

Section 5 - Documents

Table of Contents

Creating a Document in the OIPA System	3
Adding a Document Transaction.....	3
Adding the ReportFile Business Rule	6
Adding the TransactionCosmetics Business Rule	8
Adding the TransactionBusinessRulePacket business rule.....	9
Creating ReportFile, TransactionCosmetics, and TransactionBusinessRulesPacket	10

Creating a Document in the OIPA System

Setting up documents in the OIPA system is a four-step process.

- Add a document transaction (e.g. Policy Pages).
- Add the **ReportFile** business rule, upload a report, and attach it to the document transaction.
- Add the **TransactionCosmetics** business rule and attach it to the document transaction.
- Add the **TransactionBusinessRulePacket** business rule and attach it to the document transaction.

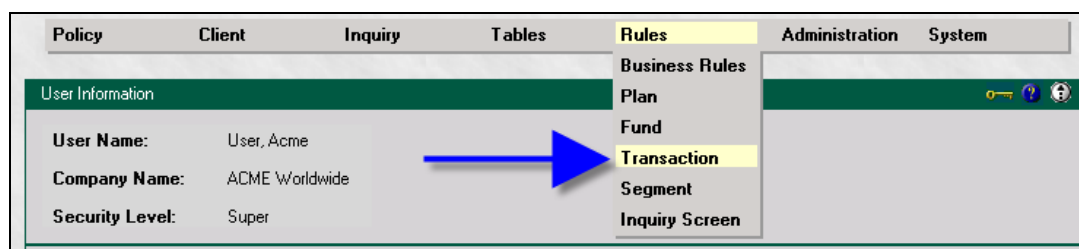
A document is like any other activity in the system in that it is defined by a transaction record. This may or may not be triggered (spawned) by another transaction, such as a policy level document transaction.

Adding a Document Transaction

The first step when adding a new document to the system is to add a transaction for the document. This is done through the Transactions page under the Rules heading on the main menu.

Add a Document Transaction

1. From the Main Menu, select **Rules**, then **Transaction**, The Transaction page will open.



2. Select a document type. The new document type could be policy level, plan level, or cycle level.

3. Go into the Transaction screen. Choose the company from the **Carrier** combo box on the left side and choose the appropriate **Plan** on the right side. The example shown creates a policy document.

4. Choose a **Name**, **Type**, and **Order** for the transaction.
 - a. Name: the name of the transaction.
 - b. Type: specifies the level in which the document will be viewable.
 - c. Order: specifies the order in which the transaction should be processed.

XML scripting is used to determine the behavior of a given transaction and is added to the **XMLData** section of the Policy Page. Document transactions function similar to financial transactions in that they allow the user to initialize and define variables in order to produce the required output. Document transactions require certain tags in order to function properly. If variables will be used, the math section is needed and the variables will be described there.

In order to gather information for the report, such as policy number, owner name, and effective date of the transaction, parameters need to be passed to the stored procedure. One or more parameters can be used for any report. The most commonly used parameters are PlanGUID, ActivityGUID, and PolicyGUID. Any field available from the XMLData of the document activity can be used in the report data source (stored procedure). At runtime, the document component references the activity XMLData for the field values and passes them on to the stored procedure.

When creating a document transaction, a stored procedure is used to gather information from the database and pass it to the Crystal object. Creating a stored procedure and a Crystal report are described later in this section. For the purpose of this example, the Policy Page transaction will need to

pass a PolicyGUID to the Crystal report. The XML needed for the Policy Page transaction is listed here and described in the following chart.

<Transaction>
Starting tag.
<EffectiveDate STATUS="Disabled" TYPE="SYSTEM"></EffectiveDate> <i>Describes the Effective Date Field. The Status "Disabled" does not allow the user to changes the date of the transaction – "Enable" does. The TYPE "System" allows the system date to be used as the Effective Date.</i>
<Math>activity <i>Math variables used by the .</i> <MathVariables> <MathVariable VARIABLENAME="PolicyGUID"TYPE="VALUE"></MathVariable> <MathVariable VARIABLENAME="PolicyGUID" TYPE="FIELD">Policy:PolicyGUID</MathVariable> </MathVariables> </Math>
<Query>asr_AsPolicyPageDocument '[PolicyGUID]' <i>Query tells the application to run this query, including any variables.</i>
</Transaction>
Ending tag.

In this example, the Policy Page transaction essentially runs a stored procedure named **asr_AsPolicyPageDocument** and passes the **PolicyGUID**.

5. Add the above XML to the Policy Page transaction and select **Check In** to save the transaction.
6. Select **Close**.

Adding the ReportFile Business Rule

Each document transaction requires three business rules:

- ReportFile
- TransactionRulesPacket
- TransactionCosmetics

Add the Report File Business Rule

1. Close out of the transaction page and go to the Main Menu.
2. Select **Rules** and then **BusinessRules**.
3. Choose **ReportFile** as the Rule.
4. Select the plan that will use this document as the **Filter**.

The screenshot shows the 'Business Rules' configuration window. At the top, there are two dropdown menus: 'Rule:' and 'Filter:'. The 'Rule:' dropdown is set to 'ReportFile*' and the 'Filter:' dropdown is set to 'ACME-ACME Annuity (01/01/2000)'. Below these, there is a table titled 'Global/Override(s)'. The table has columns for 'Carrier', 'Plan', 'Fund', 'Transaction', and 'State'. There is a single row labeled '(Global)'. At the bottom of the window, there is a status bar that says 'Page 1 of 1', 'Page 1', and 'Maximum Results: 20'.

5. Select **New**.

The screenshot shows the 'Business Rules' window. At the top, there's a 'Rule:' dropdown set to 'ReportFile*' and a 'Filter:' dropdown set to 'ACME-ACME Annuity (01/01/2000)'. Below this is a 'Global/Override(s)' section with a table:

Carrier	Plan	Fund	Transaction	State	
ACME	ACME Annuity(01/01/2000)		PolicyPrint		>>

Below the table is the 'Rule Detail' section. It contains several fields: 'Rule Name' (ReportFile), 'Rule Type' (Natural File), 'Long Name' (ReportFile), 'Keywords' (ReportFile), 'Comments' (ReportFile), 'Error Message' (empty), and 'XML Data' (containing an XML snippet). At the bottom of the 'Rule Detail' section, there are four buttons: 'Attach', 'New', 'Check Out', and 'Close'. A large red arrow points directly to the 'New' button.

6. A pop-up window will open. Select the plan and the created transaction.

The screenshot shows a pop-up window titled 'New Override for ReportFile'. It contains several dropdown menus and text fields: 'Carrier', 'Plan', 'Fund', 'Transaction', 'State', 'Client', 'Policy', 'Segment', and 'Activity'. The 'Transaction' dropdown is currently open, showing a list of options, with 'ACME-ACME Annuity (01/01/2000)-Policy Page' selected. A black arrow points to the 'Transaction' dropdown. At the bottom of the window are 'OK' and 'Cancel' buttons.

Adding the TransactionCosmetics Business Rule

Add TransactionCosmetics Business Rule

1. Close out of the transaction page and go to the Main Menu.
2. Select **Rules** and then **BusinessRules**.
3. Choose **TransactionCosmetics** as the Rule.
4. Select the plan for which this document will be available as the **Filter**.

Business Rules

Rule: TransactionCosmetics* Filter: ACME-ACME Annuity (01/01/2000)

Global/Override(s)

Carrier	Plan	Fund	Transaction	State
(Global)				

Rule Detail

Rule Name: TransactionCosmetics Rule Type: Natural

Long Name: Page cosmetics for a transaction

Keywords: Transaction Comments: Page cosmetics for a transaction

Error Message:

XML Data:

```
<TransactionCosmetics>
  <Icon>AsIconDelivery.GIF</Icon>
  <Button>AsButtonDelivery.GIF</Button>
  <Reverse>AsReverseDelivery.GIF</Reverse>
</TransactionCosmetics>
```

Attach New Check Out Close

5. A pop-up window will open. Select the plan and the created transaction.

New Override for TransactionCosmetics

Carrier: Plan: Fund: Transaction: ACME-ACME Annuity (01/01/2000)-Policy Page State: Client: Policy: Segment: Activity:

OK Cancel

Adding the TransactionBusinessRulePacket business rule

Add TransactionBusinessRulePacket Business Rule

1. Close out of the transaction page and go to the Main Menu.
2. Select **Rules** and then **BusinessRules**.
3. Select **TransactionBusinessRulesPacket** as the **Rule**.
4. Select the plan for which this document will be available as the **Filter**.

Business Rules

Rule: TransactionBusinessRulePacket* Filter: ACME-ACME Annuity (01/01/2000)

Global/Override(s)

Carrier	Plan	Fund	Transaction	State	>>
ACME	ACME Annuity(01/01/2000)		Illustration		

Rule Detail

Rule Name: TransactionBusinessRulePacket Rule Type: Natural

Long Name: List of Business Rules for a transaction

Keywords: Transaction,Business Rules Comments: List of Business Rules for a transaction

Error Message:

XML Data: <TransactionBusinessRulePacket><Rule>ReportFile</Rule></TransactionBusinessRulePacket>

Attach New Check Out Close

5. A pop up will open. Choose the plan being worked on and the created transaction.

New Override for TransactionCosmetics

Carrier: Plan: Fund: Transaction: ACME-ACME Annuity (01/01/2000)-Policy Page State: Client: Policy: Segment: Activity:

OK Cancel

Creating ReportFile, TransactionCosmetics, and TransactionBusinessRulesPacket

To create the ReportFile, TransactionCosmetics, and TransactionBusinessRulesPacket business rules, choose the new transaction named PolicyPage.

Report File

Add the following XML:

```
<NaturalFile>{368337F1-0193-4866-9E00-613CBFC50AED}</NaturalFile>
```

Note: A new GUID is created each time a report is uploaded.

TransactionCosmetics - Defines the "look" of the transaction.

Add the following XML:

```
<TransactionCosmetics>  
  <Icon>AsIconIssue.GIF</Icon>  
  <Button>AsButtonIssue.GIF</Button>  
  <Reverse>AsReverseIssue.GIF</Reverse>  
</TransactionCosmetics>
```

TransactionBusinessRulesPacket - Lists all business rules related to the transaction that are needed to process the transaction.

Add the following XML:

```
<TransactionBusinessRulePacket>  
  <Rule>ReportFile</Rule>  
</TransactionBusinessRulePacket>
```

Note: New images may be created or existing images may be used.