

Appendix 5 - Inquiry Screen Configuration

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Inquiry Screen

Description

The Inquiry Screen enables users to access information via a rules defined format. The rule can be created at the Main Menu, Client or Policy Level. The Level determines the screen that this Inquiry Screen can be accessed from. It also determines which GUID is passed to the Inquiry Screen Rule: PrimaryCompanyGUID for Main Menu, ClientGUID for Client or PolicyGUID for Policy.

InquiryScreen Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Data Type		
<InquiryScreen> </InquiryScreen>	The opening and closing elements of this business rule. Required		
<Input>	Required - Defines the Input Section of the Inquiry Screen.		
<Fields>	Used in both Input and Output section – required tags are <Name>, <Display> and <DataType> For MATH TYPE Output Fields the name must match a variable name exactly.		
<Output>	Required - Defines the Output Section of the Inquiry Screen. Configured differently for MATH vs. SQL Types		
<Result>	DISPLAY="String"	Required - Name of Result Set.	
<Table>	Used when QueryType="SQL" to indicate that results will be returned in table format		
<Query>	TYPE	SQL MATH	TYPE is required & indicates whether data will be retrieved via SQL or through Math Variables
	VALUATION	Yes No	VALUATION tag determines if Valuation is executed. If yes ValuationXML values are available for Math processing.
<Column>	Used when Query TYPE="SQL" to define Table. Standard Column attributes are available. See Transaction Configuration Section for detailed information.		
<Display>	Used when Query TYPE="SQL" to define Table		
<FreezeColumns>	Determines the number of left justified columns to freeze on the screen when using the scroll arrows		
<Name>	Used when Query TYPE="SQL" to define Table		
<MathVariables>	Used when Query TYPE="MATH" Standard MathVariables functionality TYPES and Attributes are available. See Transaction Configuration Section for detailed information.		

Inquiry Screen Image

Payment Report

[Payment Report](#)

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Page 1 2 3 4 5 6 7 8 9 10 11 12 13
14 15 16 17 18 19 20 21 22 23 24
25 26 27 28 29 30 31

Maximum Results: 10

Plan Name	Policy Number	Entry Date	Policy Status	Role	<< >>
UL	UL30009245	03/06/2007	Pending	Insured	
UL	UL30008805	11/22/2006	Active	Insured	
ACME Term	Term30008997	01/29/2007	Pending	Insured	
UL	UL30008801	11/20/2006	Active	Insured	
UL	UL30008802	11/20/2006	Pending	Insured	
UL	UL30008800	11/16/2006	Active	Insured	
UL	UL30008798	11/14/2006	Active	Insured	
UL	UL30008795	11/13/2006	Pending	Insured	
UL	UL30008797	11/14/2006	Active	Insured	
UL	UL30008794	11/13/2006	Active	Insured	

```

<InquiryScreen>
  <Input>
    <Fields>
      <Field>
        <Name>FromEffectiveDate</Name>
        <Display>From Date</Display>
        <DataType>Date</DataType>
      </Field>
      <Field>
        <Name>ToEffectiveDate</Name>
        <Display>To Date</Display>
        <DataType>Date</DataType>
      </Field>
    </Fields>
  </Input>
  <Output>
    <Result DISPLAY="Payment Report">
      <Table>
        <FreezeColumns>2</FreezeColumns>
        <Results>
          <Query TYPE="SQL">SELECT AsPlan.PlanName, AsPolicy.PolicyNumber, CAST
(AsPolicy.CreationDate AS DATE) CreationDate, AsPolicy.StatusCode, PolicyAsCodeStatus.ShortDescription
PolicyStatusDescription, AsRole.RoleCode, RoleAsCodeRole.ShortDescription RoleDescription, AsClient.LastName,
AsClient.FirstName, AsClient.MiddleInitial, AsClient.DateOfBirth FROM AsPolicy JOIN AsPlan ON AsPolicy.PlanGUID =
AsPlan.PlanGUID JOIN AsRole ON AsPolicy.PolicyGUID = AsRole.PolicyGUID JOIN AsCode RoleAsCodeRole ON
RoleAsCodeRole.CodeName = 'AsCodeRole' AND RoleAsCodeRole.CodeValue = AsRole.RoleCode JOIN AsCode
PolicyAsCodeStatus ON PolicyAsCodeStatus.CodeValue = AsPolicy.StatusCode AND PolicyAsCodeStatus.CodeName =

```

'AsCodeStatus' JOIN AsClient ON AsRole.ClientGUID = AsClient.ClientGUID WHERE AsRole.RoleCode IN ('98', '38', '37', '25', '21') AND CAST (AsPolicy.CreationDate AS DATE) >= CAST ('[FromEffectiveDate]' AS DATE) AND CAST (AsPolicy.CreationDate AS DATE) <= CAST ('[ToEffectiveDate]' AS DATE)</Query>

```

</Results>
<Column WIDTH="100" ALIGN="LEFT">
  <Display>Plan Name</Display>
  <Name>PlanName</Name>
  <DataType>Text</DataType>
</Column>
<Column WIDTH="155" ALIGN="LEFT">
  <Display>Policy Number</Display>
  <Name>PolicyNumber</Name>
  <DataType>Text</DataType>
</Column>
<Column WIDTH="110" ALIGN="CENTER">
  <Display>Entry Date</Display>
  <Name>CreationDate</Name>
  <DataType>Date</DataType>
</Column>
<Column WIDTH="150" ALIGN="CENTER">
  <Display>Policy Status</Display>
  <Name>PolicyStatusDescription</Name>
  <DataType>Text</DataType>
</Column>
<Column WIDTH="150" ALIGN="LEFT">
  <Display>Role</Display>
  <Name>RoleDescription</Name>
  <DataType>Text</DataType>
</Column>
<Column WIDTH="155" ALIGN="MIDDLE">
  <Display>Last Name</Display>
  <Name>LastName</Name>
  <DataType>Text</DataType>
</Column>
<Column WIDTH="155" ALIGN="LEFT">
  <Display>First Name</Display>
  <Name>FirstName</Name>
  <DataType>Text</DataType>
</Column>
<Column WIDTH="85" ALIGN="LEFT">
  <Display>MI</Display>
  <Name>MiddleInitial</Name>
  <DataType>Text</DataType>
</Column>
<Column WIDTH="85" ALIGN="CENTER">
  <Display>DOB</Display>
  <Name>DateOfBirth</Name>
  <DataType>Date</DataType>
</Column>
</Table>
</Result>
</Output>
</InquiryScreen>

```