



Compare / Canvas Onboarding Process Overview

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Summary

Compare and Canvas are cloud-based applications that are part of an application suite called Guidewire Live. Compare is a claims benchmarking tool that enables clients to create scenarios to compare claims KPI's within their company as well as against benchmarks from participating peer companies. Canvas is a geo-spatial tool that enables clients to evaluate claims and policy data geographically and overlay forecasted and historical weather event data to proactively manage response to weather events.

Guidewire Live sources required claims data from either on-prem or cloud based ClaimCenter systems and policy data from either cloud PolicyCenter or any on-prem policy admin system.



While the general process is the same, some differences do exist based on whether a source system is on-prem or cloud and whether you are provisioning Compare or Canvas (or both) and will be noted in the steps that follow.

If at any point you need assistance please open up a Community Support ticket and a member of the team will assist you.

Process Overview

The overall process consists of 4 phases as follows with typical durations noted in parentheses. It's important to note that while the durations can be a bit long, actual customer effort is minimal as Guidewire will do much of the work. Effort for on-prem systems will be higher than for cloud based systems.

- Phase 1 - Provision Application & Establish User Authentication (3-4 weeks for cloud, 6 to 8 for on-prem)
- Phase 2 - Extract Historical Claim Data (2 to 4 weeks)
- Phase 3 - Standardize Claims Data and Schedule Incremental Loads (2 to 4 weeks)
- Phase 4 - Load Policy Extract file (Canvas only - 2 to 3 weeks once policy extract is ready)
 - Note that work to generate the policy extract file can and should be started immediately so that the file is ready to load once Phase 4 is reached
- Phase 5 - Conduct Training

Phase 1 - Provision Application and Establish User Authentication

IdP Federation (on-prem customers only)

Customer who are solely on-prem and have not federated their Identity Provisioning system (IdP, used for single sign-on) with Guidewire will first need to do so. An overview of the IdP federation process can be found here: https://docs.guidewire.com/cloud/auth/latest/auth/topics/c_idp-setup-overview.html

1. Request creation of an IdP profile by opening a Community Support ticket using the following template: <https://docs.guidewire.com/cloud/requests/latest/idp/idp/IDP-0010/>



IDP-0010

Purpose of Ticket	Request to federate customer's IdP with Guidewire Hub
Expected Timeline	1 to 2 weeks
Prerequisite (If any)	Customer's tenant has been created
Effort	Medium
Output	<ul style="list-style-type: none"> • Guidewire Hub profile has been created and all IdP groups related to entitled applications and services are allowlisted in Guidewire Hub. • If email domains are included, routing rules will be updated. • Metadata file is sent to the customer contact. • By default, the first GWCP Guidewire Hub profile will be named [TenantID]-CORP.
Next Steps	IDP-0011

2. Once the ticket has been created and IdP metadata sent over you will need to configure your IdP system to create a service provider application and groups for your users.
3. Once your IdP configuration is complete, generate the IdP metadata and request that we process it by opening up a Community support ticket using the following template:

<https://docs.guidewire.com/cloud/requests/latest/idp/idp/IDP-0011/>

IDP-0011

Purpose of Ticket	Request to process customer's IdP metadata file.
Expected Timeline	1 to 2 weeks
Prerequisite (If any)	<ul style="list-style-type: none"> • Customer's IdP profile has been created in Guidewire Hub • Customer has configured their IdP • If applicable, customer has already obtained the necessary certificate • Customer has generated a metadata file and is ready to share it with Guidewire
Effort	Medium
Output	Guidewire will complete IdP federation using the metadata file provided by the customer.
Next Steps	GWLVE-0020





Request that Guidewire provisions the application (on-prem and cloud)

1. Request that Guidewire provisions and makes the relevant applications available to you by opening a Community Support ticket using the following template:

<https://docs.guidewire.com/cloud/requests/latest/analytics/gwlive/GWLVE-0020/>

GWLVE-0020

Purpose of Ticket	Provision Guidewire Live
Expected Timeline	3 to 4 weeks
Prerequisite (If any)	<ul style="list-style-type: none"> • Customer's subscription must include a Guidewire Live entitlement. • Customer's IdP has been federated with Guidewire Hub. • Production star system must be provisioned. • InsuranceSuite prod planet must be provisioned and deployed.
Effort	Medium
Output	<ul style="list-style-type: none"> • Guidewire Live has been provisioned. • Customer will update their IdP with necessary IdP groups and user assignments. • Customer will perform necessary next steps prior to requesting processing of data loads.
Next Steps	GWLVE-0030/GWLVE-0040 (for OnPrem cust. Only)

2. Note that this template is lengthy and has different values that must be provided depending on whether you are on-prem or in the cloud. Please provide ALL required fields and mark any non-applicable fields (e.g. if your ClaimCenter is in cloud for fields marked as 'required if ClaimCenter is on-prem) as "N/A". Failure to provide all information properly may result in your request being mis-routed and cause unnecessary delays.

Create User Groups (on-prem and cloud)

Once you have received notice that Guidewire Live has been provisioned you can set up and test your user access. Within your IdP system you will need to create user groups for the various applications and assign users to those groups and validate access following these steps



1. Create Groups as follows as listed on the following site:
 - a. https://docs.guidewire.com/cloud/dataplatform-admin/topics/r_groups_for_compa_re_and_canvas.html
2. Validate that users can login by going to <https://live.guidewire.net>. Upon successful login you should see a screen such as follows, though you may not see all the tiles based on what products you are authorized for:

The screenshot shows a user interface with a header for 'Scott FitzGerald' and a dropdown arrow. Below the header, there are four main tiles:

- Catastrophes:** Contains a table with columns 'Name', 'Date', and '# Claims'.

Name	Date ▼	# Claims
2024J - 2024J	Oct 4, 2024	111
2024i - 2024i	Sep 11, 2024	1570
2024G - 2024G	Aug 23, 2024	138
- Canvas:** Contains a calendar icon.
- Compare:** Contains a scales of justice icon.
- Spotlight:** Contains a magnifying glass icon over a map.

On the right side of the dashboard, there is a user profile section for 'Scott FitzGerald' with a dropdown arrow. Below the name, it says 'Latest Data Available' followed by 'Policy: Dec 12, 2024, 6:00 AM' and 'Claim: Dec 11, 2024, 8:53 PM'.



Phase 2 - Extract Historical Claims Data (on-prem ClaimCenter only)

This process will be performed by Guidewire for cloud based ClaimCenter systems. For on-prem systems you will need to follow this process.

Install the Data Extract Client (DEC)

The DEC is a lightweight java application that connects to both the Guidewire Live system in the cloud and your on-prem ClaimCenter database. Although the ongoing query load is very light we highly recommend that the DEC is pointed to a replica of your ClaimCenter db versus the live application db as best practice. Installation typically takes only a few hours.

1. As part of the request for provisioning Guidewire Live you should have been provided with a copy of the DEC, a set of installation instructions, and a clientid and secret for authentication
2. Install the application as directed and test your connection to validate that the DEC can communicate properly with both your ClaimCenter db and the Guidewire servers.

Create a Historical Extract File

This step will extract all historical claims from your ClaimCenter database and create a file that will be loaded into Guidewire Live.

1. Using the DEC run a FULL MODE extraction. We recommend running this extraction over a weekend as it will pull all your historical claims and can take the better part of a day.
2. You will upload the zip file to Guidewire using the Aspera file transfer application available with the Community Support area.



- Request that we process this file by opening up a Community Support ticket using the following template: <https://docs.guidewire.com/cloud/requests/latest/analytics/gwlive/GWLVE-0030/>

GWLVE-0030

Purpose of Ticket	Process Guidewire Live Initial Claims Data Load
Expected Timeline	1 to 2 weeks
Prerequisite (If any)	<ul style="list-style-type: none"> • Guidewire Live has been provisioned for customer. • Customer has completed post provisioning steps. • Customer has uploaded the initial claims data load to Aspera.
Effort	Medium
Output	Initial claims data load is processed.
Next Steps	Standardize the Claims Data

Phase 3 - Standardize Claims Data and Schedule Incremental Loads

Standardize Data (Compare only)

For the Compare application claims data must be standardized between customers so that apples to apples comparisons can be made across companies. As an example most companies create different loss cause values. One company may use “Rear-end collision” while another may use “Hit in rear.” Guidewire performs standardization to map LOBs, coverages, loss causes, etc.. to a common set of values for benchmarking purposes.

Note that while this step is largely performed by Guidewire you will need to assign a point contact to answer questions that may arise during initial mapping by Guidewire (we typically don’t know what your “Gold Endorsement covers”) and who will coordinate a final review.

Standardization steps are as follows:

- Guidewire will perform an initial data mapping or standardization using the values seen in the historical data file that was uploaded
- Guidewire will provide the standardization file and a list of outstanding questions to the designated customer contact to review.



3. Once corrections and sign-off have been provided Guidewire will load the mappings and prepare the system for incremental data updates.

Schedule Incremental Loads

Incremental loads ensure that the claims data for Compare and Canvas are up to date within the applications. These data loads are delta loads and generally run very quickly. For most customers a single daily load is sufficient. However, for customer who are using Canvas and have a very Catastrophe prone book (e.g. Florida property) incrementals can be scheduled to run as often as every 3-4 hours so that data can be updated during the day.

1. After notification from Guidewire, on-prem ClaimCenter customers will need to schedule the incremental claims job using the DEC. Follow the DEC instructions for “Incremental Mode.”
 - a. Please do not schedule jobs during the following data maintenance windows:
 - i. 1:00am to 3:00am Pacific
 - ii. 11:00am to 1:00pm Pacific
2. For cloud ClaimCenter customers no action is necessary, Guidewire will schedule the incremental claims jobs.

Phase 4 - Load Policy Extract File (Canvas only)

This process loads the required policy files used for Canvas into the system and schedules incremental updates. The policy file needs to conform with the provided standards and layout. Best practice is to provide an initial file with all historical records and then daily incremental files with all new records (bound, changed, etc..) since the last file was produced.

- The policy file layout for on-prem customers will be provided to you during provisioning
- Cloud customer should follow the instructions here to produce their policy file extract:
<https://docs.guidewire.com/cloud/canvas/latest/topics/PolicyCenterExport.html>

Install the DEC (on-prem policy customers, if not done prior)

The DEC is a lightweight java application that connects to both the Guidewire Live system in the cloud and your on-prem ClaimCenter database. Although the ongoing query load is very light we highly recommend that the DEC is pointed to a replica of your ClaimCenter db versus the live application db as best practice. Installation typically takes only a few hours.



3. As part of the request for provisioning Guidewire Live you should have been provided with a copy of the DEC, a set of installation instructions, and a clientid and secret for authentication
4. Install the application as directed and test your connection to validate that the DEC can communicate properly with both your ClaimCenter db and the Guidewire servers.

Policy File Upload (on-prem customers)

1. On-prem policy system customers will need to generate the policy file using any method available to them and schedule the creation and storing of the file in a system location reachable by the DEC.
2. Manually run a policy file upload from the DEC for the initial policy file will all historical policies following the DEC instructions.
3. Schedule the generation of the incremental policy file to drop in a location reachable to the DEC
4. Schedule the policy file upload from the DEC following the DEC instructions
 - a. Please do not schedule jobs during the following data maintenance windows:
 - i. 1:00am to 3:00am Pacific
 - ii. 11:00am to 1:00pm Pacific

Policy File Upload (cloud PolicyCenter customers)

1. Once the historical PolicyCenter extract file is available in production and stored in S3, request that the data is loaded by opening a Community Support ticket using the following template:

<https://docs.guidewire.com/cloud/requests/latest/analytics/gwlive/GWLVE-0040/>

GWLVE-0040

Purpose of Ticket	Process Guidewire Live Policy Data Load. Request type only valid for policy data coming from PolicyCenter on GWCP and does not apply to DEC upload scenarios.
Expected Timeline	2 to 3 weeks
Prerequisite (If any)	<ul style="list-style-type: none"> Guidewire Live has been provisioned for customer. Customer has completed post provisioning steps. Source of policy data is PolicyCenter hosted in GWCP (does not apply to DEC upload scenarios). Customer has uploaded extract file to a Guidewire provided S3 bucket
Effort	Medium
Output	Policy data load is processed.
Next Steps	Run a dry run to validate Guidewire Canvas





2. Once the historical policy file has been processed schedule the daily incremental policy file extracts to run and notify Guidewire Support when they will be available.
3. Guidewire will then schedule the processing of the policy extract files

Phase 5 - Schedule Training

Initial training is provided by Guidewire. Typically 1 hour each for Compare and Canvas is sufficient. Training is conducted remotely. Please contact your Customer Success Manager (CSM) to schedule this training.

Once initial training is completed Guidewire is happy to host “office hours” on a bi-weekly or monthly basis as your team gets started. These are informal sessions where you can bring questions or scenarios and Guidewire can answer them and provide tips and tricks on how to get the most out of the applications.