/A
SECONDARYEMAIL	VARCHAR2	128	N/A	No	N/A
SECONDARYEMAILTYPE	VARCHAR2	32	N/A	No	N/A
SECONDARYPHONENUMBER	VARCHAR2	32	N/A	No	N/A
SECONDARYPHONETYPE	VARCHAR2	32	N/A	No	N/A
SUFFIX	VARCHAR2	16	N/A	No	N/A
TAXID	VARCHAR2	16	N/A	No	N/A
TERRITORYID	VARCHAR2	64	N/A	No	N/A
TERTIARYPHONENUMBER	VARCHAR2	32	N/A	No	N/A
TERTIARYPHONETYPE	VARCHAR2	32	N/A	No	N/A
TWITTERID	VARCHAR2	128	N/A	No	N/A

Name	Data type	Size	Scale	Nulls?	Dflt
TWITTERURL	VARCHAR2	255	N/A	No	N/A

### Constraints

Column	Constraint	Referenced columns
CONTACTID	P_CONTACT_V2_PK	N/A

## P\_ROLE

This table stores roles for policy, contact, and business unit links. Some workflows use the role type to determine processing steps. Add your own affiliations for account, contact, and business unit associations.

### Columns

Name	Data type	Size	Scale	Nulls?	Dflt
ACTIVE	VARCHAR2	16	N/A	No	N/A
DESCRIPTION	VARCHAR2	255	N/A	No	N/A
PXCREATEDATETIME	DATE		N/A	No	N/A
PXCREATEOPERATOR	VARCHAR2	128	N/A	No	N/A
PXCREATEOPNAME	VARCHAR2	128	N/A	No	N/A
PXCREATESYSTEMID	VARCHAR2	32	N/A	No	N/A
PXUPDATEDATETIME	DATE		N/A	No	N/A
PXUPDATEOPERATOR	VARCHAR2	128	N/A	No	N/A
PXUPDATEOPNAME	VARCHAR2	128	N/A	No	N/A
PXUPDATESYSTEMID	VARCHAR2	32	N/A	No	N/A
ROLEID	VARCHAR2	16	N/A	Yes	N/A
ROLENAME	VARCHAR2	255	N/A	No	N/A



Name	Data type	Size	Scale	Nulls?	Dflt
ROLETYPE	VARCHAR2	16	N/A	No	N/A

#### Constraints

Column	Constraint	Referenced columns
ROLEID	P_ROLE_V2_PK	N/A

## ORGANIZATION\_INS

This table stores information that describes the industry in which a business operates.

#### Columns

Name	Data type	Size	Scale	Nulls?	Dflt
ACCOUNTVALUE	NUMERIC		N/A	No	N/A
ORGANIZATIONID	VARCHAR2	16	N/A	Yes	N/A
SICCODE	VARCHAR2	4	N/A	No	N/A
NAICSCODE	VARCHAR2	6	N/A	No	N/A

#### Constraints

Column	Constraint	Referenced columns
ORGANIZATIONID	ORGANIZATION_INS_PK	N/A

## IIF\_AGENCY

This table stores agency Information for all LOBs. Agency details will be picked up from this table while creating the policy from Pega Underwriting for Insurance.

#### Columns



Name	Data type	Size	Scale	Nulls?	Dflt
PXCREATEDATETIME	DATE		N/A	Yes	N/A
PXCREATEOPNAME	VARCHAR2	128	N/A	Yes	N/A
PXCREATEOPERATOR	VARCHAR2	128	N/A	Yes	N/A
PXCREATESYSTEMID	VARCHAR2	32	N/A	Yes	N/A
PXINSNAME	VARCHAR2	128	N/A	Yes	N/A
PXOBJCLASS	VARCHAR2	96	N/A	Yes	N/A
PXUPDATEDATETIME	DATE		N/A	Yes	N/A
PXUPDATEOPNAME	VARCHAR2	128	N/A	Yes	N/A
PXUPDATEOPERATOR	VARCHAR2	128	N/A	Yes	N/A
PXUPDATESYSTEMID	VARCHAR2	32	N/A	Yes	N/A
PYLABEL	VARCHAR2	64	N/A	Yes	N/A
PYRULESETNAME	VARCHAR2	64	N/A	Yes	N/A
PZINSKEY	VARCHAR2	255	N/A	No	N/A
PZPVSTREAM	BLOB		N/A	Yes	N/A
AGENCYCODE	VARCHAR2	32	N/A	Yes	N/A
AGENCYNAME	VARCHAR2	32	N/A	Yes	N/A
CODE	VARCHAR2	32	N/A	Yes	N/A
ACTIVE	VARCHAR2	5	N/A	Yes	N/A

## Constraints

Constraintname	PEGAINS_INTERFACE_AGENCYTES_PK
Type	PRIMARY
Disable	No
Referenced Schema	N/A

Constraintname	PEGAINS_INTERFACE_AGENCYTES_PK
Referenced Table	N/A
Cascade on Delete	No
Check Condition	N/A
Deferrable?	No
No Validate?	No
Initially Deferred?	No
RELY (Do Not Enforce)?	No

### Constraint column details

Column	Constraint	Referenced columns
PZINSKEY	PEGAINS_INTERFACE_AGENCYTES_PK	N/A

## IIF\_AGENT

This table stores agent Information (agent ID, name, agency code) for all LOBs. Agent details will be picked up from this table while creating the policy from Pega Underwriting for Insurance.

### Columns

Name	Data type	Size	Scale	Nulls?	Dflt
PXCREATEDATETIME	DATE		N/A	Yes	N/A
PXCREATEOPNAME	VARCHAR2	128	N/A	Yes	N/A
PXCREATEOPERATOR	VARCHAR2	128	N/A	Yes	N/A
PXCREATESYSTEMID	VARCHAR2	32	N/A	Yes	N/A
PXINSNAME	VARCHAR2	128	N/A	Yes	N/A
PXOBJCLASS	VARCHAR2	96	N/A	Yes	N/A



Name	Data type	Size	Scale	Nulls?	Dflt
PXUPDATEDATETIME	DATE		N/A	Yes	N/A
PXUPDATEOPNAME	VARCHAR2	128	N/A	Yes	N/A
PXUPDATEOPERATOR	VARCHAR2	128	N/A	Yes	N/A
PXUPDATESYSTEMID	VARCHAR2	32	N/A	Yes	N/A
PYLABEL	VARCHAR2	64	N/A	Yes	N/A
PYRULESETNAME	VARCHAR2	64	N/A	Yes	N/A
PZINSKEY	VARCHAR2	255	N/A	No	N/A
PZPVSTREAM	BLOB		N/A	Yes	N/A
AGENCYCODE	VARCHAR2	32	N/A	Yes	N/A
AGENTID	VARCHAR2	32	N/A	Yes	N/A
FIRSTNAME	VARCHAR2	32	N/A	Yes	N/A
LASTNAME	VARCHAR2	32	N/A	Yes	N/A
EMAIL	VARCHAR2	32	N/A	Yes	N/A

## Constraints

Constraintname	PEGAINS_INTERFACE_AGENTTEST_PK
Type	PRIMARY
Disable	No
Referenced Schema	N/A
Referenced Table	N/A
Cascade On Delete	No
Check Condition	N/A
Deferrable?	No

Constraintname	PEGAINS_INTERFACE_AGENTTEST_PK
No Validate?	No
Initially Deferred?	No
RELY (Do Not Enforce)?	No

## IIF\_SICDIVISION

This table stores SIC information for all kinds of business divisions, including effective and termination dates. This information will be picked up from this table while creating the policy from Pega Underwriting for Insurance.

### Columns

Name	Data type	Size	Scale	Nulls?	Dflt
PXCREATEDATETIME	DATE		N/A	Yes	N/A
PXCREATEOPNAME	VARCHAR2	128	N/A	Yes	N/A
PXCREATEOPERATOR	VARCHAR2	128	N/A	Yes	N/A
PXCREATESYSTEMID	VARCHAR2	32	N/A	Yes	N/A
PXINSNAME	VARCHAR2	128	N/A	Yes	N/A
PXOBJCLASS	VARCHAR2	96	N/A	Yes	N/A
PXUPDATEDATETIME	DATE		N/A	Yes	N/A
PXUPDATEOPNAME	VARCHAR2	128	N/A	Yes	N/A
PXUPDATEOPERATOR	VARCHAR2	128	N/A	Yes	N/A
PXUPDATESYSTEMID	VARCHAR2	32	N/A	Yes	N/A
PYLABEL	VARCHAR2	64	N/A	Yes	N/A
PYRULESETNAME	VARCHAR2	64	N/A	Yes	N/A
PZINSKEY	VARCHAR2	255	N/A	Yes	N/A
PZPVSTREAM	BLOB		N/A	Yes	N/A

Name	Data type	Size	Scale	Nulls?	Dflt
ID	VARCHAR2	20	N/A	Yes	N/A
EFFECTIVEDATE	VARCHAR2	20	N/A	Yes	N/A
TERMDATE	VARCHAR2	20	N/A	Yes	N/A
DESCRIPTION	VARCHAR2	255	N/A	Yes	N/A
EXPRESSIONNAME	VARCHAR2	20	N/A	Yes	N/A

### Constraints

Constraintname	IIF_SICDIVISION_PK
Type	PRIMARY
Disable	No
Referenced Schema	N/A
Referenced Table	N/A
Cascade On Delete	No
Check Condition	N/A
Deferrable?	No

Constraintname	IIF_SICDIVISION_PK
No Validate?	No
Initially Deferred?	No
RELY (Do Not Enforce)?	No

### Constraint column details

Column	Constraint	Referenced columns
ID	SYS_C0023923	N/A
EFFECTIVEDATE	SYS_C0023924	N/A

## IIF\_SICFACTOR

This table stores SIC information for all kinds of industry codes, including effective and termination dates, and SIC High and Low factors. This information will be picked up from this table while creating the policy from Pega Underwriting for Insurance.

### Columns

Name	Data type	Size	Scale	Nulls?	Dflt
PXCREATEDATETIME	DATE		N/A	Yes	N/A
PXCREATEOPNAME	VARCHAR2	128	N/A	Yes	N/A
PXCREATEOPERATOR	VARCHAR2	128	N/A	Yes	N/A
PXCREATESYSTEMID	VARCHAR2	32	N/A	Yes	N/A
PXINSNAME	VARCHAR2	128	N/A	Yes	N/A
PXOBJCLASS	VARCHAR2	96	N/A	Yes	N/A
PXUPDATEDATETIME	DATE		N/A	Yes	N/A
PXUPDATEOPNAME	VARCHAR2	128	N/A	Yes	N/A
PXUPDATEOPERATOR	VARCHAR2	128	N/A	Yes	N/A
PXUPDATESYSTEMID	VARCHAR2	32	N/A	Yes	N/A
PYLABEL	VARCHAR2	64	N/A	Yes	N/A
PYRULESETNAME	VARCHAR2	64	N/A	Yes	N/A
PZINSKEY	VARCHAR2	255	N/A	Yes	N/A
PZPVSTREAM	BLOB		N/A	Yes	N/A
DIVISIONID	VARCHAR2	20	N/A	Yes	N/A
EFFECTIVEDATE	VARCHAR2	20	N/A	No	N/A
TERMDATE	VARCHAR2	20	N/A	Yes	N/A
DESCRIPTION	VARCHAR2	255	N/A	Yes	N/A
EXPRESSIONNAME	VARCHAR2	20	N/A	Yes	N/A

Name	Data type	Size	Scale	Nulls?	Dflt
FACTOR	VARCHAR2	20	N/A	Yes	N/A
GROUPID	VARCHAR2	20	N/A	Yes	N/A
SICHIGH	VARCHAR2	20	N/A	No	N/A
SICLOW	VARCHAR2	20	N/A	No	N/A

## Constraints

Constraintname	IIF_SICFACTOR_PK
Type	PRIMARY
Disable	No
Referenced Schema	N/A
Referenced Table	N/A
Cascade On Delete	No
Check Condition	N/A
Deferrable?	No
No Validate?	No
Initially Deferred?	No
RELY (Do Not Enforce)?	No

## Constraint column details

Column	Constraint	Referenced columns
EFFECTIVEDATE	SYS_C0023926	N/A
SICHIGH	SYS_C0023927	N/A
SICLOW	SYS_C0023928	N/A



## IIF\_SICGROUP

This table stores SIC information for all kinds of industry group descriptions, including effective and termination dates. This information will be picked up from this table while creating the policy from Pega Underwriting for Insurance.

### Columns

Name	Data type	Size	Scale	Nulls?	Dflt
PXCREATEDATETIME	DATE		N/A	Yes	N/A
PXCREATEOPNAME	VARCHAR2	128	N/A	Yes	N/A
PXCREATEOPERATOR	VARCHAR2	128	N/A	Yes	N/A
PXCREATESYSTEMID	VARCHAR2	32	N/A	Yes	N/A
PXINSNAME	VARCHAR2	128	N/A	Yes	N/A
PXOBJCLASS	VARCHAR2	96	N/A	Yes	N/A
PXUPDATEDATETIME	DATE		N/A	Yes	N/A
PXUPDATEOPNAME	VARCHAR2	128	N/A	Yes	N/A
PXUPDATEOPERATOR	VARCHAR2	128	N/A	Yes	N/A
PXUPDATESYSTEMID	VARCHAR2	32	N/A	Yes	N/A
PYLABEL	VARCHAR2	64	N/A	Yes	N/A
PYRULESETNAME	VARCHAR2	64	N/A	Yes	N/A
PZINSKEY	VARCHAR2	255	N/A	Yes	N/A

Name	Data type	Size	Scale	Nulls?	Dflt
PZPVSTREAM	BLOB		N/A	Yes	N/A
DIVISIONID	VARCHAR2	20	N/A	Yes	N/A
EFFECTIVEDATE	VARCHAR2	20	N/A	No	N/A
TERMDATE	VARCHAR2	20	N/A	Yes	N/A

Name	Data type	Size	Scale	Nulls?	Dflt
DESCRIPTION	VARCHAR2	255	N/A	Yes	N/A
EXPRESSIONNAME	VARCHAR2	20	N/A	Yes	N/A
ID	VARCHAR2	20	N/A	No	N/A

## Constraints

Constraintname	IIF_SICGROUP_PK
Type	PRIMARY
Disable	No
Referenced Schema	N/A
Referenced Table	N/A
Cascade On Delete	No
Check Condition	N/A
Deferrable?	No
No Validate?	No
Initially Deferred?	No
RELY (Do Not Enforce)?	No

## Constraint column details

Column	Constraint	Referenced columns
EFFECTIVEDATE	SYS_C0023930	N/A
ID	SYS_C0023931	N/A

## IIF\_SICTONAICS

This table stores NAIC codes for all SIC codes and corresponding descriptions. This information will be picked up from this table while creating the policy from Pega Underwriting for Insurance.

Columns

Name	Data type	Size	Scale	Nulls?	Dflt
PXCREATEDATETIME	DATE		N/A	Yes	N/A
PXCREATEOPNAME	VARCHAR2	128	N/A	Yes	N/A
PXCREATEOPERATOR	VARCHAR2	128	N/A	Yes	N/A
PXCREATESYSTEMID	VARCHAR2	32	N/A	Yes	N/A
PXINSNAME	VARCHAR2	128	N/A	Yes	N/A

Name	Data type	Size	Scale	Nulls?	Dflt
PXOBJCLASS	VARCHAR 2	96	N/A	Yes	N/A
PXUPDATEDATETIME	DATE		N/A	Yes	N/A
PXUPDATEOPNAME	VARCHAR 2	128	N/A	Yes	N/A
PXUPDATEOPERATOR	VARCHAR 2	128	N/A	Yes	N/A
PXUPDATESYSTEMID	VARCHAR 2	32	N/A	Yes	N/A
PYLABEL	VARCHAR 2	64	N/A	Yes	N/A
PYRULESETNAME	VARCHAR 2	64	N/A	Yes	N/A

Name	Data type	Size	Scale	Nulls?	Dflt
PZINSKEY	VARCHAR 2	255	N/A	Yes	N/A
PZPVSTREAM	BLOB		N/A	Yes	N/A
NAICSCODE	VARCHAR 2	20	N/A	No	N/A
SICCODE	VARCHAR 2	20	N/A	No	N/A
NAICSCODEDESCRIPTION	VARCHAR 2	255	N/A	Yes	N/A
SICCODEDESCRIPTION	VARCHAR 2	255	N/A	Yes	N/A

## Constraints

Constraintname	IIF_SICTONAICS_PK
Type	PRIMARY
Disable	No
Referenced Schema	
Referenced Table	
Cascade On Delete	No
Check Condition	
Deferrable?	No
No Validate?	No
Initially Deferred?	No
RELY (Do Not Enforce)?	No

## Constraint column details

Column	Constraint	Referenced columns
NAICSCODE	SYS_C0023933	
SICCODE	SYS_C0023934	

**IIF\_VEHICLES**

This table stores vehicle make, model, and year of manufacture information. These details will be picked up from this table while creating the policy from Pega Underwriting for Insurance.

## Columns

Name	Data type	Size	Scale	Nulls?	Dflt
PXCREATEDATETIME	DATE			Yes	
PXCREATEOPNAME	VARCHAR 2	128		Yes	
PXCREATEOPERATOR	VARCHAR 2	128		Yes	
PXCREATESYSTEMID	VARCHAR 2	32		Yes	
PXINSNAME	VARCHAR 2	128		Yes	
PXOBJCLASS	VARCHAR 2	96		Yes	
PXUPDATEDATETIME	DATE			Yes	
PXUPDATEOPNAME	VARCHAR 2	128		Yes	

Name	Data type	Size	Scale	Nulls?	Dflt
PXUPDATEOPERATOR	VARCHAR 2	128		Yes	
PXUPDATESYSTEMID	VARCHAR 2	32		Yes	
PYLABEL	VARCHAR 2	64		Yes	
PYRULESETNAME	VARCHAR 2	64		Yes	
PZINSKEY	VARCHAR 2	255		No	
PZPVSTREAM	BLOB			Yes	
DESCRIPTION	VARCHAR 2	64		Yes	
MAKE	VARCHAR 2	64		Yes	
MODEL	VARCHAR 2	64		Yes	
VINPREFIX	VARCHAR 2	64		Yes	
YEAR	VARCHAR 2	64		Yes	

## Constraints

Constraint name	PEGAINS_INTERFACE_VEHICLES_PK
Type	PRIMARY
Disable	No



Constraint name	PEGAINS_INTERFACE_VEHICLES_PK
Referenced Schema	
Referenced Table	
Cascade On Delete	No
Check Condition	
Deferrable?	No
No Validate?	No
Initially Deferred?	No
RELY (Do Not Enforce)?	No

#### Constraint column details

Column	Constraint	Referenced columns
PZINSKEY	SYS_C0017547	

# Resources

The following table lists the PDFs/Excel files of Pega Foundation for Insurance for '23

Document type	Format
<a href="#">Pega Foundation for Insurance optimized sections</a>	XLSX
<a href="#">Pega Product Builder for Insurance user guide</a>	PDF
<a href="#">Pega Foundation for Insurance data model</a>	XLSX