

# **Business Rule Configuration Part 2**

## Table of Contents

<b>1. DAYSINYEAR .....</b>	<b>8</b>
DESCRIPTION .....	8
DAYSINYEAR ELEMENT\ATTRIBUTE TABLE .....	8
XML EXAMPLE .....	8
<b>2. DEFAULTCURRENCY .....</b>	<b>8</b>
DESCRIPTION .....	8
DEFAULTCURRENCY ELEMENT\ATTRIBUTE TABLE .....	8
XML EXAMPLE .....	8
<b>3. DEFAULTUNITVALUE.....</b>	<b>8</b>
DESCRIPTION .....	8
DEFAULTUNITVALUE ELEMENT\ATTRIBUTE TABLE .....	8
XML EXAMPLE .....	8
<b>4. DELETEACTIVITY .....</b>	<b>9</b>
DESCRIPTION .....	9
DELETEACTIVITY ELEMENT\ATTRIBUTE TABLE .....	9
XML EXAMPLE .....	9
<b>5. DELETEROLES .....</b>	<b>10</b>
DESCRIPTION .....	10
DELETEROLES ELEMENT\ATTRIBUTE TABLE .....	10
<b>6. DELIVERYREQUIREMENTS.....</b>	<b>10</b>
DESCRIPTION .....	10
DELIVERYREQUIREMENTS ELEMENT\ATTRIBUTE TABLE .....	10
DELIVERYREQUIREMENTS IMAGES.....	11
DATABASE TABLES FOR DELIVERYREQUIREMENTS.....	12
XML EXAMPLE .....	12
<b>7. DISBURSEMENTAPPROVAL SCREEN .....</b>	<b>13</b>
DESCRIPTION .....	13
DISBURSEMENTAPPROVALSCREEN ELEMENT\ATTRIBUTE TABLE .....	13
DISBURSEMENTAPPROVALSCREEN IMAGES .....	14
DATABASE TABLES FOR DISBURSEMENTAPPROVALSCREEN .....	14
XML EXAMPLES .....	14
<b>8. DISBURSEMENTNUMBER .....</b>	<b>16</b>
DESCRIPTION .....	16
DISBURSEMENTNUMBER ELEMENT\ATTRIBUTE TABLE .....	16
<b>9. DISBURSEMENTRULE .....</b>	<b>17</b>
DESCRIPTION .....	17
DISBURSEMENTRULE ELEMENT\ATTRIBUTE TABLE .....	17
XML EXAMPLE .....	18
<b>10. DISBURSEMENTSCREEN.....</b>	<b>19</b>

DESCRIPTION .....	19
DISBURSEMENTSCREEN ELEMENT \ ATTRIBUTE TABLE .....	19
DISBURSEMENTSCREEN IMAGES .....	20
DATABASE TABLES FOR DISBURSEMENTSCREEN .....	20
XML EXAMPLE .....	20
<b>11. DISBURSEMENTSEARCHSCREEN .....</b>	<b>21</b>
DESCRIPTION .....	21
DISBURSEMENTSEARCHSCREEN ELEMENT \ ATTRIBUTE TABLE .....	21
DISBURSEMENTSEARCHSCREEN IMAGE.....	23
DISBURSEMENTSEARCHSCREEN DATABASE TABLES.....	23
XML EXAMPLE .....	23
<b>12. DOABLTRANSFER .....</b>	<b>24</b>
DESCRIPTION .....	24
DOABLTRANSFER ELEMENT \ ATTRIBUTE TABLE.....	25
XML EXAMPLE .....	26
<b>13. DOANNUITYRECALCULATION .....</b>	<b>26</b>
DESCRIPTION .....	26
DOANNUITYRECALCULATION ELEMENT \ ATTRIBUTE TABLE.....	27
XML EXAMPLE .....	29
<b>14. DOBENEFITSPLIT .....</b>	<b>29</b>
DESCRIPTION .....	29
DOBENEFITSPLIT ELEMENT \ ATTRIBUTE TABLE .....	30
XML EXAMPLE .....	31
<b>15. DOBENEFITSPLITCHANGE .....</b>	<b>31</b>
DESCRIPTION .....	31
DOBENEFITSPLITCHANGE ELEMENT \ ATTRIBUTE TABLE.....	32
XML EXAMPLE .....	33
<b>16. DOCUMENTCOSMETICS .....</b>	<b>34</b>
DESCRIPTION .....	34
DOCUMENTCOSMETICS ELEMENT \ ATTRIBUTE TABLE.....	34
XML EXAMPLE .....	34
<b>17. DOSEGMENTRECALCULATION .....</b>	<b>34</b>
DESCRIPTION .....	34
DOSEGMENTRECALCULATION ELEMENT \ ATTRIBUTE TABLE .....	34
XML EXAMPLE .....	36
<b>18. DOWITHDRAWALSPLIT.....</b>	<b>36</b>
DESCRIPTION .....	36
DOWITHDRAWALSPLIT ELEMENT \ ATTRIBUTE TABLE.....	36
XML EXAMPLE .....	37
<b>19. DUPLICATECLIENT .....</b>	<b>38</b>
DESCRIPTION .....	38
DUPLICATECLIENT ELEMENT \ ATTRIBUTE TABLE .....	38
XML EXAMPLE .....	39
<b>20. DUPLICATEPOLICY.....</b>	<b>39</b>
DESCRIPTION .....	39

DUPLICATEPOLICY ELEMENT\ATTRIBUTE TABLE.....	39
XML EXAMPLE .....	39
<b>21. ELIGIBLESEGMENTNAMESBYPOLICYSTATUS .....</b>	<b>40</b>
DESCRIPTION .....	40
ELIGIBLESEGMENTNAMESBYPOLICYSTATUS ELEMENT\ATTRIBUTE TABLE .....	40
XML EXAMPLE .....	40
<b>22. ELIGIBLETRANSACTIONSByPOLICYSTATUS .....</b>	<b>41</b>
DESCRIPTION .....	41
ELIGIBLETRANSACTIONSByPOLICYSTATUS ELEMENT\ATTRIBUTE TABLE.....	41
XML EXAMPLE: .....	43
<b>23. EXTENSIONS.....</b>	<b>44</b>
DESCRIPTION .....	44
EXTENSIONS ELEMENT\ATTRIBUTE TABL .....	44
<b>24. EXTERNALPROCESS.....</b>	<b>44</b>
DESCRIPTION .....	44
COPYTOBUSINESSRULES ELEMENT\ATTRIBUTE TABLE .....	44
<b>25. EXTRACTDETAILS .....</b>	<b>44</b>
DESCRIPTION .....	44
EXTRACTDETAILS ELEMENT\ATTRIBUTE TABLE .....	44
XML EXAMPLE .....	45
<b>26. FIELDSAREEQUAL.....</b>	<b>46</b>
DESCRIPTION .....	46
FIELDSAREEQUAL ELEMENT\ATTRIBUTE TABLE .....	46
XML EXAMPLE .....	46
<b>27. FREEAMOUNTFORMULA .....</b>	<b>46</b>
DESCRIPTION .....	46
FREEAMOUNTFORMULA ELEMENT\ATTRIBUTE TABLE.....	46
XML EXAMPLE .....	47
<b>28. FUNDFILLMETHOD .....</b>	<b>48</b>
DESCRIPTION .....	48
FUNDFILLMETHOD ELEMENT\ATTRIBUTE TABLE.....	48
XML EXAMPLE .....	48
<b>29. FUNDLISTFORALLOCATION.....</b>	<b>48</b>
DESCRIPTION .....	48
FUNDLISTFORALLOCATION ELEMENT\ATTRIBUTE TABLE .....	48
XML EXAMPLE .....	50
<b>30. FUNDSCREEN.....</b>	<b>50</b>
DESCRIPTION .....	50
FUNDSCREEN ELEMENT\ATTRIBUTE TABLE .....	50
FUNDSCREEN IMAGE .....	53
FUND SCREEN DATABASE TABLES.....	54
XML EXAMPLE .....	54
<b>31. FUTURENUVENTRY .....</b>	<b>55</b>
DESCRIPTION .....	55

FUTURENUVENTRY ELEMENT\ATTRIBUTE TABLE .....	55
XML EXAMPLE .....	55
<b>32. GAINLOSSCALCULATIONS .....</b>	<b>55</b>
DESCRIPTION .....	55
GENERATEADDRESSCHANGELETTER ELEMENT\ATTRIBUTE TABLE .....	56
<b>33. GENERATEADDRESSCHANGELETTER .....</b>	<b>56</b>
DESCRIPTION .....	56
GENERATEADDRESSCHANGELETTER ELEMENT\ATTRIBUTE TABLE .....	56
XML EXAMPLE .....	56
<b>34. GENERATEEXTRACTWEBSERVICE .....</b>	<b>57</b>
DESCRIPTION .....	57
GENERATEEXTRACTWEBSERVICE ELEMENT\ATTRIBUTE TABLE.....	57
XML EXAMPLE .....	57
<b>35. GENERATEGROUPDETAIL .....</b>	<b>57</b>
DESCRIPTION .....	57
GENERATEGROUPDETAIL ELEMENT\ATTRIBUTE TABLE .....	57
XML EXAMPLE .....	57
<b>36. GENERATEINSERTGRAM .....</b>	<b>58</b>
DESCRIPTION .....	58
GENERATEINSERTGRAM ELEMENT\ATTRIBUTE TABLE .....	58
<b>37. GENERATEPENDINGREQUIREMENTS .....</b>	<b>58</b>
DESCRIPTION .....	58
GENERATEPENDINGREQUIREMENTS ELEMENT\ATTRIBUTE TABLE .....	59
GENERATEPENDINGREQUIREMENTS IMAGES .....	62
DATABASE TABLES FOR GENERATEPENDINGREQUIREMENTS .....	63
XML EXAMPLE .....	63
<b>38. GENERATEREPORT.....</b>	<b>64</b>
DESCRIPTION .....	64
GENERATEREPORT ELEMENT\ATTRIBUTE TABLE .....	64
<b>39. GENERATESUSPENSE .....</b>	<b>64</b>
DESCRIPTION .....	64
GENERATESUSPENSE ELEMENT\ATTRIBUTE TABLE .....	65
<b>40. GENERATESUSPENSEACCOUNTING .....</b>	<b>71</b>
DESCRIPTION .....	71
GENERATESUSPENSEACCOUNTING ELEMENT\ATTRIBUTE TABLE .....	71
XML EXAMPLE .....	71
<b>41. GHOSTPOLICY .....</b>	<b>71</b>
DESCRIPTION .....	71
GHOSTPOLICY ELEMENT\ATTRIBUTE TABLE.....	71
GHOSTPOLICY IMAGE .....	72
XML EXAMPLE .....	72
<b>42. GUARANTEEDRATE .....</b>	<b>72</b>
DESCRIPTION .....	72
GUARANTEEDRATE ELEMENT\ATTRIBUTE TABLE.....	72

XML EXAMPLE .....	72
<b>43. GUIDELINEVALIDATION .....</b>	<b>72</b>
DESCRIPTION .....	72
GUIDELINEVALIDATION ELEMENT\ATTRIBUTE TABLE .....	72
XML EXAMPLE .....	73
<b>44. INACTIVESEGMENTS.....</b>	<b>73</b>
DESCRIPTION .....	73
INACTIVESEGMENTS ELEMENT\ATTRIBUTE TABLE .....	73
XML EXAMPLE .....	73
<b>45. INTERESTRATECODE.....</b>	<b>73</b>
DESCRIPTION .....	73
INTERESTRATECODE ELEMENT\ATTRIBUTE TABLE .....	73
XML EXAMPLES .....	75
<b>46. INTERESTRATECRITERIA .....</b>	<b>76</b>
DESCRIPTION .....	76
INTERESTRATECRITERIA ELEMENT\ATTRIBUTE TABLE .....	76
XML EXAMPLE .....	77
<b>47. LAPSETEST.....</b>	<b>77</b>
DESCRIPTION .....	77
LAPSETEST ELEMENT\ATTRIBUTE TABLE .....	77
XML EXAMPLE .....	78
<b>48. MAPSCREEN.....</b>	<b>78</b>
DESCRIPTION .....	78
MAPSCREEN ELEMENT\ATTRIBUTE TABLE .....	78
<b>49. MASKS.....</b>	<b>78</b>
DESCRIPTION .....	78
MASKS ELEMENT\ATTRIBUTE TABLE .....	79
XML EXAMPLE .....	80
<b>50. MAXIMUMVALUE .....</b>	<b>80</b>
DESCRIPTION .....	80
MAXIMUMVALUE ELEMENT\ATTRIBUTE TABLE .....	80
XML EXAMPLE .....	80
<b>51. MIGRATIONSCREEN .....</b>	<b>81</b>
DESCRIPTION .....	81
MIGRATIONSCREEN ELEMENT \ ATTRIBUTE TABLE .....	81
MIGRATIONSCREEN IMAGE.....	81
DATABASE TABLES FOR MIGRATIONSCREEN .....	81
XML EXAMPLE .....	81
<b>52. MINIMUMVALUE .....</b>	<b>82</b>
DESCRIPTION .....	82
MINIMUMVALUE ELEMENT\ATTRIBUTE TABLE .....	82
XML EXAMPLE .....	82
<b>53. MORTALITYTABLE.....</b>	<b>83</b>
DESCRIPTION .....	83

MORTALITYTABLE ELEMENT\ATTRIBUTE TABLE .....	83
XML EXAMPLE .....	83
<b>54. MULTIFIELDS .....</b>	<b>83</b>
DEFINITION - OVERALL .....	83
MULTIFIELDS RULE TABLE – 1 .....	83
DEFINITION - 1 .....	83
MULTIFIELDS ELEMENTS\ATTRIBUTE TABLE .....	84
XML EXAMPLE: .....	87
MULTIFIELDS - 2 .....	87
DESCRIPTION - 2 .....	87
MULTIFIELDS ELEMENTS\ATTRIBUTE TABLE .....	87
MULTIFIELDS IMAGES .....	89
XML EXAMPLES .....	89
<b>55. MULTIROWPROCESSING .....</b>	<b>91</b>
XML EXAMPLE .....	94
<b>56. MVAAMOUNTFORMULA .....</b>	<b>95</b>
DESCRIPTION .....	95
MVAAMOUNTFORMULA ELEMENT\ATTRIBUTE TABLE .....	95
<b>57. NUVPICKMETHOD .....</b>	<b>96</b>
DESCRIPTION .....	96
NUVPICKMETHOD\ATTRIBUTE TABLE .....	96

# 1. DaysInYear

## Description

This Business Rule provides math expressions to calculate the days in a year.

## DaysInYear Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options		
<DaysInYear> </DaysInYear>	The opening and closing elements of this business rule.		
		String	Defines the number of days in year used for interest calculations.

## XML Example

```
<DaysInYear>360</DaysInYear>
```

# 2. DefaultCurrency

## Description

This Business Rule is used to default currency fields to USD (U.S.Dollars).

## DefaultCurrency Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options		
<DefaultCurrency> </DefaultCurrency>	The required opening and closing elements of this business rule.		
	NAME	String	USD (U.S. Dollars)

## XML Example

```
<DefaultCurrency NAME="USD">{B92F2127-C0EE-4527-B3BE-FF4CEBAF7830}</DefaultCurrency>
```

# 3. DefaultUnitValue

## Description

ONLY FOR BACKWARD COMPATIBILITY. Provides the default unit value for weighted unit values calculations. This functionality will be discontinued.

## DefaultUnitValue Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options		
<DefaultUnitValue>	The opening and closing elements of this business rule. Defines the default unit value for weighted unit value calculations.		
		Integer	

## XML Example

```
<DefaultUnitValue>10</DefaultUnitValue>
```



## 4. DeleteActivity

### Description

This Business Rule is used to delete an activity from the Activity Screen, when the specified condition is satisfied. More than one activity can be deleted. After an activity is deleted, it will appear shadowed. **Note:** This business rule has two syntaxes. They should be used as per the requirement.

### DeleteActivity Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options		
<DeleteActivity>	The opening and closing tag for each DeleteActivity element when more than one exists.		
<DeleteActivities>	This element is used only when there is a requirement to delete more than one activity. In such cases, each activity should be defined within its own individual <DeleteActivity> element. <b>Note:</b> When only one activity should be deleted <DeleteActivities> element should not be used. See notes in <Activities> element.		
<DeleteActivity> </DeleteActivity>	This element is used to encompass the <Tests> element that determines whether or not an activity should be deleted. If an activity should be deleted it determines which activity should be deleted by specifying it through <Activities> element, respectively.		
<Tests>	Allows configuration of Test(s) to see if the section of rule should be invoked. In this Business Rule, a condition is defined to determine whether an activity should be deleted.		
<Test>	This element is used to specify the condition. If this condition is satisfied, the specified activity will be deleted from the Policy.		
		Expression	Specify a condition.
	TYPE	Expression	Indicate the type of condition. Expression is the only literal value used for this attribute. <b>Example:</b> <TestType="Expression">SomeMathVariable=27</Test>
<Activities>	This is the opening tag for the activities that should be shadowed in the Activity Screen. <b>Note:</b> If the requirement is to delete only one activity, then that activity should be specified within this element. This should be used as the subelement of <DeleteActivity> root element and no <DeleteActivities> element should be used.		
<Activity>	This element is used to specify the SQL statement that determines the activity that should be deleted.		
		SQL	SQL statement to determine the activity that needs to be deleted.

### XML Example

```

<DeleteActivity>
  <DeleteActivities>
    <DeleteActivity>
      <Tests>
        <Test TYPE="Expression">AABExists &gt; 0</Test>
      </Tests>
      <Activities>
        <Activity>SELECT AsActivity.ActivityGUID, AsActivity.StatusCode, AsActivity.ClientNumber
FROM AsActivity JOIN

```

```

AsTransaction ON AsTransaction.TransactionGUID = AsActivity.TransactionGUID AND
AsTransaction.TransactionName
IN ('AddPayAAB', 'AABChange') WHERE AsActivity.PolicyGUID = '[PolicyGUID]' AND
AsActivity.StatusCode IN ('02', '09')
AND AsActivity.TypeCode IN ('01', '04') AND AsActivity.EffectiveDate >
TO_DATE('ThreeBankingDaysCheck',
'MM/DD/YYYY')</Activity>
</Activities>
</DeleteActivity>
</DeleteActivity>
<Tests>
<Test TYPE="Expression">1 = 1</Test>
</Tests>
<Activities>
<Activity>SELECT AsActivity.ActivityGUID, AsActivity.StatusCode, AsActivity.ClientNumber
FROM AsActivity JOIN
AsTransaction ON AsTransaction.TransactionGUID = AsActivity.TransactionGUID AND
AsTransaction.TransactionName
IN ('AnnuitizationStart', 'QuarterlyProcessing', 'ARBTransfer', 'ARBChange', 'DCATransfer',
'DCACHange',
'SystematicWithdrawal', 'SystematicWithdrawalChange', 'Maturity', 'FiveYearTermination',
'AnniversaryProcessing')
WHERE AsActivity.PolicyGUID = '[PolicyGUID]' AND AsActivity.StatusCode IN ('02', '09')
AND AsActivity.EffectiveDate
>= TO_DATE('Activity:EffectiveDate', 'MM/DD/YYYY') AND AsActivity.PolicyGUID =
'[PolicyGUID]'</Activity>
</Activities>
</DeleteActivity>
</DeleteActivities>
</DeleteActivity>

```

## 5. DeleteRoles

### Description

This Business Rule allows an Activity to delete one or more Roles within the policy.

#### DeleteRoles Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options
<DeleteRoles> </DeleteRoles>	The required opening and closing elements of the DeleteRoles Rules business rule.
<Role>	IDENTIFIER   Valid role code/roleGUID/roleGUID array list.

## 6. DeliveryRequirements

### Description

Delivery Requirements Business Rule defines the four fields that require dates to be entered in order for requirements to be met. The rule is overridden at the transaction level and needs to be in the TransactionBusinessRulePacket of the transaction.

#### DeliveryRequirements Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options
<DeliveryRequirements> </DeliveryRequirements>	Indicates the opening for elements to define the validation parameters for generating and delivering requirements. Required.

<RequiredDates>	Indicates the opening tag for defining the required dates in delivery with the specified effective date or system date in default.		
	TYPE	AND	Defines fields that must have dates posted in order to pass requirement.
		OR	Defines at least one field that must have date posted in order to pass requirement.
<RequiredDate>	Identifies the individual fields that are required in order for the requirement to be met.		
		Fixed Fields	Must be one of the following values within attributes: RequestedDate DueDate ReceivedDate WaivedDate

## DeliveryRequirements Images

Business Rule

Rule: DeliveryRequirements  
Plan Group: (All Plan Groups)  
Plan: (All Plans)  
Type Code: (All Types)

Global/Override(s)

Company	Plan	Fund	Transaction	State	>>
			FlatExtraChange		

Page 2 of 2
Page 1 2
Maximum Results: 20

(Global)					
Acme Life	UL(06/24/2002)		DisabilityChangeRequest		
Acme Life	UL(06/24/2002)		FlatExtraChangeProcess		
Acme Life	ACME Term(01/01/2002)		FlatExtraChange		
Acme Life	Variable Annuity		GenerateRequirements		
Acme Life	ACME Indexed Universal Life				
Acme Life	UL(06/24/2002)				

Rule Detail

Rule Name: DeliveryRequirements Rule Type: System Version: 1  
Long Name: Delivery Requirements  
Keywords: Delivery Requirements Comments:  
Error Message:  
XML Data:

```

<DeliveryRequirements>
  <RequiredDates TYPE="AND">
    <RequiredDate>RequestedDate</RequiredDate>
    <RequiredDate>DueDate</RequiredDate>
  </RequiredDates>
  <RequiredDates TYPE="OR">
    <RequiredDate>ReceivedDate</RequiredDate>
    <RequiredDate>WaivedDate</RequiredDate>
  </RequiredDates>
</DeliveryRequirements>

```

Rule(s)

Rule: TransactionBusinessRulePacket

Rule Name: TransactionBusinessRulePack Rule Type: System Version: 7

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>CopyToSegmentFields</Rule>
  <Rule>CopyToPolicyFields</Rule>
  <Rule>DeliveryRequirements</Rule>
  <Rule>GeneratePendingRequirements</Rule>
</TransactionBusinessRulePacket>
```

Attach Download Check Out Delete Close

## Database Tables for DeliveryRequirements

Table Name	Description
AsLinkRequirement	Stores a requirements list available for the Delivery Requirements screen and includes a specified LinkValue
AsLookupRequirement	Stores criteria for generating a requirement in the RateDescription (MathVariable VALUE) and Result.
AsRequirement	Populated by the requirement data results.

## XML Example

```
<DeliveryRequirements>
  <RequiredDates TYPE="AND">
    <RequiredDate>RequestedDate</RequiredDate>
    <RequiredDate>DueDate</RequiredDate>
  </RequiredDates>
  <RequiredDates TYPE="OR">
    <RequiredDate>ReceivedDate</RequiredDate>
    <RequiredDate>WaivedDate</RequiredDate>
  </RequiredDates>
</DeliveryRequirements>
```

## 7. DisbursementApproval Screen

### Description

This business rule allows for the configuration of dynamic fields on this screen. These fields will be used to search for specific disbursements. You can use this business rule to total the currency for the columns on the Disbursement Approval Screen.

### DisbursementApprovalScreen Element\Attribute Table

Element\Tag	Attribute\Definition\Value\DataType		
<DisbursementApprovalScreen> </DisbursementApprovalScreen>	The required opening and closing elements of this business rule.		
<Tables>	Controls the formatting of the display. This attribute is used when a different code table is used for the approval selections. If Attribute is not present AsCodeDisbursementApproval is used (which is the standard). The J2EE system allows the Table tag to be used without the parent Tables tag in situations where only one table is being used.		
	NAME	Positive	Causes the AsCodeDisbursement ApprovalPositive codes to be used.
		Negative	Causes the AsCodeDisbursement ApprovalNegative codes to be used.
<Table>	The element that defines the screen as a table format. It controls the display of results and formats the results in a table.		
<Column>	Defines the format of the columns in the table		
	WIDTH		Numeric. Defines the width of the column
	ALIGN		String. Defines the positioning of the information in the column
	TOTAL		Only used when <DataType> is Money.
	FORMAT		String. Data type in the column
	EDITABLE		Integer
<Fields>	Allows for the configuration of dynamic Search Fields.		
<Validation>	Allows for the configuration of edits and validations.		

## DisbursementApprovalScreen Images

Disbursement Approval

Threshold Limit: 200000.0
Find

Page 1 of 2
Page 1 2
Maximum Results: 10

Payee Name	Policy Number	Amount	TransactionName	Processor	Approve	Disapprove	Disapprove Reason	
Smith	UL96009143	575.0	Disbursement	sueg	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Andrews	UL96009016	1500.0	TestTransaction	timmm	<input type="checkbox"/>	<input type="checkbox"/>		
Agent	UL96008414	200000.0	TestTransaction	MATTM	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Agent	UL96008819	500.0	Disbursement	stevem	<input type="checkbox"/>	<input type="checkbox"/>		
Agent	UL05009141	100.0	TestTransaction	stevem	<input type="checkbox"/>	<input type="checkbox"/>		
Agent	UL96008414	1000.0	TestTransaction	MATTM	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Agent	UL96008707	8500.0	TestTransaction	MATTM	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Ale	UL96008612	500.0	TestBonus	timmm	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Smith	UL96009144	3000.0	Disbursement	sueg	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Agent	UL96009202	100.0	TestTransaction	stevem	<input type="checkbox"/>	<input type="checkbox"/>		

Save
Close

Disbursement Approval

Threshold Limit: 200000.0
Find

Page 1 of 2
Page 1 2
Maximum Results: 10

Payee Name	Policy Number	Amount	TransactionName	Processor	Approve	Disapprove	Disapprove Reason	
Smith	UL96009143	575.0	Disbursement	sueg	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Andrews	UL96009016	1500.0	TestTransaction	timmm	<input type="checkbox"/>	<input type="checkbox"/>		
Agent	UL96008414	200000.0	TestTransaction	MATTM	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Agent	UL96008819	500.0	Disbursement	stevem	<input type="checkbox"/>	<input type="checkbox"/>		
Agent	UL05009141	100.0	TestTransaction	stevem	<input type="checkbox"/>	<input type="checkbox"/>		
Agent	UL96008414	1000.0	TestTransaction	MATTM	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Agent	UL96008707	8500.0	TestTransaction	MATTM	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Ale	UL96008612	500.0	TestBonus	timmm	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Smith	UL96009144	3000.0	Disbursement	sueg	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Agent	UL96009202	100.0	TestTransaction	stevem	<input type="checkbox"/>	<input type="checkbox"/>		

Save
Close

## Database Tables for DisbursementApprovalScreen

Table Name	Description
AsCode	Stores a list of all OIPA codes and their related descriptions
AsDisbursement	Holds data containing disbursement to clients
AsTransaction	Contains transaction details and XML that drives the transaction
AsPlan	Names and starting dates of plans
AsClientGroupField	Stores the data that is populated from the defined group fields on the policy.

## XML Examples

```

<DisbursementApprovalScreen>
  <Table>
    <Column WIDTH="70" ALIGN="LEFT" FORMAT="Text">

```

```

        <Display>Payee Name</Display>
        <Group>Client</Group>
        <Name>lastName</Name>
    </Column>
    <Column WIDTH="70" ALIGN="LEFT" FORMAT="Text">
        <Display>Policy Number</Display>
        <Group>Policy</Group>
        <Name>policyNumber</Name>
    </Column>
    <Column WIDTH="70" ALIGN="LEFT" FORMAT="Currency">
        <Display>Amount</Display>
        <Group>Disbursement</Group>
        <Name>disbursementAmount</Name>
    </Column>
    <Column WIDTH="70" ALIGN="LEFT" FORMAT="Text">
        <Display>TransactionName</Display>
        <Group>Transaction</Group>
        <Name>transactionName</Name>
    </Column>
    <Column WIDTH="70" ALIGN="LEFT" FORMAT="Text">
        <Display>Processor</Display>
        <Group>Activity</Group>
        <Name>clientNumber</Name>
    </Column>
</Table>
<ThresholdFilter DISPLAY="Yes"></ThresholdFilter>
</DisbursementApprovalScreen>

```

**or**

```

<DisbursementApprovalScreen>
    <Fields>
        <Field>
            <Name>StatusCode</Name>
            <Display>Approval Code</Display>
            <Group>DisbursementApproval</Group>
            <DataType>Combo</DataType>
            <Query TYPE="SQL">SELECT " , " FROM SYSIBM.SYSDUMMY1
        </Field>
    </Fields>
    <Tables>
        <Table NAME="Positive">
            <Column WIDTH="100" ALIGN="LEFT" FORMAT="Text">
                <Display>Payee Name</Display>
                <Group>Client</Group>
                <Name>LastName</Name>
            </Column>
        </Table>
        <Table NAME="Negative">
            <Column WIDTH="100" ALIGN="LEFT" FORMAT="Text">
                <Display>Payee Name</Display>
                <Group>Client</Group>
                <Name>LastName</Name>
            </Column>
        </Table>
    </Tables>
    <Actions>
        <Action TYPE="Suspense">
            <Fields FROMTYPE="Disbursement">
                <Field>
                    <From>DisbursementGUID</From>
                    <To>DisbursementGUID</To>
                    <DataType>String</DataType>
                </Field>
            </Fields>
        </Action>
    </Actions>
</DisbursementApprovalScreen>

```

This rule is used to configure the Disbursement Number format and sequence.

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<DisbursementNumber>	The opening and closing tag of the DisbursementNumber Business Rule.		
<Parts>	The start of the <Part> section.		
<Part>	Indicates each part of the Disbursement number and how it is formatted.	<p><b>TYPE</b></p>        <p><b>FORMAT</b></p>	<p>Indicates the value of the field type to build and format a Policy Number.</p> <p><b>VALUE</b> - Defines that a set value and what the value will be in the policynumber.</p> <p><b>SYSTEMDATE</b> - Indicates that a portion of the current date will be used in the creation of the policynumber. Used in conjunction with the FORMAT attribute.</p> <p><b>FIELD</b> - Defines that a value from a field will be used in the policynumber.</p> <p><b>SEQUENCE</b> - AsSequence Name, the value of the table is inserted according to number of digits specified in the FORMAT attribute.</p> <p><b>EXISTING</b> - The system will use the existing disbursement number. Typically defined in a mathvariable is the disbursementguid.</p>



			<p>Indicates the formatting to be performed on the type attributes.</p> <p><b>MM</b> - Used to indicate that the current month number should be used.</p> <p><b>YY</b> - Used to indicate that the last two digits of the current year should be used.</p> <p><b>DD_</b> - Used to indicate that the current day number should be used.</p> <p><b>'0xxxxx'</b> Used to indicate the number of places that the sequence number should be generated to.</p>
--	--	--	---

## 9. DisbursementRule

### Description

ONLY FOR BACKWARD COMPATIBILITY. This Business Rule is used to update disbursement records to active when a disbursement extract is generated. The rule also provides information for disbursement accounting.

### DisbursementRule Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<DisbursementRule>	The opening and closing tag of the DisbursementRule Business Rule.		
<Activity>	Points to the column which stores the result of the SQL.	INDEX	
<DisbursementAccounting>	Element indicating the opening of the disbursement accounting process.		

<b>&lt;UpdateStatus&gt;</b>	Each Code is listed in a separate PolicyStatus tag.		<b>Code</b> (as defined in AsCode StatusCode).
<b>&lt;COATransaction&gt;</b>	Inserts the transaction record into AsAccountingDetail.		<b>String</b>
<b>&lt;Direction&gt;</b>	Defines the course of the record.	<b>FORWARD</b> <b>REVERSE</b>	Indicates if the transaction is submitted to Accounting.

## XML Example

```

<DisbursementRule>
  <Activity INDEX= "1"/Activity>
  <DisbursementAccounting>
    <UpdateStatus>01</UpdateStatus>
    <COATransaction>DisbursementAcctTrans</COATransaction>
    <Direction>Forward</Direction>
  </DisbursementAccounting>
</DisbursementRule>

```

## 10. DisbursementScreen

### Description

DisbursementScreen Business Rule is used to configure the display of Fixed and dynamic fields in the DisbursementScreen. DisbursementScreen and DisbursementSearchScreen Business Rules together constitutes the DisbursementScreen (i.e. Configuration for Disbursement details section is done in DisbursementScreen Business Rule whereas the configuration for Disbursement Search section is done in the DisbursementSearchScreen Business Rules). Invoking the Disbursement record (created by processing the Disbursement transaction), populates the dynamic and fixed fields in the Disbursement details section with the respective values.

### DisbursementScreen Element \ Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<DisbursementScreen>	The Opening and Closing tag of the rule.		
<FixedFields>	<p>The &lt;FixedFields&gt; tag is used to specify the configuration of the static fields like DisbursementNumber, TypeCode, NetAmount etc in the Disbursement details section.</p> <p><b>Note:</b> Clicking the Disbursement record(created by processing the Disbursement transaction), populates the fixed fields in the Disbursement details section of the DisbursementScreen with the respective values.</p>		
<Fields>	<p>Theses fields are fields that the Client can choose to add to the DisbursementScreen.</p> <p><b>Note:</b> DisbursementScreen doesn't have a SAVE button like PolicyScreen or ClientScreen, hence dynamic fields cannot be saved in the database directly. The values to the dynamic fields are to be sent through the &lt;DisbursementField&gt; section in the Transaction. Processing the</p>		

	Transaction will in turn save the data in the AsDisbursementField table.		
<Field>	Sub Tabs that can be entered Name, Display, DataType, Query, Calculated, Options, Multifields.		

## DisbursementScreen Images

The screenshot displays the DisbursementScreen application. The top section contains search criteria: Company (Acme Life), Plan (All Plans), Start Date (01/01/2005), and End Date (12/01/2006), with a Refresh button. Below this is a table of disbursement results. The table has columns for Number, Policy, Transaction, Status, Date, and Amount. Two rows are shown, both with a status of 'Pending Shadow'. Below the table is a detailed view of a disbursement transaction for Number 1022806/06/2006DIS. This view includes fields for Disbursement Number, Policy, Status, Amount, Net Amount, Name, Address, Disbursed Date, Transaction, Type, Taxable Amount, Role, Tax ID, Status, Deposit Date, FieldTest2, FieldTest4, Processed Date, FieldTest1, and FieldTest3. A Close button is at the bottom.

Number	Policy	Transaction	Status	Date	Amount
1022806/06/2006DIS	UL96008707	TestTransaction	Pending Shadow	03/15/2005	(\$852.00)
1022901/01/2000DIS	UL96009148	TestTransaction	Pending Shadow	05/05/2005	(\$500.00)

Disbursement Number: 1022806/06/2006DIS  
 Policy: UL96008707  
 Status: Pending Shadow  
 Amount: (\$852.00)  
 Net Amount:  
 Name: Agent, Tom  
 Address:  
 Status: Active  
 Deposit Date:  
 FieldTest2:  
 FieldTest4:

Disbursed Date: 03/15/2005  
 Transaction: TestTransaction  
 Type: Check  
 Taxable Amount: (\$852.00)  
 Role: Owner  
 Tax ID:  
 Processed Date:  
 FieldTest1:  
 FieldTest3:

## Database Tables for DisbursementScreen

Table Name	Description
AsAddress	Stores Client address information
AsClient	Stores personal information about Clients
AsCode	Contains a listing and description of all valid codes and their values
AsDisbursement	Stores information over all disbursement transactions

## XML Example

```

<DisbursementScreen>
  <Fields>
    <Field>
      <Name>Status</Name>
      <DataType>Combo</DataType>
      <Display>Status</Display>
      <Query TYPE="SQL">SELECT AsCode.CodeValue, AsCode.ShortDescription FROM
AsCode

```

```

WHERE AsCode.CodeName = 'AsCodeDisbursementStatus'</Query>
</Field>
<Field>
  <Name>FieldTest2</Name>
  <DataType>Text</DataType>
  <Display>FieldTest2</Display>
</Field>
<Field>
  <Name>FieldTest3</Name>
  <DataType>Integer</DataType>
  <Display>FieldTest3</Display>
</Field>
</Fields>
</DisbursementScreen>

```

## 11. DisbursementSearchScreen

### Description

This Business Rule is used to configure the dynamic fields in the DisbursementSearchScreen to allow the Users to search the disbursement records that matches the specified criteria. If the DisbursementSearchScreen Business Rule is not used the Above the line Fields (FixedFields) will be displayed by default and used to search by. For example "Company" "Plan", "Start Date" and "End Date" will be displayed.

**Note:** DisbursementScreen and DisbursementSearchScreen Business Rules together constitutes the DisbursementScreen (i.e., configuration for Disbursement Search section is done in the DisbursementSearchScreen Business Rules whereas the Configuration for Disbursement details section is done in DisbursementScreen Business Rule).

### DisbursementSearchScreen Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<DisbursementSearchScreen>	<b>Required Root Element;</b> This tag indicates the opening and closing of the DisbursementSearchScreen Business Rule.		
<Fields>	<b>Required Element;</b> This element is used to configure the search fields in the DisbursementSearchScreen. The Search fields can be both fixed and dynamic.  <b>Note:</b> Unlike other Business Rules,		

	fixed fields are defined within the <Fields> tag in the same way as dynamic fields are defined. i.e.. <FixedFields> tags are not used to define the Fixed Fields. Instead, <Group> tag is used to indicate the table in which the value of the fields are stored, which in turn identifies whether the search field is a Fixed Field or a Dynamic Field.		
<Field>	<b>Required / Repeatable element;</b> Opening and Closing tag to configure the specific fixed or dynamic fields		
<Name>	<b>Required Element;</b> Exact Name of the Field.		
<Display>	<b>Optional Element;</b> Display Name of the Field, indicates how the field should be displayed on the screen.		
<Group>	<b>Required Element;</b> This tag identifies the table where the specified Field is stored.  <b>Note:</b> The name of the table should be mentioned without the prefix As. For e.g.: for the Fixed field, DisbursementNumber, <Group> tag is defined as below. <Group>Disbursement</Group> >		
<Disabled>	<b>Optional Element;</b> Indicates if the Field should be visible but no entry is allowed.		
<Hidden>	<b>Optional Element;</b> Indicates if Fixed Field should be hidden.		

## DisbursementSearchScreen Image

## DisbursementSearchScreen Database Tables

Table Name	Description
AsAddress	Stores Client address information
AsClient	Stores personal information about Clients
AsCode	Contains a listing and description of all valid codes and their values
AsDisbursement	Stores information over all disbursement transactions

## XML Example

```

<DisbursementSearchScreen>
  <Fields>
    <Field>
      <Name>StatusCode</Name>
      <Display>Approval Code</Display>
      <Group>DisbursementApproval</Group>
      <DataType>Combo</DataType>
      <Query TYPE="SQL">SELEct.... </Query>
    </Field>
    <Field>
      <Name>DisbursementDisapprovalCode</Name>
      <Display>Disapproval Code</Display>
      <Group>DisbursementApproval</Group>
      <DataType>Combo</DataType>
      <Query TYPE="SQL">SELEct .....</Query>
    </Field>
    <Field>
      <Name>DisbursementNumber</Name>
      <Display>Disbursement Number</Display>
      <Group>Disbursement</Group>
      <DataType>Text</DataType>
    </Field>
    <Field>
      <Name>DisbursementTypeCode</Name>
      <Display>Type Code</Display>
      <Group>Disbursement</Group>
      <DataType>Combo</DataType>
      <Query TYPE="SQL">SELEct... </Query>
    </Field>
    <Field>
      <Name>PolicyNumber</Name>

```

```

        <Display>Policy Number</Display>
        <Group>Policy</Group>
        <DataType>Text</DataType>
    </Field>
    <Field>
        <Name>OriginatingTransaction</Name>
        <Display>Transaction Name</Display>
        <Group>ActivityField</Group>
        <DataType>Combo</DataType>
        <Query TYPE="SQL">SELECT ...</Query>
    </Field>
</Fields>

```

## 12. DoABLTransfer

### Description

This Business Rule aids in transferring funds to Annual Benefit Leveling, using the ABLFundType and ABLTransfer amount. This transfer to ABL happens once a year so that the benefits are distributed in level payments to the payees.

#### Note:

- ABL is performed at the Segment Level.
- This BR is used with Transactions like ABLTransfer which is usually spawned by Anniversary
- If decided to go for ABL for a Segment, usually its applied to the entire segment. But it is possible to apply ABL only to selected funds.

#### Annual Benefit Leveling:

If a Customer is not comfortable with fluctuating monthly payments, but still wants the variable investment opportunities, he can elect the Annual Benefit Leveling (ABL) feature. If ABL is selected, he can receive payments of equal value for the period of one year. At the end of each year, his payments are recalculated based on the actual performance of his investment portfolio, and the payment amount is adjusted for the following year.



**DoABLTransfer Element\Attribute Table**

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<DoABLTransfer>	The opening and closing tag of the DoABLTransfer Business Rule.		
<ABLFundType>	<b>Required element.</b>  <b>Note:</b> If decided to go for ABL, the entire investment is moved from Variable/Fixed funds to ABLFund.		<b>Required element value;</b> <b>Code</b> CodeValue of the ABLFundType from AsCodeFundType
<ABLFundGUID>	<b>Optional element;</b> FUNDGUID of ABLFundType for the specific Plan  <b>Note:</b> <ul style="list-style-type: none"><li>• There is only one ABLFund for each Plan.</li><li>• Even if ABL is applied to more than one Segment for a Policy, the investment is applied to the same single ABLFund of that Plan to which the Policy belongs</li></ul>		<b>Required element value;</b> <b>String</b> FUNDGUID of ABLFundType for the specific Plan
<ABLTransfer>	<b>Required element;</b> Used to indicate the total payment (for a year) that needs to be transferred		
<Field>	<b>Required element;</b>		<b>Required element value;</b> <b>String</b> MathVariable that contains the total payment that needs to be transferred
<ABLPayment>	<b>Optional element;</b> Used to indicate the modal payment  <b>Note:</b> Not really required. Just the tag needs to be present. Ideally it should be either ABLTransfer or ABLPayment		

<b>&lt;Field&gt;</b>	<b>Required element;</b>		<b>Required element value; String</b> MathVariable that contains the Modal Payment
<b>&lt;AllocationMethod&gt;</b>	<b>Optional element;</b> This element is used to create records in AsAllocation table. Supports Percentage as well as Amount of CashValue to be applied for ABL  <b>Note:</b> If this tag is not present, it defaults to Percent. But Amount is preferred as it makes the final transfer amount to be equal to the original ABLTransfer amount. Using Percentage could result in the final amount to be off by few cents.		<b>Required element value; String</b> To indicate whether the Amount or Percent should be applied to ABL

## XML Example

```

<DoABLTransfer>
  <ABLFundType>02</ABLFundType>
  <AllocationMethod>Amount</AllocationMethod>
  <ABLFundGUID>ABLFundGUID</ABLFundGUID>
  <ABLTransfer>
    <Field>ABLTransfer</Field>
  </ABLTransfer>
  <ABLPayment>
    <Field>ABLPayment</Field>
  </ABLPayment>
</DoABLTransfer>

```

## 13. DoAnnuityRecalculation

### Description

This Business Rule allows an Activity to recalculate an annuity segment. In addition, if needed, it allows the creation of Benefit Split records based on Future Allocation rather than on current investment.



			<p><b>Optional attribute; ="Code"</b> Value from AsCodeAllocationType for which the segment should be recalculated</p> <p><b>Note:</b> Applicable only when USEALLOCATION is set to "Yes" BenefitSplit units are allocated to the funds selected in the specified allocation typecode rather than the default allocation <b>Policy</b> - use the Policy level allocations for the specified TypeCode. <b>Plan</b> - use the Plan level allocations for the specified TypeCode.</p> <p><b>Optional attribute;; ="Policy / Plan"</b> <b>Policy</b> - use the Policy level allocations for the specified TypeCode <b>Plan</b> - use the Plan level allocations for the specified TypeCode</p> <p><b>Note:</b> This attribute is applicable only when TYPECODE is present</p>
<FixedFundPerce nt>	<p><b>Required element;</b> To indicate the percentage of Premium allocated to the Fixed fund</p>		<p><b>Required element value; String Integer</b> A MathVariable with the percentage of Premium allocated to the Fixed fund</p>
<CalculateRate>	<p><b>Required element;</b> To specify the Name of the CalculateGeneral</p>		<p><b>Required element value; Name of the Calculate rule</b> Name of the CalculateGeneral rule</p>

	rule that has to be executed in order to recalculate the Segments upon processing the Transaction.		
<b>&lt;WriteActivitySource&gt;</b>	<b>Optional element;</b> Indicates if the source activity is to be stored to the BenefitSplit record.		<b>Required element value; Yes / No</b> <b>Yes</b> - Indicates that the source activity that caused the BenefitSplit is captured in the AsBenefitSplit table <b>No</b> - Indicates that the source activity that caused the BenefitSplit is not captured in the AsBenefitSplit table

### XML Example

```
<DoAnnuityRecalculation WRITESEGMENTALLOCATIONS="Yes" USEALLOCATIONS="Yes" TYPECODE="02">
  <FixedFundPercent>PercentInFixedFund</FixedFundPercent>
  <CalculateRule>CalculateGeneral</CalculateRule>
</DoAnnuityRecalculation>
```

## 14. DoBenefitSplit

### Description

The Business Rule allows an Activity to calculate the benefit amount for products with benefit splits.

**Note:** It's attached to transactions like AnnuityPayment. Needs to be calculated for every payment.

### Annual Benefit Leveling:

If a Customer is not comfortable with fluctuating monthly payments, but still wants the variable investment opportunities, he can elect the Annual Benefit Leveling (ABL) feature. If selected, he can receive payments of equal value for the period of one year. At the end of each year, his payments are recalculated based on the actual performance of his investment portfolio, and the payment amount is adjusted for the following year.

**DoBenefitSplit Element/Attribute Table**

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<DoBenefitSplit>	The opening and closing tag of the DoBenefitSplit Business Rule.		
<ABLIndicator>	<b>Required element;</b> This element is used to indicate if the benefit should be subjected to Annual Benefit Leveling or not		<b>Required element value; String</b> MathVariable that indicates if benefit is annual benefit leveling.
<ABLFundType>	<b>Optional element;</b> Defines Fund Type, as applied based on the value of the ABLIndicator.		<b>Required element value; Code</b> CodeValue of the ABLFundType from AsCodeFundType
<ABLFundGUID>	<b>Optional element;</b> This element is used to specify the ABLFund that should be used for that Policy.  <b>Note:</b>  Normally, each Plan has only one ABLFund		<b>Required element value; String</b> MathVariable equal to the ABLFundGUID for the plan.
<ABLPayment>	<b>Required element;</b> ABLPayment amount used to calculate the transaction. This will be the Check Amount and is only applicable if ABLIndicator is equal to "Yes".		<b>Required element value; String</b> MathVariable that specifies the ABL Payment amount
<Query>	<b>Required element;</b> Indicates the Query to define the controls for fund participation in the benefit.		<b>Required element value; SQL</b> Query to define the controls for fund participation in the benefit.
<CheckAmount>	<b>Required element;</b> Defined in the transaction as "0", this business rule will calculate the amount and insert the result.  <b>Note:</b>		<b>Required element value; String</b> MathVariable to specify the Amount

	This rule internally calculates the CheckAmount - the amount to be paid to the Customer and returns the result which then is used by the corresponding Transaction.		
<b>&lt;WriteActivitySource&gt;</b>	<b>Optional element;</b> Indicates the source activity is stored to the BenefitSplit record.		<b>Required element value; Yes/No</b> <b>Yes</b> - Indicates that the source activity that caused the BenefitSplit is captured in the AsBenefitSplit table. <b>No</b> - Indicates that the source activity that caused the BenefitSplit is not captured in the AsBenefitSplit table.

## XML Example

```
<DoBenefitSplit>
  <BenefitPecent>BenefitPecent</BenefitPecent>
  <StatusChange>03</StatusChange>
  <Query> SELECT AsFund.FundGUID BENEFITSPLIT_ChildFundGUID... </Query>
  <ABLIndicator>ABLIndicator</ABLIndicator>
  <ABLFundType>02</ABLFundType>
  <ABLFundGUID>{9216CD91-0C50-4BB3-85E8-E13361EC8823}</ABLFundGUID>
  <ABLPayment>ABLPayment</ABLPayment>
  <CheckAmount>CheckAmount</CheckAmount>
</DoBenefitSplit>
```

## 15. DoBenefitSplitChange

### Description

This Business Rule is used to change the Benefit Split units after annuitization. The new benefit amount is calculated by adding or subtracting the specified Fixed and Variable amounts to/from the current BenefitSplit amounts.

Used to change the original benefit split units just for one fund **FundToAdjust** which is a math variable or list of funds (no limit). If the activity is reversed that uses DoBenefitSplitChange, the benefit split units will change back to the original units.

**Note:** This rule is used to change the benefit split units after annuitization. It would be used for corrections and increasing annuities (COLA). When DoBenefitSplitChange is processed, there are two major steps in the processing. First, the existing AsBenefitSplit records for the designated funds on the payout segment are set

to a typecode of 99 (inactive). Second, a new set of AsBenefitSplit records is created reflecting the new values as defined by the rule.

**DoBenefitSplitChange Element\Attribute Table**

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<DoBenefitSplitChange>	The opening and closing tag of the DoBenefitSplitChange Business Rule.		
<BenefitChange>	<b>Required element;</b> Indicates how the benefits should be changed.	<b>BENEFITTYPE</b>  <b>CHANGETYPE</b>  <b>ADDFIXEDAMOUNT</b>  <b>ADDVARIABLEAMOUNT</b>	<b>Required attribute; = "String"</b> Generally the value, "ActiveSegment" is used for this attribute.  <b>Required attribute; = "Percent / AdditionalAmount"</b> To specify the kind of change that is being made to the BenefitSplit <b>Percent</b> - To indicate that the existing BenefitSplit will be increased by certain percentage <b>AdditionalAmount</b> - To indicate that the existing BenefitSplit will be increased by an additional amount.  <b>Required when CHANGETYPE="AdditionalAmount"</b> <b>= "String / Integer"</b> Indicates the amount that is to be added to the Fixed funds in the BenefitSplit.  <b>Required when CHANGETYPE="AdditionalAmount"</b> <b>= "String / Integer"</b> Indicates the amount that is to be added to the Variable funds in the BenefitSplit.
<SegmentGUID>	<b>Required element;</b> To specify the Segment for		<b>Required element value; String</b> Segment to which this Benefit



	<p>which Benefit split should occur</p> <p><b>Note:</b></p> <p>If there are more than one Segment, the Transaction has to be processed for each segment.</p>		Change should be applied.
<b>&lt;PercentageChange&gt;</b>	<p><b>Required element;</b> The percentage to which the BenefitSplit needs to be changed.</p>		<p><b>Required element value;</b> <b>String</b> MathVariable that indicates the percentage of changes</p>
<b>&lt;Query&gt;</b>	<p><b>Required element</b></p>	<b>ACTION</b>	<p><b>Required element value;</b> <b>SQL</b> SQL string that is to be executed to obtain the required information.</p> <p><b>Optional attribute;</b> <b>= "Limit"</b> Indicates that the BenefitChange is applied to all the funds other than the one returned by this Query.</p>
<b>&lt;WriteActivitySource&gt;</b>	<p><b>Optional element;</b> Indicates the source activity is stored to the BenefitSplit record.</p>		<p><b>Required element value;</b> <b>Yes/No</b> <b>Yes</b> - Indicates that the source activity that caused the BenefitSplit is captured in the AsBenefitSplit table. <b>No</b> - Indicates that the source activity that caused the BenefitSplit is not captured in the AsBenefitSplit table.</p>

## XML Example

```

<DoBenefitSplitChange>
  <BenefitChange BENEFITTYPE="ActiveSegment" CHANGETYPE="AdditionalAmount"
  ADDVARIABLEAMOUNT="VariableBenefitAmount"
  ADDFIXEDAMOUNT="FixedBenefitAmount">
    <SegmentGUID>SegmentGUID</SegmentGUID>
    <PercentageChange>NewBenefitSplitPercent</PercentageChange>
    <Query ACTION="Limit">SELECT AsBenefitSplit.FundGUID FROM AsBenefitSplit WHERE RelatedGUID =
'SegmentGUID' AND TypeCode
='05'</Query>
  </BenefitChange>
</DoBenefitSplitChange>

```

## 16. DocumentCosmetics

### Description

This rule instructs the system to use a specific format when the document is viewed. Documents are generated in several formats by the system.

### DocumentCosmetics Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options		
<DocumentCosmetics> <DocumentCosmetics>	The opening and closing elements of this business rule. Required.		
<DefaultDisplay>		String	Acrobat, Excel

### XML Example

```
<DocumentCosmetics>
  <DefaultDisplay>Acrobat</DefaultDisplay>
  <DefaultDisplay>Excel</DefaultDisplay>
</DocumentCosmetics>
```

## 17. DoSegmentRecalculation

### Description

This Business Rule can be attached to a transaction that specifies the names and execution orders of segments attached to a policy. When the rule is processed, the segments for the current policy will be loaded and calculated in the order specified.

### DoSegmentRecalculation Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<DoSegmentRecalculations>	The opening and closing tag of the DoSegmentRecalculation Business Rule.		
<SegementFilter>	<b>Optional element;</b> Allows Transactions to calculate specific segments rather than all of the Policy's segments. This tag if present, is evaluated before any other tags.	<b>IF</b>	<b>Optional attribute; = "Expression"</b>  If this attribute is present and if the condition returns True, only those Segments that are specified in the <SegmentGUID> tag are processed. All other Segments are ignored.

			If this attribute is present but the condition returns False, then the IF condition in <CalculationOrder> is evaluated.
<SegmentGUID>	<b>Required / Repeatable element;</b> This element is used to determine that needs to be processed		<b>Required element value;</b> <b>String</b> MathVariable that provides the SegmentGUID for which recalculation should be performed. This value is obtained from the Transaction from which this BR is attached to.
<CalculationOrder>	<b>Required element;</b> Used to specify the order in which the Segments have to be recalculated. This tag is processed when the IF condition in <SegmentFilter> evaluates to <b>False</b> or when the <SegmentFilter> is absent. <b>Note:</b> Only those segments that are mentioned here will get recalculated. If a segment is part of a policy but not mentioned here it will not get processed.	IF	<b>Optional attribute;</b> <b>= "Expression"</b>  If this attribute is present, the condition specified is evaluated first and if it returns True or if this attribute is absent , then only those Segments that are specified in the <SegmentName> tag are processed in that order. All other Segments are ignored If this attribute is present but the condition returns False, then all the Segments in the Policy will be calculated
<SegmentName>	<b>Required / Repeatable element;</b> This element is used to specify the name of the Segments. The order in which the Segments should be processed depends on the order in which they are		<b>Required element value;</b> <b>String</b> Name of the Segment.

	mentioned in this element		
<b>&lt;WriteActivitySource&gt;</b>	<p><b>Optional element;</b> Indicates the source activity is stored to the BenefitSplit record.</p> <p><b>Note:</b> <b>ActivityGUID in AsBenefitSplit table:</b> If the BenefitSplit is created by normal activity processing, then the Activity's GUID should be put in the ActivityGUID column.</p> <p><b>ShadowActivityGUID in AsBenefitSplit table:</b> If the existing BenefitSplit records are affected by any of the activities, then that Activity's GUID should be put in ShadowActivityGUID</p>		<p><b>Required element value;</b> <b>Yes/No</b> <b>Yes</b> - Indicates that the source activity that caused the BenefitSplit is captured in the AsBenefitSplit table. <b>No</b> - Indicates that the source activity that caused the BenefitSplit is not captured in the AsBenefitSplit table.</p>

## XML Example

```

<DoSegmentRecalculations>
  <CalculationOrder>
    <SegmentName>Base Coverage - Term</SegmentName>
    <SegmentName>Flat Extra - Temporary</SegmentName>
    <SegmentName>Flat Extra - Permanent</SegmentName>
    <SegmentName>Term - Disability Benefit Option</SegmentName>
  </CalculationOrder>
  <WriteActivitySource>Yes</WriteActivitySource>
</DoSegmentRecalculations>

```

## 18. DoWithdrawalSplit

### Description

This Business Rule allows an Activity to adjust benefit splits when withdrawals happen on one or more funds. This adjustment is applicable to variable payout products.

### DoWithdrawalSplit Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<b>&lt;DoWithdrawalSplit&gt;</b>	The opening and closing tag of the DoWithdrawalSplit Business Rule.		

<b>&lt;TotalWithdrawal&gt;</b>	Indicates the Math Variable defining the withdrawal amount.		<b>String</b>
<b>&lt;SyncOriginalUnits&gt;</b>	Determines whether the original benefit split records should also be updated.		<b>Yes</b> -If set to "Yes" on original units (Type 51), and the current units (Type 05) are synchronized after withdrawal. <b>No</b> - If set to "No", no synchronization is done. I.E.- The original units are retained
<b>&lt;Query&gt;</b>	Identifies the Query to determine controls for funds participate in payout.		<b>String</b>
<b>&lt;VariableSplitDollar&gt;</b>	Output. Calculates portion of payout from variable.		<b>String</b>
<b>&lt;FixedSplitDollar&gt;</b>	Output. Calculates portion of payout from fixed funds.		<b>String</b>
<b>&lt;VariableSplitPercentage&gt;</b>	Variable Percent.		<b>String</b>
<b>&lt;FixedSplitPercentage&gt;</b>	Fixed Percent.		<b>String</b>
<b>&lt;WriteActivitySource&gt;</b>	Used to write the BenefitSplitRecord in AsBenefitSplit Table.		<b>Yes</b> - Indicates the source activity is stored to the BenefitSplit record. <b>No</b> - Indicates the change is stored to the BenefitSplit record.

## XML Example

```
<DoWithdrawalSplit>
  <TotalWithdrawal>TotalWithdrawal</TotalWithdrawal>
  <SyncOriginalUnits>No</SyncOriginalUnits>
  <Query>SELECT AsBenefitSplit.BenefitSplitGUID WITHDRAWALSPLIT_...</Query>
  <VariableSplitDollar>VariableSpiltDollar</VariableSplitDollar>
  <FixedSplitDollar>FixedSpiltDollar</FixedSplitDollar>
  <VariableSplitPercentage>VariableSplitPercentage</VariableSplitPercentage>
  <FixedSplitPercentage>FixedSplitPercentage</FixedSplitPercentage>
  <WriteActivitySource>No</WriteActivitySource>
</DoWithdrawalSplit>
```

## 19. DuplicateClient

### Description

This Business Rule controls what the system will do when a duplicate client name or tax identification number is entered.

### DuplicateClient Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<DuplicateClient>	The opening and closing tag of the DuplicateClient Business Rule.		
<Client>	The opening and closing tag of the Client Tag. Defines the valid Client Type.	<b>RESTRICTION</b>  <b>TYPE</b>	Specifies the level of error. <b>Required</b> <b>Warning-</b> Allows client to still be added and saved with duplicate information. <b>Denied-</b> Does not allow client to be added and saved with duplicate information.  <b>Code</b> (as defined in AsCodeClientTypeCode) comma separated list. <i>Optional</i>
<Message>	Gives ability to customize message when a duplicate client is created. <i>Optional</i>		<b>String</b>
<FixedFields>	Specifies the fixed fields which are not allowed to be duplicated.		
<Field>	Name of the Fixed Field.		
<DynamicFields>	Specifies the dynamic fields which are not allowed to be duplicated.		
<Field>	Name of the Dynamic Field.		

## XML Example

```
<DuplicateClient>
  <Client RESTRICTION="Warning" TYPE="02">
    <Message>Based on entered first, last name, ssn and sex, a matching client was found. Continue?</Message>
    <FixedFields>
      <Field>FirstName</Field>
      <Field>LastName</Field>
      <Field>Sex</Field>
      <Field>TaxId</Field>
    </FixedFields>
  </Client>
</DuplicateClient>
```

## 20. DuplicatePolicy

### Description

This Business Rule controls what the system will do when a duplicate policy number or name is entered.

### DuplicatePolicy Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Option		
<DuplicatePolicy> <DuplicatePolicy>	Required opening and closing elements of this business rule.		
<Restriction>	TYPE	Warning	
		Denied	
<PolicyNumber>		Yes	Invokes the restriction and the duplicate Policy Name is the value of the field.
		No	Restriction is not invoked and a different Policy Number may exist.
<PolicyName>		Yes	Invokes the restriction and the duplicate Policy Name is the value of the field.
		No	Restriction is not invoked and a different Policy Name may exist.

## XML Example

```
<DuplicatePolicy>
  <Restriction TYPE="Denied">
    <PolicyNumber>Yes</PolicyNumber>
    <PolicyName>Yes</PolicyName>
  </Restriction>
</DuplicatePolicy>
```

## 21. EligibleSegmentNamesByPolicyStatus

### Description

This Business Rule is used to make the Segments selectively available to Policies based on the Policy Status. If a particular Policy Status is included in the rule only the Segment Names referenced will be available for entry for that Policy Status. If a Policy Status is not included in this Business Rule then all of the Plan's Segments will be available.

### EligibleSegmentNamesByPolicyStatus Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<b>&lt;EligibleSegmentNamesByPolicyStatus&gt;</b>	The opening/closing tag of the EligibleSegmentNamesByPolicyStatus Business Rule.		
<b>&lt;PolicyStatus&gt;</b>	<b>Required, repeatable element;</b> To indicate the Policy's status for which the list of segments should be available in the policy's segment screen.	<b>CODE</b>  <b>NAME</b>	<b>Integer; Required attribute</b> Policy Status Code from AsCodeStatus.  <b>Integer; Required attribute</b> Name of the Policy Status from AsCode => AsCodeStatus table.
<b>&lt;SegmentName&gt;</b>	<b>Required, repeatable element;</b> To indicate the name of the Segment that can be added to a Policy based on the status of the Policy.		<b>Required element value;</b> <u>SegmentName</u> - Name of the Segment

### XML Example

```
<EligibleSegmentNamesByPolicyStatus>
  <PolicyStatus CODE="08" NAME="Pending">
    <SegmentName>Deferred Annuity</SegmentName>
  </PolicyStatus>
```



```

<PolicyStatus CODE="38" NAME="Ready To Annuitize">
  <SegmentName>Joint and Survivor Life Annuity</SegmentName>
  <SegmentName>Life Annuity</SegmentName>
  <SegmentName>Joint and Survivor Life Annuity with Payments Guaranteed </SegmentName>
  <SegmentName>Life Annuity with Payments Guaranteed</SegmentName>
</PolicyStatus>
</EligibleSegmentNamesByPolicyStatus>

```

## 22. EligibleTransactionsByPolicyStatus

### Description

This Business Rule lists all eligible transactions that can be added to a policy based on the policy status. The activities can be both User defined and Spawned (i.e. System defined activities). The Business Rule can be overridden at the plan level.

**EligibleTransactionsByPolicyStatus Element\Attribute Table**

Element/Tag	Definition	Attribute	Element/Attribute Value and Description	Additional Information
<b>&lt;EligibleTransactionsByPolicyStatus&gt;</b>	<b>Required;</b> The opening and closing tags of the EligibleTransactionsByPolicyStatus Business Rule.			
<b>&lt;PolicyStatus&gt;</b>	<b>Required;</b> To indicate the Policy's status for which the list of activities should be available in the Policy Activity screen.	<b>CODE</b>  <b>NAME</b>	<b>Integer;</b> <b>Required;</b> Policy Status Code from AsCodeStatus.  <b>String;</b> <b>Optional;</b> Description of the PolicyStatus Code.	
<b>&lt;Transaction&gt;</b>	<b>Required;</b> Indicates transaction name that should be available in the specified policy status.	<b>TYPE</b>	Policy Field Type. <b>String</b>  <b>User -</b> Transaction can be user entered or	

			spawned.  <b>System</b> - Transaction can only be spawned.	
<b>&lt;Tests&gt;</b>	<b>Optional Element;</b> Indicates the start and end tag of the Test elements and definition.  1) <Tests> tag are used to limit the transactions on the activity screen based on the another field in the Policy screen 2) Also used to limit activities from processing based on an activity/transaction already processing, e.g., Once a DCA start process, DCA start should no longer be available.			
<b>&lt;Test&gt;</b>	<b>Required/Repeatable Element;</b> Defines the Expression to compare a PolicyField to validate the Transaction Value. If more than one <Test> tags are used, all the Test conditions should be satisfied in order for the transactions. to be listed when the Policy is in certain Status.		<b>String.</b> Test criteria expression.	Policy: <a href="#">POLICYFIELD</a> Boolean Operator " <a href="#">VALUE</a> "
<b>&lt;Transactions&gt;</b>	Indicates start tag and end tag of Transaction controlled by test elements.	Policy: <a href="#">POLICYFIELD</a> Boolean Operator " <a href="#">VALUE</a> "	<b>String</b>	
<b>&lt;Transaction&gt;</b>	Indicates the transaction name that	<b>TYPE</b>	<b>String</b> <b>User -</b>	

	will be available in the specified policy status if all test conditions are true.		Transaction can be user-entered or spawned.  <b>System</b> - Transaction can only be spawned.	
--	---	--	---	--

### XML Example:

```

<EligibleTransactionsByPolicyStatus>
  <PolicyStatus CODE="36" NAME="Withdrawn">
    <Transaction TYPE="User">Reopen</Transaction>
    <Transaction TYPE="User">AgentNotification</Transaction>
    <Transaction TYPE="System">AgentNotification</Transaction>
    <Tests>
      <Test>Policy:SubStatusCode >>< "09"</Test>
      <Test>Policy:SubStatusCode >>< "22"</Test>
    <Transactions>
      </Transaction>
    </Tests>
  </PolicyStatus>
  <PolicyStatus CODE="08" NAME="Pending">
    <Transaction TYPE="User">UWApproved</Transaction>
    <Transaction TYPE="User">VoidStopPayRequest</Transaction>
    <Tests>
      <Test>Policy:SubStatusCode >>< "09"</Test>
      <Test>Policy:SubStatusCode >>< "22"</Test>
    <Transactions>
      <Transaction TYPE="User">Withdrawn</Transaction>
      <Transaction TYPE="User">UWApproved</Transaction>
    </Transactions>
    </Tests>
    <Tests>
      <Test>Policy:SubStatusCode >>< "10"</Test>
      <Test>Policy:SubStatusCode >>< "33"</Test>
    <Transactions>
      <Transaction TYPE="User">Withdrawn2</Transaction>
      <Transaction TYPE="User">UWApproved2</Transaction>
    </Transactions>
    </Tests>
  </PolicyStatus>
  <PolicyStatus CODE="04" NAME="Canceled">
    <Transaction TYPE="User">Reopen</Transaction>
  </PolicyStatus>
  <PolicyStatus CODE="41" NAME="Decline">
    <Transaction TYPE="User">Reopen</Transaction>
  </PolicyStatus>
  <PolicyStatus CODE="48" NAME="Postpone">
    <Transaction TYPE="User">Reopen</Transaction>
  </PolicyStatus>
</EligibleTransactionsByPolicyStatus>

```

## 23. Extensions

### Description

#### Extensions Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options
<Extensions> </Extensions>	The required opening and closing elements of the Extensions business rule.
<Extension>	NAME
<Assembly>	Assembly path
<ClassName>	Name of the class/object

## 24. ExternalProcess

### Description

#### CopyToBusinessRules Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options
<ExternalProcess> </ExternalProcess>	The required opening and closing elements of the ExternalProcess business rule.
<Process>	Name of the process
<Assembly>	Assembly path
<Object>	Name of the class/object

## 25. ExtractDetails

### Description

This Business Rule defines how an Activity will process records for the purpose of extracting the records to a flat file.

#### ExtractDetails Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<ExtractDetails>	The opening and closing tag of the ExtractDetails Business Rule.	PROCESS FILEPREFIX FILESUFFIX	<i>String</i> <i>String</i> <i>String</i> Indicates the file type.
<Header>	Defines the format of the header record.		

<b>&lt;Column&gt;</b>	Points to the column in which the information is to be stored.	<b>INDEX</b>	<i>Integer</i>
<b>&lt;Type&gt;</b>	Points to the column in which the information is to be stored.	<b>VALUE</b>	<i>String</i>
<b>&lt;Record&gt;</b>	Defines the format of the detail record.		
<b>&lt;Column&gt;</b>	Points to the column in which the information is to be stored.	<b>INDEX</b>	<i>Integer</i>
<b>&lt;Type&gt;</b>	Points to the column in which the information is to be stored.	<b>VALUE</b>	<i>String</i>
<b>&lt;Trailer&gt;</b>	Defines the format of the detail record.		
<b>&lt;Column&gt;</b>	Points to the column in which the information is to be stored.	<b>INDEX</b>	<i>Integer</i>
<b>&lt;Type&gt;</b>	Points to the column in which the information is to be stored.	<b>VALUE</b>	<i>String</i>

## XML Example

```
<ExtractDetails PROCESS="Acme International" FILEPREFIX="Rule" FILESUFFIX="xml">
  <Header>
    <Column INDEX="0">
      <Type VALUE="&lt;Rule&gt;">Value</Type>
    </Column>
  </Header>
  <Record>
    <Column INDEX="0">
      <Type INDEX="0">Data</Type>
    </Column>
  </Record>
  <Trailer>
    <Column INDEX="0">
      <Type VALUE="&lt;/Rule&gt;">Value</Type>
    </Column>
  </Trailer>
</ExtractDetails>
```

## 26. FieldsAreEqual

### Description

This Business Rule allows an Activity to compare two or more fields. Comparison type is '='.

### FieldsAreEqual Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<FieldsAreEqual>	The opening and closing tag of the FieldsAreEqual Business Rule.		
<Fields>	Allows configuration of dynamic fields.		

### XML Example

```
<FieldsAreEqual>
  <Fields TYPE="Numeric" MESSAGE="Payment must equal total cost">
    <Field>TotalSegmentCost</Field>
    <Field>GrossAmount</Field>
  </Fields>
</FieldsAreEqual>
```

## 27. FreeAmountFormula

### Description

FreeAmountFormula is calculated along with Valuation in conjunction with MVAAmountFormula and represents the FreeAmount that is associated with the policy. The FreeAmountFormula calculates the portion of the policy's cash value that can be withdrawn or surrendered without incurring a charge, tax, or penalty- the 'free amount'. This is typically found on Annuities and is based on deposits and cash values for the policy.

**Note:** FreeAmountFormula can be a global or transaction level override based on the configuration the client requests. This business rule is invoked during valuation, in the order as specified in the ValuationCalculationOrder business rule.

### FreeAmountFormula Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<FreeAmountFormula>	The opening and closing tag of		

	the FreeAmount Business Rule.		
<b>&lt;FreeAmountCalculation&gt;</b>	<b>Required element;</b> The opening and closing element that indicates the list of inputs needed to calculate the Free Amount <b>Note:</b>  In Dot Net, it is <FreeAmountOutput> is used, instead of <FreeAmountCalculation> element		
<b>&lt;MathVariables&gt;</b>	<b>Required element;</b> Start of MathVariables section.		
<b>&lt;MathVariable&gt;</b>	<b>Required / Repeatable element;</b> To define the list of MathVariables to indicate the values needed to calculate the Free Amount.		

## XML Example

```

<FreeAmountFormula>
  <FreeAmountDefinition>
    <PolicyCashValue></PolicyCashValue>
  </FreeAmountDefinition>
  <FreeAmountCalculation>
    <Zero TYPE="VALUE">0</Zero>
    <Premium TYPE="SQL">SELECT ISNULL(SUM(AsValuation.ValuationAmount),0) ...</Premium>
    <TenPercentOfPremium ONERROR="Ignore" DEFAULT="0" ROUND="2" TYPE="EXPRESSION">Premium *
      .1</TenPercentOfPremium>
    <PrincipalRemaining ONERROR="Ignore" DEFAULT="0" TYPE="SQL">SELECT ...</PrincipalRemaining>
    <FreeTaken ONERROR="Ignore" DEFAULT="0" TYPE="SQL">SELECT..FROM AsSegment WHERE
  ..</FreeTaken>
    <Gain ONERROR="Ignore" DEFAULT="0" TYPE="EXPRESSION">PolicyCashValue - PrincipalRem</Gain>
    <TrueGain ONERROR="Ignore" DEFAULT="0" TYPE="FUNCTION">MaxOf("Zero", "Gain")</TrueGain>
    <FreeAmountCalc ONERROR="Ignore" DEFAULT="0" TYPE="EXPRESSION">(TrueGain + TenPercentOfPremium)
      - FreeTaken</FreeAmountCalc>
    <FreeAmount ONERROR="Ignore" DEFAULT="0" TYPE="FUNCTION">MaxOf ("Zero","FreeAmountCalc")
  </FreeAmount>
</FreeAmountCalculation>
</FreeAmountFormula>

```

## 28. FundFillMethod

### Description

This Business Rule is introduced to hold the method of the unit value in the entry screen to pre-fill the missing New Unit Value (NUV).

### FundFillMethod Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Option
<FundFillMethod> </FundFillMethod>	The opening and closing elements of this business rule. Required. Defines the method of populating missing NUVs Forward Backward

### XML Example

```
<FundFillMethod>Forward</FundFillMethod>
```

## 29. FundListForAllocation

### Description

This Business Rule is introduced to define controls for the fund dropdown on the Activity add/edit screen. **Note:** This BR should not be added in the TransactionBusinessRulePacket BR.

### FundListForAllocation Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<FundListForAllocation>	The opening and closing tag of the FundListForAllocation Business Rule.	FOREIGNPLANGUID	<b>Optional attribute;</b> [String contains the planGuid of the plan from which funds should be loaded for this transactional override.  <b>Note:</b> If the FOREIGNPLANGUID attribute is not set, the rule will assume that we should use the current plan to build the FundListForAllocation.
<Query>	<b>Optional element;</b> <ul style="list-style-type: none"><li>Identifies the Fund set to be used</li><li>Provides a place</li></ul>		<b>Required element value;</b> <b>SQL</b> SELECT FundGUID FROM AsFund WHERE AsFund.PlanGUID = (PlanGUID)'



	<p>to define a SQL which retrieves the funds to seed the available allocation list of the activity.</p> <ul style="list-style-type: none"> <li>Returns a list of FundGUID values of the funds to be utilized.</li> </ul>		<p><b>Note:</b> If there is a FOREIGNPLANGUID attribute (current functionality) present, this will be utilized for PlanGUID of the query. Otherwise the PlanGUID of the activity will be utilized.</p>
<FundHierarchy>	<p><b>Required element;</b> Identifies if Fund allocation list should display the Parent or Child version of the fund.</p> <p><b>Note:</b> &lt;FundHierarchy&gt; tags within the FundListFor Allocation business rule will be ignored when &lt;Query&gt; tag is used.</p>	EXCLUDETYPE	<p><b>Required element value;</b> <b>Child / Parent</b> To restrict the funds listed in the Allocation section of the Transaction <b>Child-</b> To allow only Child funds to be available for allocation <b>Parent-</b> To allow only Parent funds to be available for allocation</p> <p><b>Optional attribute;</b> <b>Code</b> To exclude funds that are a specific type of fund. The code values associated with the fund types that needs to be excluded from the fund drop down box.</p>
<FundsByState>	<p><b>Optional element;</b> Identifies the required fund approval as applies to the state.</p>		<p><b>Required element value;</b> <b>Yes / No</b> <b>Yes</b> - Database is checked to determine the Fund approval by the State <b>No</b> - Loads all Funds</p>
<Relation>	<p><b>Optional element;</b> This element is used to further restrict the funds from getting displayed in the Allocation section of the Transaction.</p>		
<BandVariable>	<p><b>Required element;</b> This element is used to specify the type of BandVariable</p>		<p><b>Required element value;</b> <b>String</b> MathVariable that represents a Field in PolicyScreen whose value determines the child/parent relationship.</p>

<b>&lt;OtherFunds&gt;</b>	<b>Optional element;</b> Indicates if funds should or should not be included in the Fund allocation list.		<b>Required element value; Yes / No</b> <b>Yes</b> - restrictions applied by FundHierarchy and Relation are ignored <b>No</b> - restrictions by FundHierarchy or Relation are applied.
---------------------------	--	--	--

## XML Example

```

FundListForAllocation>
  <Query>SELECT FundGUID FROM AsFund WHERE AsFund.PlanGUID = [PlanGUID]</Query>
  <FundHierarchy EXCLUDETYPE="06,07,08">Parent</FundHierarchy>
  <FundsByState>
    <Relation>
      <BandVariable>BandVariable</BandVariable>
    </Relation>
    <OtherFunds>Yes</OtherFunds>
</FundListForAllocation>

```

## 30. FundScreen

### Description

The FundScreen Business Rule can be configured to update Fixed Fields and to add any Dynamic Fields used for Fund processing. This business rule is generally overridden at the Plan level.

FundScreen writes to the following table:

- AsFund
- AsFundField
- AsFundStatus

### FundScreen Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description	Additional Information
<b>&lt;FundScreen&gt;</b>	The opening and closing tag of the FundScreen Business Rule.			
<b>&lt;Fields&gt;</b>	Allows configuration of dynamic fields.			
<b>&lt;FixedFields&gt;</b>	Allows configuration of 'above the line' fields.			The display name of the Fixed fields like Company,

				Plan etc can also be changed by configuring the title tag <FixedFieldTitle> tags like <CompanyTitle>, <PlanTitle> within the <FixedFields> tag.
<MultiFields>	Allows configuration of MultiFields. The Opening and closing tag of the MultiFields BR. This Statement can occur in any part of the Transaction Xml.	<b>RULE</b>	<p><b>Required element value;</b>  <b>Yes</b> - Confirms the rule statement. Enables the MultiField Business Rule (turns on).  <b>No</b> - Default and invalidates expression - no response. Disables the Multifield Business Rule (turns off).</p> <p>Required attribute;  Rule=  <u>"MultiFieldBusinessRule"</u></p> <p>For eg:  &lt;MultiFields  RULE="MultiFields -  TestWithdrawal"&gt;  Yes&lt;/MultiFields&gt;</p>	
<Validation>	Allows configuration of edits and validations.			
<OnLoad>	This element is applicable when you have OnChange processing. It contains a list of field name(s) that execute (i.e., trigger) the OnChange when the page is loaded.			
<OnChange>	The OnChange element helps with			

	processing when a field has changed and will affect the contents of another field			
<b>&lt;FundStatus&gt;</b>	Stores the status of all Funds in the system.	<b>ApplyToChildren</b>	<p><b>Required element value;</b> "MathVariable/Value" - To represent the FundStatusCode in which Fund should be set up.</p> <p>*Optional attribute * = "Yes/No" - To indicate whether the parent's status can be applied to all of its children when it is changed</p> <p>Yes-To indicate whether the parent's status can be applied to all of its children when it is changed No-parent's status can not be applied to all of its children when it is changed.</p>	
<b>&lt;AutoChildFundNameUpdate&gt;</b>	<p><b>Optional element;</b> This tag is used to indicate whether the updates to the Parent Fund Name should be automatically applied to all the associated Child Funds or not.</p> <p>Note: Disabled: *The enabling of the child fund name field will be based on the value of the &lt;Disabled&gt; tag for the field designated in the rule *When &lt;Disabled&gt; is set to 'No' and the automatic child fund updates tag value is set to 'No' or does not exist</p>		<p><b>Yes</b> - Indicates that the Child Fund Names of the given Parent Fund whose name is being updated will also be updated.</p> <p><b>No</b> - Indicates that the Child Fund Names of the given Parent Fund whose name is being updated will not update the</p>	<p>Yes:</p> <p>Format is, "Base name designated for the parent + Band information as is done with the generate child funds"</p> <p>The child fund name field will remain</p>

	<p>in the rule the child fund name field will be enabled</p> <p>*When the &lt;Disabled&gt; tag value is set to 'Yes' the child fund name field will be disabled preventing any manual updating regardless of the automatic child fund name updates tag value.</p>		Child Fund.	<p>disabled.</p> <p>No: OR the tag is omitted in its entirety then there will be no fund name updates applied against the associated children when a parent fund name is performed</p>
<FundsByState>	<p><b>Optional element;</b></p> <p>Defines whether the fund approval is by state or not.</p>		<p><b>Yes</b> - Defines the fund approval by state.</p> <p><b>No</b> - Screen operates as if this field does not exist.</p>	

## FundScreen Image

Plans

Company: 
 Plan: 
 EffectiveDate:

Fund(s)

Fund:

Page 1 of 1
 Page 1
 Maximum Results:

Effective Date	Status Code
<b>Name:</b> <input type="text" value="Acme Current Interest Credit Fund"/> <b>Type:</b> <input type="text" value="Fixed"/> <b>Removal Precedence:</b> <input type="text" value="0"/>	<b>Status:</b> <input type="text" value="Active"/> <b>Effective Date:</b> <input type="text"/> <b>Removal Method:</b> <input type="text" value="LIFO"/>

ACME Fund Code:

## Fund Screen Database Tables

Table Name	Description
AsCode	Stores a list of all OIPA codes and their related descriptions
AsFund	Contains the names of the fixed and variable funds
AsFundClass	Stores the Fund Series information
AsFundFamily	Groups funds and fund classes together
AsFundGroup	Defines relationships between funds
AsFundStatus	Stores the status of all funds in the system

## XML Example

```

<FundScreen>
  <CompanyTitle DISABLED="Yes">Company</CompanyTitle>
  <PlanTitle>Product</PlanTitle>
  <FundStatusTitle>Fund Status</FundStatusTitle>
  <AutoChildFundNameUpdate>Yes</AutoChildFundNameUpdate>
  <FundNameTitle>Fund Name</FundNameTitle>
  <FundsByState>
    <Fields>
      <Field>
        <Name>ACMECode</Name>
        <Display>ACME Fund Code</Display>
        <DataType>Text</DataType>
      </Field>
      <Field>
        <Name>IULFund</Name>
        <Display>IUL Indexed Fund?</Display>
        <DataType>Check</DataType>
        <DefaultValue>UNCHECKED</DefaultValue>
      </Field>
      <Field>
        <Name>IULIndex</Name>
        <Display>Index</Display>
        <DataType>Combo</DataType>
        <Query TYPE="FIXED">
          <Options>
            </Options>
          </Query>
      </Field>
      <Field>
        <Name>IULCalculationMethod</Name>
        <Display>Calculation Method</Display>
        <DataType>Combo</DataType>
        <Query TYPE="FIXED">
          <Options>
            </Options>
          </Query>
      </Field>
      <Field>
        <Name>IULFloorTable</Name>
        <Display>IUL Floor Table</Display>
        <DataType>Combo</DataType>
        <DefaultValue>None</DefaultValue>
        <Query TYPE="SQL">SELECT .....</Query>
      </Field>
      <Field>
        <Name>IULParticipationTable</Name>
        <Display>IUL Participation Table</Display>
        <DataType>Combo</DataType>
        <DefaultValue>None</DefaultValue>
        <Query TYPE="SQL">SELECT ....</Query>
      </Field>
    </Fields>
  </FundScreen>

```

## 31. FutureNUVEntry

### Description

This Business Rule is part of the decision process executed by the system to determine if Net Unit Values (NUV) for future dates can be entered.

### FutureNUVEntry Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<b>&lt;FutureNUVEntry&gt;</b>	The opening and closing tag of the FutureNUVEntry Business Rule.		
<b>&lt;FutureNUVAllowed&gt;</b>	Indicates if NUVs can be entered with effective dates greater than the current system date.		<b>Yes</b> <b>No</b>
<b>&lt;Message&gt;</b>	Message that will be received if FutureNUVAllowed is set to No.		<b>String</b>
<b>&lt;MaxDaysInAdvance&gt;</b>	Number of days that NUVs can be entered with an effective date after the current system date. Applicable when FutureNUVAllowed is set to Yes.		<b>Integer</b>

### XML Example

```
<FutureNUVEntry>
  <FutureNUVAllowed>Yes</FutureNUVAllowed>
  <Message>Please enter Effective Date before or equal to System Date</Message>
  <MaxDaysInAdvance>30</MaxDaysInAdvance>
</FutureNUVEntry>
```

## 32. GainLossCalculations

### Description

Gain/Loss is the gain or loss incurred by a company when a financial activity buys and/or sells variable fund units. This BusinessRule determines whether or not the system should calculate Gain/Loss for the back dated Transactions.

For example, if a Transaction was processed on a date that is couple of days after the effective date of the Transaction, the difference in price would be calculated as a gain or loss to the company.

#### Additional Information:

In OIPA, there are two columns in AsValuation table that are used to store Gain/Loss information:

- 1) ValuationGainLoss - ValuationGainLoss is populated during forward activity processing.
- 2) GainLossOnShadow - GainLossOnShadow is populated when a financial activity is reversed.

#### GenerateAddressChangeLetter Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options	
<GainLossCalculations> </GainLossCalculations>	The opening and closing elements of the GainLossCalculations business rule. Determines whether or not to calculate GainLoss.	Yes or No

## 33. GenerateAddressChangeLetter

### Description

This Business Rule generates an address change document Activity when a client address is changed.

#### GenerateAddressChangeLetter Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<GenerateAddressChangeLetter>	The opening and closing tag of the GenerateAddressChangeLetter Business Rule.		
<AddressRoles>	Start tag for the AddressRole section.		
<AddressRole>	Indicates if changes to Address Role generates Letter.	<b>TYPE</b>	<b>Code</b> (as defined in AsCode AddressRoleCode)  <b>True</b>  <b>False</b>

### XML Example

```
<GenerateAddressChangeLetter>
  <AddressRoles>
    <AddressRole TYPE="01">False</AddressRole>
    <AddressRole TYPE="02">False</AddressRole>
    <AddressRole TYPE="03">False</AddressRole>
    <AddressRole TYPE="04">False</AddressRole>
  </AddressRoles>
</GenerateAddressChangeLetter>
```



```
</AddressRoles>
</GenerateAddressChangeLetter>
```

## 34. GenerateExtractWebService

### Description

This Business Rule generates an address change document activity when a client address is changed via the internet.

### GenerateExtractWebService Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Option
<GenerateExtractWebService> </GenerateExtractWebService>	The opening and closing elements of this business rule. Required.
<ExtractName>	String.
<Parameters>	Starting tag for Parameter section
<Parameter>	String.

### XML Example

```
<GenerateExtractWebService>
  <ExtractName>SubmitCorrespondance</ExtractName>
  <Parameters>
    <Parameter>MessageXML</Parameter>
  </Parameters>
</GenerateExtractWebService>
```

## 35. GenerateGroupDetail

### Description

This Business Rule allows applicable group details to be generated onto the Activity at the time it is processed.

### GenerateGroupDetail Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options
<GenerateGroupDetail> </GenerateGroupDetail>	The required opening and closing elements of this business rule.
<Source>	TYPE Activity Group
<GroupFields>	This element defines the group field descriptions, display and type of field.
<GroupField>	Identifies the Group Field Name that will accept input from user or system.
<From>	Defines the field value as source of input.
<To>	Defines the value of the Activity field and initialize the elements of the database.
<Datatype>	Defines the type of field data that will be passed to the Activity.

### XML Example

```
<GenerateGroupDetail>
  <Source TYPE="ACTIVITY" ACTIVITY="ActivityMathVariable"></Source>
  <GroupFields>
```

```

<GroupField>
  <FromCollection>PolicyGuidToPremiumAmountCollection</FromCollection>
  <To>PremiumAmount</To>
  <DataType>Money</DataType>
</GroupField>
<GroupField>
  <From>GroupBillingMethod</From>
  <To>PolicyBillingMethod</To>
  <DataType>Text</DataType>
</GroupField>
</GroupFields>
</GenerateGroupDetail>

```

## 36. GenerateInsertGram

### Description

**GenerateInsertGram Element\Attribute Table**

Element\Tag	Attribute\Definition\Value\Options	
<GenerateInsertGram> </GenerateInsertGram>	The opening and closing elements of the GenerateInsertGram business rule.	
<Insert>		
<XMLText>	XPATH	XPath for xml text
<XSLTText>		
<Changes>		
<Change>	TABLE	Table name
	WHERE	Where clause
	FIELD	Name of the field
	FIELDTYPE	Field type

## 37. GeneratePendingRequirements

### Description

GeneratePendingRequirements business rule is introduced to determine pending requirements on the policy or transaction, in the process of generating activity-level requirements. This business rule defines the field criteria and must be used in conjunction with the DeliveryRequirements business rule to enable completion of generating requirements on an activity. Refer to DeliveryRequirements business rule in the Business Rules Configuration section of the Technical Manual for details. The TransactionBusinessRulePacket connects the GeneratePendingRequirements and DeliveryRequirements Business Rules. Refer to the Transaction Configuration section in the Technical Manual for details. In the TransactionBusinessRulePacket configuration the DeliveryRequirements Business Rule should come before the GeneratePendingRequirements Business Rule.

59 of 96

			<p>set to "Policy", the requirements that are created by processing the activity will be related to the Policy level activity. Even if not defined LEVEL attribute then it takes Policy-Level as a default level to generate pending requirements.</p> <p>Indicates Advance / Future dated effective date is used to create pending requirements.</p> <p><b>Yes</b> - Used to create pending requirements with effective date as advanced date/future dated.</p> <p><b>No</b> - If ADVANCEEFFECTIVEDATE attribute is set to "No" then pending requirements with effective date as advanced date/future dated will not be allowed.</p>	<p>then an error message will be thrown "Not all pending requirements have been met". It will not allow to process the activity until all the requirements have been met. It is normally used for ex: "FreeLookTransaction".</p>
<PendingRequirement>	<p><b>Required and Repeatable element;</b> Starting tag used to identify and detail criteria for</p>	TYPE	<p><b>Code;</b> As defined in AsCodeActivityType table</p>	

	each Requirement.			
<b>&lt;RateDescription&gt;</b>	<b>Required element;</b> Defines the value of the field for variables required to match database requirements in AsLookupRequirement table.	<b>NAME</b>	<b>String</b> Defines the math variable from the transaction which defines the Rate Description name from the AsLookupRequirement table.  <b>String; Required attribute;</b> Defines the Name of Rate Description from the MathVariable VALUE. Name of the Rate Description from the AsLookupRequirement table.	
<b>&lt;DateCriteria&gt;</b>	Defines the value of the DateCriteria field listing the date criteria and required to match AsLookupRequirement database table.		<b>Date;</b> Stores criteria for generating a requirement. Indicates the column in AsLookupRequirement database table. Mathvariable which pulls the effective date from AsLookupRequirement table for the specified "Criteria".	
<b>&lt;Criteria1&gt;</b>	Defines the value of the field listing the Criteria sequence and required to match AsLookupRequirement database table. Multiple criteria are listed		<b>String</b> Stores criteria for generating a requirement in the RateDescription (MathVariable VALUE) and Result.	

	separately and sequentially (i.e. <Criteria1>, <Criteria2>, etc.).		AsLookupRequirement and AsLinkRequirement is linked by Result and LinkValue column respectively.	
--	--	--	--	--

## GeneratePendingRequirements Images

Business Rule

Rule: GeneratePendingRequirements  
Plan Group: (All Plan Groups)  
Plan: (All Plans)  
Type Code: (All Types)

Global/Override(s)

Company	Plan	Fund	Transaction	State	>>
			FlatExtraChange		

Page 2 of 2
Page 1 2
Maximum Results: 20

(Global)					
Acme Life	UL(06/24/2002)		DisabilityChangeRequest		
Acme Life	UL(06/24/2002)		FlatExtraChangeProcess		
Acme Life	ACME Term(01/01/2002)		FlatExtraChange		
Acme Life	Variable Annuity		GenerateRequirements		

Rule Detail

Rule Name: GeneratePendingRequirements Rule Type: System Version: 3  
Long Name: GeneratePendingRequirements  
Keywords: Comments:  
Error Message:  
XML Data:

```

<GeneratePendingRequirements LEVEL="Activity">
  <PendingRequirement>
    <RateDescription NAME="UnderwritingApproval">RequirementName1</RateDescription>
    <Criteria1>RequirementsIndicator1</Criteria1>
  </PendingRequirement>
</GeneratePendingRequirements>

```

Rule(s)

Rule: TransactionBusinessRulePacket

Rule Name: TransactionBusinessRulePack Rule Type: System Version: 7

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>CopyToSegmentFields</Rule>
  <Rule>CopyToPolicyFields</Rule>
  <Rule>DeliveryRequirements</Rule>
  <Rule>GeneratePendingRequirements</Rule>
</TransactionBusinessRulePacket>
```

Attach Download Check Out Delete Close

## Database Tables for GeneratePendingRequirements

Table Name	Description
AsLinkRequirement	Stores a requirements list available for the Delivery Requirements screen and includes LinkValue.
AsLookupRequirement	Stores criteria for generating a requirement in the RateDescription (MathVariable VALUE) and Result.
AsRequirement	Populated by the requirement data results.

## XML Example

```
<GeneratePendingRequirements>
  <PendingRequirement>
    <RateDescription NAME="CA Medical Form">RateDescriptionReplacement</RateDescription>
    <Criteria1>IssueStateCode</Criteria1>
  </PendingRequirement>
  <PendingRequirement>
    <RateDescription NAME="UWApproval">UWApproval</RateDescription>
  </PendingRequirement>
  <PendingRequirement>
    <RateDescription NAME="SuppToApplication">SuppToApplication</RateDescription>
    <Criteria1>IssueStateCode</Criteria1>
  </PendingRequirement>
  <PendingRequirement>
    <RateDescription NAME="NQA1035ExchangeLetter">NQA1035ExchangeLetter</RateDescription>
  </PendingRequirement>
</GeneratePendingRequirements>
```

## 38. GenerateReport

### Description

This Business Rule determines whether or not a report is generated and how the report is configured.

### GenerateReport Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options
<GenerateReport> </GenerateReport>	The opening and closing elements of the GenerateReport business rule.
	TYPE
<OutputFormat>	Name of the output format
<CopyPaths>	
<CopyPath>	Path to copy the generated report
<MailRecipients>	Recipients email address
<Address>	
<Report>	Name of the report to generate
<Parameters>	
<Parameter>	NAME      Name of the parameter
<Printers>	
<Printer>	Name of the printer

## 39. GenerateSuspense

### Description

GenerateSuspense business rule is used to create a Suspense record when the transaction in which the rule is attached is processed. The rule populates a value to the Fixed Fields in the AsSuspense table (SuspenseScreen) as well as to the dynamic fields in the AsSuspenseFields table. Example of these fixed fields are: Policy Number, Effective Date, Amount, Type Code, Status. Some of those fields can be populated based on the configuration defined in this business rule.

Suspense records and Accounting to those Suspense records can be conditionally created.

**Note:** This business rule should work in conjunction with the <Suspense> element in the Transaction. If the GenerateSuspense business rule exists and AutoEntry attribute for the <Suspense> element is defined as YES or not defined at all, then the GenerateSuspense business rule should be used. If <Suspense> element's attribute AutoEntry= "NO" then GenerateSuspense will not be used, even if it exists and the normal validation for AutoEntry= "NO" should be followed.



**GenerateSuspense Element\Attribute Table**

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<b>&lt;GenerateSuspense&gt;</b>	The opening and closing tag of the GenerateSuspense Business Rule.	<b>RULE</b>	<p><b>Optional attribute;</b>  <b>= "SuspenseScreen / SuspenseBatchScreen"</b>  This will be used to decide whether the SuspenseScreen or SuspenseBatchScreen business rule will be used in conjunction with the fields of GenerateSuspense. Depending on which screen rule is used with GenerateSuspense, dynamic fields of that rule's xmldata ( which get values from the rule's fields ), along with the GenerateSuspense fields ( which will get their datatypes by looking through the rule's fields ), will be saved to AsSuspenseField.</p> <p><b>Note:</b></p> <p><i>In ACME, the value of this attribute is either SuspenseScreen or SuspenseBatchScreen</i>  <i>If no screen rule is used with GenerateSuspense, no fields are saved in the AsSuspenseField.</i></p>
<b>&lt;Tests&gt;</b>	<b>Optional element;</b> Allows configuration of Test(s) to see if section of rule should be invoked.		
<b>&lt;Test&gt;</b>	<b>Required / Repeatable element;</b> Condition to add Role to a Policy or a Segment. If this condition is satisfied, the specified role will be added to the Policy or a Segment, otherwise the specified role will not be added.	<b>TYPE</b>	<p><b>Required element value; Expression</b>  An expression to specify a condition</p> <p><b>Optional attribute;</b>  <b>= "Expression"</b>  To indicate the type of the condition</p> <p><b>Example:</b>  &lt;Test  TYPE="Expression"&gt;SomeMath</p>

			Variable=27</Test>
<b>&lt;Suspense&gt;</b>	<p><b>Optional element;</b> The opening and closing tag of the Suspense section of the Business Rule.</p> <p><b>Note:</b></p> <p style="padding-left: 40px;">This element is logically required. If this is omitted, then this business rule has no effect</p>		
<b>&lt;Column&gt;</b>	<p><b>Optional / Repeatable element;</b> Processing the Transaction attached to this business rule generates the Suspense record. This element is used to specify the values with which the records should be created</p> <p><b>Note (Applicable only for Dot Net):</b> Values can be applied to the Fields either by using the &lt;Column&gt; element or by using the &lt;FieldNames&gt; elements directly. (&lt;FieldsNames&gt; element are defined outside of the &lt;Suspense&gt; element. )</p> <p style="padding-left: 40px;">If the Fields names are listed in both of them, then the Column takes the precedence.</p> <p style="padding-left: 40px;">If the field names are not listed in the Column or the values of the Fields listed in the Columns are empty, then it looks for the value is the corresponding &lt;FieldName&gt; element</p>	<b>NAM E</b>	<p><b>Required attribute;</b> <b>= "Field Names in SuspenseScreen or SuspenseBatchScreen"</b> Name of the Columns like TypeCode, Prefix, Amount in SuspenseScreen or SuspenseBatchScreen for which a value should be populated from the Transaction to which GenerateSuspense business rule is attached to.</p>

	and takes it from there.		
<b>&lt;Fields&gt;</b>	<b>Optional element;</b> Used to specify the MathVariables in Transactions from which the values should be copied from and Fields in SuspenseScreen/SuspenseBatchScreen (AsSuspenseField) to which values should be copied to.		
<b>&lt;Field&gt;</b>	<b>Required / Repeatable element;</b> The opening and closing tag that encompasses <From> and <To> elements		
<b>&lt;From&gt;</b>	<b>Required element;</b> The <From> element will contain the name of Field or MathVariable in the Transaction  <b>Note:</b> <FromCollection> is not implemented in both J2EE and Dot Net		<b>Required element value; String</b> The Field Name or MathVariable in the Transaction from which the values should be copied from.
<b>&lt;To&gt;</b>	<b>Required element;</b> The <To> element will contain the name of a dynamic field in SuspenseScreen/SuspenseBatchScreen to which the value should be copied to.		<b>Required element value; String</b> The Field Name or MathVariable in the SuspenseScreen/SuspenseBatchScreen to which the values should be copied to.
<b>&lt;CloseSuspense&gt;</b>	<b>Optional element;</b> Suspense Records created with this rule defaults to Open status ('15) and AttachedAmount=0. This can be overridden by using the <CloseSuspense> element.		
<b>&lt;Tests&gt;</b>	<b>Optional element;</b> Allows configuration of Test(s) to see if section of		

	rule should be invoked.		
<b>&lt;Test&gt;</b>	<b>Required / Repeatable element;</b> Condition to add Role to a Policy or a Segment. If this condition is satisfied, the specified role will be added to the Policy or a Segment, otherwise the specified role will not be added.	<b>TYPE</b>	<b>Required element value; Expression</b> An expression to specify a condition  <b>Optional attribute; = "Expression"</b> To indicate the type of the condition <b>Example:</b> <Test TYPE="Expression">SomeMath Variable=27</Test>
<b>&lt;GenerateAccounting&gt;</b>	<b>Optional element;</b> This element is used to indicate whether the accounting should be performed to the newly generated records		
<b>&lt;Tests&gt;</b>	<b>Optional element;</b> Allows configuration of Test(s) to see if section of rule should be invoked.		
<b>&lt;Test&gt;</b>	<b>Required / Repeatable element;</b> Condition to add Role to a Policy or a Segment. If this condition is satisfied, the specified role will be added to the Policy or a Segment, otherwise the specified role will not be added.	<b>TYPE</b>	<b>Required element value; Expression</b> An expression to specify a condition  <b>Optional attribute; = "Expression"</b> To indicate the type of the condition <b>Example:</b> <Test TYPE="Expression">SomeMath Variable=27</Test>
<b>&lt;ShadowSuspenseOnReversal&gt;</b>	<b>Optional element;</b> This element is used to indicate whether the Suspense should be shadowed upon the reversal of the Transaction. This will prevent the Suspense record to be usable anymore.		
<b>&lt;Tests&gt;</b>	<b>Optional element;</b> Allows configuration of Test(s) to see if section of		

	rule should be invoked.		
<b>&lt;Test&gt;</b>	<b>Required / Repeatable element;</b> Condition to add Role to a Policy or a Segment. If this condition is satisfied, the specified role will be added to the Policy or a Segment, otherwise the specified role will not be added.	<b>TYPE</b>	<b>Required element value; Expression</b> An expression to specify a condition  <b>Optional attribute; = "Expression"</b> To indicate the type of the condition <b>Example:</b> <Test TYPE="Expression">SomeMath Variable=27</Test>
<b>&lt;OpenSuspenseOn Reversal&gt;</b>	<b>Optional element;</b> This element is used to indicate whether a Closed Suspense should be put back to the Open Status upon reversing the Transaction		
<b>&lt;Tests&gt;</b>	<b>Optional element;</b> Allows configuration of Test(s) to see if section of rule should be invoked.		
<b>&lt;Test&gt;</b>	<b>Required / Repeatable element;</b> Condition to add Role to a Policy or a Segment. If this condition is satisfied, the specified role will be added to the Policy or a Segment, otherwise the specified role will not be added.	<b>TYPE</b>	<b>Required element value; Expression</b> An expression to specify a condition  <b>Optional attribute; = "Expression"</b> To indicate the type of the condition <b>Example:</b> <Test TYPE="Expression">SomeMath Variable=27</Test>
<b>&lt;GenerateAccountingOnReversal&gt;</b>	<b>Optional element;</b> This element is used to indicate whether the accounting should be performed when the corresponding Transaction is recycled or reversed		
<b>&lt;Tests&gt;</b>	<b>Optional element;</b> Allows configuration of Test(s) to see if section of rule should be invoked.		

<b>&lt;Test&gt;</b>	<b>Required / Repeatable element;</b> Condition to add Role to a Policy or a Segment. If this condition is satisfied, the specified role will be added to the Policy or a Segment, otherwise the specified role will not be added.	<b>TYPE</b>	<b>Required element value; Expression</b> An expression to specify a condition  <b>Optional attribute; ="Expression"</b> To indicate the type of the condition <b>Example:</b> <Test TYPE="Expression">SomeMath Variable=27</Test>
<b>&lt;CloseSuspenseOn Reversal&gt;</b>	<b>Optional element;</b> This element is used to indicate whether a Suspense record should be Closed upon reversing the Transaction		
<b>&lt;Tests&gt;</b>	<b>Optional element;</b> Allows configuration of Test(s) to see if section of rule should be invoked.		
<b>&lt;Test&gt;</b>	<b>Required / Repeatable element;</b> Condition to add Role to a Policy or a Segment. If this condition is satisfied, the specified role will be added to the Policy or a Segment, otherwise the specified role will not be added.	<b>TYPE</b>	<b>Required element value; Expression</b> An expression to specify a condition  <b>Optional attribute; ="Expression"</b> To indicate the type of the condition <b>Example:</b> <Test TYPE="Expression">SomeMath Variable=27</Test>
<b>&lt;InsertIntoMath&gt;</b>	<b>Optional element;</b> Used to indicate whether the SuspenseGUID of the newly generated Suspense item should be stored in the Math or not. The variable written back into the math can be a string or a collection with an amount.  <b>Note:</b> If this element is omitted then the math variable suspenseGUID will be written back to the		<b>String</b> The Name of the Math variable to which the results should be written to  <b>TYPE</b> Used to define whether single or multiple entries should be written to the Math <b>TEXT</b> - To indicate that only the SuspenseGUID should be written to the Math <b>COLLECTION</b> - To indicate that multiple Suspense items should be written to the Math

	math automatically.		<b>String</b> - MathVariable that resolves to an Integer/Decimal Value Attribute is used only when the COLLECTION attribute is present. Used to populate a value from a collection back into the math.
--	---------------------	--	---

## 40. GenerateSuspenseAccounting

### Description

This Business Rule provides the ability to create accounting detail for a supplied field amount to create a relationship to the suspense record.

### GenerateSuspenseAccounting Element\Attribute Table


Element\Tag	Attribute\Definition\Value\Options
<GenerateSuspenseAccounting> </GenerateSuspenseAccounting>	The opening and closing elements of this business rule. Required.
<SuspenseNumber>	MathVariable defining the Suspense Number String. String
<Amount>	String. Field name

### XML Example

```
<GenerateSuspenseAccounting>
  <SuspenseNumber>TodaysDailySuspenseNumber</SuspenseNumber>
  <Amount>NewAmount</Amount>
</GenerateSuspenseAccounting>
```

## 41. GhostPolicy











### Description

This Business Rule allows policies with listed statuses to be deleted. The Trash Can  icon will display next to the edit button on the Policy Search Results screen where applicable.

### GhostPolicy Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options
<GhostPolicy> </GhostPolicy>	The opening and closing elements of this business rule. Required.
<Status>	Comma separated list that identifies which status(es) the policy status the policies can be deleted. Code (as defined in AsCode StatusCode).

## GhostPolicy Image

Search Results					
Page 1 of 5		Page 1 <u>2</u> 3 4 5		Maximum Results: 10	
Policy Number	Data Entry ID	Status	Owner	Tax ID	
DV20010062		Pending	Naidu, Sridhar	999-99-9999	
DV20010112		Pending	Ravindran, Devika	888-88-8888	
DV20010130		Pending	Naidu, Sridhar	999-99-9999	
DV20010424		Pending	SNMMMMTESTCASEXX, Xavier X.	633-03-5555	
DV20010415		Lapsed	SNMMMMTESTCASEAA, Adam A.	633-01-5555	
DV20010402		Pending	McCahill, Tommy	111-11-1111	
DV20010378		Pending	SNMMMMTESTCASEBA, Alice A.	633-04-5555	
DV20010432		Pending	Galban, Susan	077-88-6666	
DV20010376		Pending	Galban, Susan	077-88-6666	
DV20010419		Pending	SNMMMMTESTCASELL, Lucy L.	633-02-5555	

## XML Example

```
<GhostPolicy>
  <Status>08,66</Status>
</GhostPolicy>
```

## 42. GuaranteedRate

### Description

This Business Rule provides the guaranteed rate for a fixed fund.

### GuaranteedRate Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options	
<GuaranteedRate> </GuaranteedRate>	The opening and closing elements of this business rule. Required.	
<Rate>	Identifies the guaranteed interest rate of a Fixed Fund	Decimal

## XML Example

```
<GuaranteedRate>0.03</GuaranteedRate>
```

## 43. GuidelineValidation

### Description

This Business Rule allows an Activity to validate MinimumPremium, Guideline Single, Guideline Level, and Seven Pay values.

### GuidelineValidation Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options	
<GuidelineValidation>	The opening and closing elements of this business rule. Required.	
<MinimumPremium>	MESSAGE	Edit message   String



<GLSingle>	MESSAGE	Edit message	String
<GLLevel>	MESSAGE	Edit message	String
<PolicyYearStart>	MESSAGE	Edit message	String
<GLSevenPay>	MESSAGE	Edit message	String

## XML Example

```

<GuidelineValidation>
  <MinimumPremium MESSAGE="String">
    <Premium>String</Premium>
  </MinimumPremium>
  <GLSingle MESSAGE="String">
    <Premium>String</Premium>
    <TotalPremium>String</TotalPremium>
  </GLSingle>
  <GLLevel MESSAGE="String">
    <Premium>String</Premium>
    <MoneyTypes>String</MoneyTypes>
    <PolicyYearStart>String</PolicyYearStart>
  </GLLevel>
  <GLSevenPay MESSAGE="String">
    <Premium>String</Premium>
    <IssueDate>String</IssueDate>
    <MoneyTypes>String</MoneyTypes>
  </GLSevenPay>
</GuidelineValidation>

```

## 44. InactiveSegments

### Description

This Business Rule allows an Activity to inactivate segments.

### InactiveSegments Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options
<InactiveSegments> </InactiveSegments>	The opening and closing elements of this business rule. Required.
	String

### XML Example

```

<InactiveSegments>String</InactiveSegments>

```

## 45. InterestRatecode

### Description

This Business Rule defines the type and details for the calculation of interest performed over fixed funds. Interest rate calculation methodologies can be assigned to fixed funds using the InterestRateCode Business Rule. In most cases this rule is overridden on a specific fixed fund (FundGUID).

### InterestRateCode Element\Attribute Table

Element\Tag	Definition	Attribute	Element/Attribute
-------------	------------	-----------	-------------------

			Value and Description
<InterestRateCode>	The opening and closing tag of the InterestRateCode Business Rule. Required.		
<ProcessCode>	Interest crediting method process code. Required.		<b>Code</b> (as defined in AsCode FundType)
<InterestRate>	Interest Rate used in interest rate calculation.		<b>Decimal</b>
<AvoidLeapDays>	Determines whether or not to avoid leap days.		<b>String</b> Yes/No
<GuaranteedPeriod>	Number of days guaranteed.		<b>Number</b>
<RateDescription>	Description of the rate.		<b>String</b>
<LookupType>			<b>String</b>
<RateCriteria>	The criteria used to determine the rate.		<b>String</b>
<BonusRateDescription>	Description of the bonus rate.		<b>String</b>
<BonusPeriod>	Determines the number of days contained in a bonus period.		<b>Number</b>
<DaysInMonth>	Number of days in month.		<b>Number</b>

The following table gives a brief description of each process code:

ProcessCode	Definition
07	Fixed interest rate
08	Interest based on the various durations (money out and guarantee period) of the life of the deposit (optional bonus interest)
09	Interest based on the various dates (money out and guarantee period) of the life of the deposit
10	Interest based on the deposit date
11	Same as 08 (without the optional bonus interest) however, this method also

	calculates MVA dates and rates
12	Same as 09, however, this method also calculates MVA dates abd rates
13	Interest based on rollover dates (rollover dates indicated in valuation) of the deposit (optional bonus interest)
14	Interest based on the various durations (money out and guarantee period) of the life of the policy

## XML Examples

### Process Code 07

```
<InterestRateCode>
  <ProcessCode>08</ProcessCode>
  <InterestRate>.045</InterestRate>
</InterestRateCode>
```

### Process Code 08

```
<InterestRateCode>
  <ProcessCode>08</ProcessCode>
  <GuaranteedPeriod>1</GuaranteedPeriod>
  <RateDescription>FixedRateFile</RateDescription>
  <LookupType>LOOKUP-IMPORT-RATE</LookupType>
</InterestRateCode>
```

### Process Code 09

```
<InterestRateCode>
  <ProcessCode>09</ProcessCode>
  <GuaranteedPeriod INTERVAL="Months">6</GuaranteedPeriod>
  <RateDescription>FixedRateFile</RateDescription>
  <LookupType>LOOKUP-IMPORT-RATE</LookupType>
</InterestRateCode>
```

### Process Code 10

```
<InterestRateCode>
  <ProcessCode>10</ProcessCode>
  <RateDescription TYPE="OVERRIDE">DeferRate</RateDescription>
</InterestRateCode>
```

### Process Code 11

```
<InterestRateCode>
  <ProcessCode>08</ProcessCode>
  <GuaranteedPeriod>1</GuaranteedPeriod>
  <RateDescription>FixedRateFile</RateDescription>
  <LookupType>LOOKUP-IMPORT-RATE</LookupType>
</InterestRateCode>
```

## Process Code 12

```
<InterestRateCode>
  <ProcessCode>12</ProcessCode>
  <GuaranteedPeriod>1</GuaranteedPeriod>
  <RateDescription>FixedRateFile</RateDescription>
  <LookupType>LOOKUP-RATE</LookupType>
  <BonusPeriod>1</BonusPeriod>
  <BonusRateDescription>WulaTDMX5V-Bonus</BonusRateDescription>
  <AvoidLeapDays>Yes</AvoidLeapDays>
</InterestRateCode>
```

## Process Code 13

```
<InterestRateCode>
  <ProcessCode>13</ProcessCode>
  <GuaranteedPeriod>7</GuaranteedPeriod>
  <RateDescription>WulaHorizon</RateDescription>
  <LookupType>LOOKUP-IMPORT-RATE</LookupType>
  <AvoidLeapDays>Yes</AvoidLeapDays>
</InterestRateCode>
```

## Process Code 14

```
<InterestRateCode>
  <ProcessCode>14</ProcessCode>
  <GuaranteedPeriod>1</GuaranteedPeriod>
  <RateDescription>FixedRateFile</RateDescription>
  <LookupType>LOOKUP-RATE</LookupType>
</InterestRateCode>
```

# 46. InterestRateCriteria

## Description

InterestRateCode business rule (overridden at the fund level) defines how interest should be calculated for a particular fund. In this BR, ProcessCode 15 is used to assign an interest rate to a particular fund by pointing it to an AsRate file (hardcoding a value in a <RateDescription> tag). The rule in turn selects the correct interest rate by the Date Criteria in AsRate table. Other than Date Criteria, additional filter criteria can be defined using another business rule called InterestRateCriteria(Overridden at the Plan or Policy level). This rule is just a space for math variable declaration and is executed before InterestRateCode BR so that InterestRateCode BR can have access to these variables. In the InterestRateCode, these variables are set inside //InterestRateCode/RateCriteria/Criteria1. These variables are useful in providing extra filters to the AsRate selection in InterestRateCode BR.

## InterestRateCriteria Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<InterestRateCriteria	Required element;		

>	The opening and closing tag of the InterestRateCriteria business rule.		
<MathVariable>	<b>Required/Repeatable element;</b> Name of MathVariable that are used to specify the additional filters. Anything available in math engine is available here. <b>Note:</b> In the InterestRateCode BR, these MathVariables are set inside //InterestRateCode/RateCriteria/Criteria1 . These variables are useful in providing extra filters to the AsRate selection in InterestRateCode BR.		

## XML Example

```

<InterestRateCriteria>
  <MathVariable VARIABLENAME="IssueStateCode" TYPE="FIELD">Policy:IssueStateCode</MathVariable>
  <MathVariable VARIABLENAME="StateCodeUsed" TYPE="IIF" EXPRESSION="IssueStateCode=30 Or
  IssueStateCode=43">01,99</MathVariable>
  <MathVariable VARIABLENAME="PolicyYear" TYPE="POLICYFIELD">PolicyYear</MathVariable>
  <MathVariable VARIABLENAME="PolicyIssueAge" TYPE="POLICYFIELD">IssueAge</MathVariable>
  <MathVariable VARIABLENAME="AttainedAge" TYPE="EXPRESSION">PolicyIssueAge+PolicyYear-
1</MathVariable>
  <MathVariable VARIABLENAME="PolicyIssueDate" TYPE="POLICYFIELD">IssueDate</MathVariable>
  <MathVariable VARIABLENAME="PolicyDurationSub"
  TYPE="FUNCTION">DurationOf("PolicyIssueDate","EffectiveDate")</MathVariable>
  <MathVariable VARIABLENAME="PolicyDuration" TYPE="IIF" EXPRESSION="PolicyDurationSub > 16">17,
  PolicyDurationSub</MathVariable>
</InterestRateCriteria>

```

## 47. LapseTest

### Description

This Business Rule provides information to the system for testing a policy for lapse.

### LapseTest Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options		
<LapseTest> </LapseTest>	The opening and closing elements of this business rule. Required.		
<Tests>	Allows configuration of Test(s) to see if section of rule should be invoked.		
<Test>	Condition for test		
	<table> <tr> <td>TYPE</td><td>EXPRESSION</td></tr> </table>	TYPE	EXPRESSION
TYPE	EXPRESSION		
<StatusChange>	Code (as defined in AsCodeStatus). Identifies the status change if the test criteria are met.		

## XML Example

```
<LapseTest>
  <Tests>
    <Test TYPE="Expression">"VerifyLapse" = "Lapse"</Test>
  </Tests>
  <StatusChange>05</StatusChange>
</LapseTest>
```

## 48. MapScreen

### Description

This Business Rule allows configuration of the MapScreen.

### MapScreen Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options	
<MapScreen> </MapScreen>	The opening and closing elements of the MapScreen business rule.	
<Map>		
<Names>		
<Name>		
<Value>		
<Display>		
<DataType>		
<Fields>	Start of section listing Transaction columns and fields	
<Field>	Start of a column/field definition block	
<Name>	Value to place in that column/field, substituting for the source Policy column/field value	Any math variable or literal
<Display>	Name of the column/field	Text. Any valid Policy column/field name
<DataType>	Field data type	Text
<Query>		
<OnChange>		
<Change>		

## 49. Masks

### Description

Masking is the process of reformatting a field to make it more readable and user friendly. This Business Rule provides information for masking the fixed and dynamic fields.

### Additional Information:

- The Masking takes effect after moving off of the field.

- Masking can also be used to modify (to hide) the display of sensitive data or information. The hide feature is not part of this Business Rule.

## Masks Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<b>&lt;Masks&gt;</b>	The opening and closing tag of the Masks Business Rule.		
<b>&lt;Mask&gt;</b>	<b>Required, Repeatable;</b> This tag describes each field that will have a data Mask applied.	<b>NAME</b>  <b>DELIMITER</b>  <b>SAVEDELIMITER</b>  <b>MAXLENGTH</b>  <b>MINLENGTH</b>  <b>MESSAGE</b>	<b>Required, String;</b> Name of Field mask applies to.  <b>Required; String; Character</b> used in formatting Multiple delimiters can be used. Example delimiters:  Hyphen => - Open Parenthesis => ( Close Parenthesis => ).  <b>Optional attribute;</b> <b>YES/NO</b> - To indicate whether or not the characters should be saved along with the format in the database.  <b>Optional attribute; Integer;</b> Maximum number of characters that can be entered. (Including the Delimiter character(s).)  <b>Optional attribute; Integer;</b> The minimum number of characters that must be entered for a given field.  <b>Optional attribute; String;</b> Warning message.
<b>&lt;Format&gt;</b>	<b>Required Element; String;</b> Format of data including all delimiter(s).		<b>Required Element value; String;</b> Each position is identified with double backward slashes i.e. "\ d" For e.g.: <Format>\d\d\d\d\d\d-\d\d\d\d d</Format>
<b>&lt;Alternate&gt;</b>	<b>Required Element; String;</b> Format of data		<b>Required Element value; String;</b> Each position is identified with double backward slashes i.e. "\ d"

	without delimiter(s).		For e.g.: <Alternate>\d\d\d\d\d\d\d\d </Alternate>
--	-----------------------	--	--

## XML Example

```
<Masks>
  <Mask NAME="SSN" DELIMITER="-" MAXLENGTH="11">
    <Format>\d\d\d\d\d\d\d\d\d</Format>
    <Alternate>\d\d\d\d\d\d\d\d</Alternate>
  </Mask>
  <Mask NAME="TIN" DELIMITER="-" MAXLENGTH="11">
    <Format>\d\d\d\d\d\d\d\d\d</Format>
    <Alternate>\d\d\d\d\d\d\d\d</Alternate>
  </Mask>
  <Mask NAME="PostalID" DELIMITER="-" MAXLENGTH="9">
    <Format>\d\d\d\d\d\d\d</Format>
    <Alternate>\d\d\d\d\d\d</Alternate>
  </Mask>
  <Mask NAME="Phone" DELIMITER="-" MAXLENGTH="12">
    <Format>\d\d\d\d\d\d\d\d\d\d</Format>
    <Alternate>\d\d\d\d\d\d\d\d\d</Alternate>
  </Mask>
  <Mask NAME="AccountNo" DELIMITER="-" MAXLENGTH="11">
    <Format>\d\d\d\d\d\d\d\d\d</Format>
    <Alternate>\d\d\d\d\d\d\d\d</Alternate>
  </Mask>
  <Mask NAME="DOB" DELIMITER="/" MAXLENGTH="10">
    <Format>\d\d\d\d\d\d\d\d</Format>
    <Alternate>\d\d\d\d\d\d\d</Alternate>
  </Mask>
</Masks>
```

## 50. MaximumValue

### Description

The Business Rule allows an Activity to compare math variables values. Comparison type is greater than.

### MaximumValue Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options	
<MaximumValue>	The opening and closing elements of this business rule. Required.	
<Fields>	MESSAGE	String. Message when Field Value exceeds MaximumValue
<Maximum>	MathVariable Name that defines the Maximum Value	String
<Field>	MathVariable Name that defines the Field Value	String

### XML Example

```
<MaximumValue>
  <Fields MESSAGE="Maxium Issue Age Has been Exceeded.">
    <Maximum>MaxIssueAge</Maximum>
    <Field>AnnuitantAge</Field>
  </Fields>
</MaximumValue>
```



## 51. MigrationScreen

### Description

This Business Rule defines the layout and configuration of the Migration Screen which shows the rule name and the sequence integer of the item in the AsSequence table named Configuration Release Number.

### MigrationScreen Element \ Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<MigrationScreen>	The opening and closing tag of the Migration Screen Business Rule.		
<Fields>	Allows configuration of dynamic fields. Press <Fields> link for additional information on the <Fields> Element configuration.		

### MigrationScreen Image

### Database Tables for MigrationScreen

Table Name	Description
AsMigration	Stores key data related to Migration
AsMigrationField	Stores Field names and values related to the Migration Screen
AsCodeMigrationType	List of all the Migration types

### XML Example

```

<MigrationScreen>
  <Fields>
    <Field>
      <Name>VersionNumber</Name>
      <Display>Version Number</Display>
      <Calculated METHOD="FORCE" TYPE="SQL">SELECT VersionNumber FROM
AsBusinessRu...WHERE'</Calculated>
      <DataType>Text</DataType>
    </Field>
    <Field>
      <Name>MigrateType</Name>
      <Display>Type</Display>

```

```

        <DataType>Combo</DataType>
        <DefaultValue>Migrate</DefaultValue>
        <Query TYPE="FIXED">
            <Options>
            </Options>
        </Query>
    </Field>
    <Field>
        <Name>ImplementationDate</Name>
        <Display>Implementation Date</Display>
        <DataType>Date</DataType>
        <Calculated METHOD="FORCE" TYPE="SQL">SELECT Current Date FROM
SYSIBM.SYSDUMMY1</Calculated>
    </Field>
    <Field>
        <Name>DefectNumber</Name>
        <Display>Test Director/Change Control Number</Display>
        <DataType>Text</DataType>
    </Field>
    <Field>
        <Name>Filler</Name>
        <Display></Display>
        <DataType>Blank</DataType>
    </Field>
    <Field>
        <Name>Comments</Name>
        <Display>Comments</Display>
        <DataType>Text</DataType>
    </Field>
</Fields>
</MigrationScreen>

```

## 52. MinimumValue

### Description

The Business Rule allows an Activity to compare two math variable values. The comparison type is less than.

### MinimumValue Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options	
<MinimumValue> </MinimumValue>	Required element indicting the opening and closing of this business rule.	
<Fields>	This element represents an input control that will accept input from the user or the system.	
	MESSAGE	Message when Field Value is below minimum value
<Minimum>	MathVariable Name that defines the Minimum Value	
<Field>	Name of the field the minimum value is being compared to	

### XML Example

```

<MinimumValue>
    <Fields MESSAGE="One Is Below Minimum">
        <Minimum>Two</Minimum>
        <Field>One</Field>
    </Fields>
</MinimumValue>

```

## 53. MortalityTable

### Description

ONLY FOR BACKWARD COMPATIBILITY. Used in conjunction with the LOOKUP-XML math type.

### MortalityTable Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<TableFile>	The opening and closing tag of the MortalityTable Business Rule.		

### XML Example

```
<TableFile>{46E3E1D1-53A7-4700-9E71-037C67775556}</TableFile>
```

## 54. MultiFields

### Definition - Overall

MultiFields is introduced to enable and allow screen transaction configuration with multiple sets of dynamic field values on various screens. The MultiFields Business Rule is defined through the following two procedures. The first procedure is required to initiate the function through MultiFields RULE, and applies the Rule expression in the parent transaction.

### MultiFields RULE Table – 1

#### Definition - 1

A set of fields that can be repeated is called as a MultiField. MultiFields enables and allows Screen / Transaction configuration with multiple sets of dynamic field values on various screens. To use a MultiField in a business rule or transaction, it has to be first defined using MultiField business rule. It can then be called from other regular business rules using the <MultiField> element. This design of defining a MultiField using a business rule and calling the same from some other business rule using an element is something similar to that of the Function. The following business rule identifies a MultiFields screen configuration, defines the components within the multiple sets of elements, and applies functionality to screen transactions. Please see Element - MultiField to find information on how to call a MultiField from other Screen / Transaction configuration.

**MultiFields Elements\Attribute Table**

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<b>&lt;MultiFields&gt;</b>	<b>Required element;</b> The opening and closing tag of the MultiFields Business Rule. A set of multiple MultiField definitions grouped together is called as MultiFields. The MultiFields element indicates the beginning of the specification of Screen/Transaction fields that can have multiple instances.		
<b>&lt;MultiField&gt;</b>	<b>Required and Repeatable element;</b> This element is used to define the fields, its OnChanges, OnLoads and Validations just like any other field definition section.		
<b>&lt;Title&gt;</b>	<b>Optional element;</b> Defines the field value for the title of the Multi Fields screen to be displayed when the Multi Fields Screen initially opens.  <b>Note:</b>  If this element is not present, then the value "Multi Fields" will be displayed as the name of the MultiFields		<b>Required element value; String</b> Indicates the name of the MultiFields Screen to be displayed with. <b>Ex:</b> <Title>Multiple Client screens</Title>
<b>&lt;Start&gt;</b>	<b>Required element;</b> Indicates the number of instances of fields to be displayed from that MultiField. This drives the Number of Fields Combo on the screen which defines how many MultiField instances are to be drawn. If a Transaction had MultiFields and the Activity Detail screen comes up for a new Activity, the initial number of MultiFields displayed on the		<b>Required element value; Integer</b> Indicates the number of instances of multi fields to be displayed on a Screen or an Activity Detail Screen of a Transaction when initially opens. If the element value is configured as "0" then it will not display any fields, and if the element value is configured as "2" then it will display two instances of multi fields. Applied in hard-code or in SQL.

	Screen is the Start Number. However, if it's a pending activity, the number of MultiFields displayed is the number of MultiFields which actually exist in the database. On changing this Combo, the number of fields drawn will be changed.		<b>Ex:</b> <Start>0</Start> OR <Start>SELECT COUNT * FROM AsRole JOIN AsRoleField ON AsRole.RoleGUID = AsRoleField.RoleGUID AND AsRoleField.FieldName = 'RoleOption' AND AsRoleField.TextValue = '01' WHERE PolicyGUID = '(PolicyGUID)' AND RoleCode IN ('05','07','18')</Start>
<End>	<b>Required element;</b> Indicates the maximum number of instances of MultiFields allowed by the system for that multifield section.		<b>Required element value;</b> <b>Integer</b> Indicates the maximum number of instances of multi fields to be displayed on a Screen or an Activity Detail Screen of a Transaction . If the element value is configured as "4" then it will not display more than four instances of multi fields on multi filed section. Applied in hard-code or in SQL. <b>Ex:</b> <End>4</End> OR <End>SELECT COUNT * FROM AsClient, AsRole, AsCodeRole WHERE AsRole.PolicyGUID = '(PolicyGUID)' AND AsRole.ClientGUID = AsClient.ClientGUID AND AsRole.RoleCode in ('01','04') and AsCodeRole.CodeValue = AsRole.RoleCode</End>
<Fields>	<b>Required / Repeatable element;</b> Allows configuration of dynamic fields.  <b>Note:</b> A field name cannot be repeated across different MultiField sections. I.e.. Names of the Fields used in each MultiField should have unique		
<OnLoad>	<b>Optional element;;</b> Indicates the start of field definition and values applying to math calculation to enable		

	<p>this functionality. Refer to the OnLoad and OnChange sections of the Transaction Configuration section of the Technical Manual. This contains further information about the available options for these elements. &amp;nbsp; <b>Note:</b> This element is applicable when OnChange element is present. It contains a list of field name(s) that triggers the Onchange when the page is loaded.</p>		
<b>&lt;OnChange&gt;</b>	<p><b>Optional element;</b> Container for OnChange configuration. Indicates the start of field element values to facilitate processing when the field change affects the content of another field. This allows change to one or more fields based on the value of a trigger field. OnChange is only stated and applied within a defined multifield section. Refer to the Transaction Configuration section of the Technical Manual for the &lt;OnChange&gt; details and available options.</p>		
<b>&lt;Validation&gt;</b>	<p><b>Optional element;</b> Allows configuration of edits and validations. Provides online page error message via Java Script. Limited to the variables available on the page.</p>		
<b>&lt;Buttons&gt;</b>	<p><b>Optional element;</b> Opening and Closing element that encompasses the list of buttons</p>		
<b>&lt;Button&gt;</b>	<p><b>Required/Repeatable element;</b> Defines the display of function buttons on the Policy screen.</p>		<p><b>Required element value;</b> <b>ButtonName</b> Allows the display of specified buttons on the Policy screen. <b>Note:</b> Following buttons are generally configured on the</p>

			Policy Screen: Activity, Allocate, Close, New, Save and Values buttons.
--	--	--	---

## XML Example:

```
<Transaction ALLOWCONFIRMATION="Yes">
  <EffectiveDate STATUS="Enabled" TYPE="SYSTEM"></EffectiveDate>
  <MultiFields RULE="MultiFields-TestWithdrawal">Yes</MultiFields>
  <Fields>
    <Field>
      <Name>RoleGUID</Name>
      <Display>Payment Recipient</Display>
      <DataType>Combo</DataType>
    </Field>
  </Fields>
</Transaction>
```

## MultiFields - 2

### Description - 2

The second procedure within the MultiFields Business Rule defines the format and elements. MultiFields enables and allows screen transaction configuration with multiple sets of dynamic field values on various screens. The following business rule identifies a MultiFields screen configuration, defines the components within the multiple sets of elements, and applies functionality to screen transactions. Examples of the business rule address the central formats and design to capture the required data for configuration. MultiFields business rule table includes elements global to Multifields application and defines the attribute functionality. These elements are available to all Multifields variations. The elements' descriptions reference the applicable resource for detail in configuration.

### MultiFields Elements\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<b>&lt;MultiField&gt;</b>	The opening and closing tag of the MultiFields Business Rule.		
<b>&lt;Title&gt;</b>	Defines the field value for the title of the MultiField section. Multiple titles are allowed within one multifield section for configuration.		<b>String</b>
<b>&lt;Start&gt;</b>	Required. Indicates the number of MultiFields displayed on screen when the transaction is first opened for additions. Applied in hard-		<b>Integer</b>

	code or in SQL.		
<b>&lt;End&gt;</b>	Required. Indicates the maximum number of MultiFields allowed by the system for that multifield section. Applied in hard-code or in SQL.		<b>Integer</b>
<b>&lt;Fields&gt;</b>	Allows configuration of dynamic fields.		
<b>&lt;OnLoad&gt;</b>	Indicates the start of field definition and values applying to math calculation to enable this functionality.		
<b>&lt;Field&gt;</b>	Name of field to load.		
<b>&lt;OnChange&gt;</b>	Indicates the start of field element values to facilitate processing when the field change affects the content of another field. This allows change to one or more fields based on the value of a trigger field. OnChange is only stated and applied within a defined multifield section. Refer to the Transaction Configuraiton section of the Technical Manual for the <OnChange> details and available options.		
<b>&lt;Validation&gt;</b>	Required. Indicates the opening tag that defines the criteria to validate the activity data and response. The field value determines changes in default allocations and only applies to that section.		<b>String</b>
<b>&lt;Button&gt;</b>	Name of button. Defines the function buttons in the Screen Business Rules.		<b>String</b>



## MultiFields Images

Screen example for client type follows:

## XML Examples

```
<MultiFields>
  <MultiField>
    <Title>Multifield Section 1</Title>
    <Start>0</Start>
    <End>2</End>
    <Fields>
      <Field>
        <Name>ClientUWRiskClass</Name>
        <Display>Client UW Risk Class</Display>
        <DataType>Text</DataType>
      </Field>
      <Field>
        <Name>ClientUWRiskClassDescription</Name>
        <Display> Client UW Risk Class Description </Display>
        <DataType>Text</DataType>
      </Field>
      <Field>
        <Name>MortalityAssumption%</Name>
        <Display>Mortality Assumption %</Display>
        <DataType>Data</DataType>
      </Field>
    </Fields>
  </MultiField>
</MultiFields>
```

```

        <Name>MortalityAssumptionTable</Name>
        <Display>Mortality Assumption Table</Display>
        <DataType>Combo</DataType>
    </Field>
    <Field>
        <Name>AlfaClass</Name>
        <Display>Alfa Class</Display>
        <DataType>Combo</DataType>
    </Field>
</Fields>
<OnLoad/>
<OnChange/>
<Validation/>
</MultiField>
</MultiFields>

```

XML Example of several MultiField titles within the Multifields Business Rule:

```

MultiFields>
  <MultiField>
    <Title>Multifield Section 1</Title>
    <Start>0</Start>
    <End>2</End>
    <Fields>
      <Field>
        <Name>MFS1_Field1</Name>
        <Display>Field 1 of Secion 1</Display>
        <DataType>Text</DataType>
      </Field>
      <Field>
        <Name>MFS1_Field2</Name>
        <Display>Field 2 of Secion 1</Display>
        <DataType>Text</DataType>
      </Field>
    </Fields>
  </MultiField>
  <MultiField>
    <Title>MultiField Section 2</Title>
    <Start>Select count(</Start>
    <End>2</End>
    <Fields>
      <Field>
        <Name>MFS2_Field1</Name>
        <Display>Field 1 of Secion 2</Display>
        <DataType>Text</DataType>
      </Field>
      <Field>
        <Name>MFS2_Field2</Name>
        <Display>Field 2 of Secion 2</Display>
        <DataType>Text</DataType>
      </Field>
    </Fields>
  </MultiField>
<OnLoad/>
<OnChange/>
<Validation/>
</MultiField>
</MultiFields>

```

## 55. MultiRowProcessing

The MultiRowProcessing business rule is used to execute array processing where the result is multiple spawns of the same transaction. Array processing is the loop the rule performs. This is accomplished through a SQL statement in the rule. The number of rows brought back by this SQL statement correlates to the number of activities that will be spawned. MultiRowProcessing can also perform math calculations within this rule whereby the raw data for the math can be pulled in through the SQL statement.

### Note:

- The transaction being spawned must be defined with a SPAWNCODE equal to '08'(SpawnCode that represents Multiple Spawns that spawns an activity for each Pattern Field (Field0, Field1, etc)).
- All SpawnField data must be defined in the MultiRowProcessing Business Rule.
- Transaction level override is required for this transaction.

### Example:

If processing a Withdrawal type activity and there are two different beneficiaries to payout, this business rule would allow multirow to spawn the multiple payouts needed.

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<MultiRowProcessing>	<b>Required element;</b> The opening and closing tag of the MultiRowProcessing Business Rule.		
<MultiRowProcessing>	<b>Required element;</b> The opening and closing tag of the MultiRowProcess tag.		
<Query>	<b>Required element;</b> Indicates the Query to define the controls for rows being processed. The Select statement for the query is used to obtain values needed to properly spawn the appropriate number of transactions.	<b>TYPE</b>	<b>Required element value;</b> <b>SQL</b> - Select statement calling the rows to process <b>String</b> - An IF statement to process the query  <b>Required attribute;</b> <b>= "SQL"</b> Type of Query.
	<b>Required element;</b>		

<b>&lt;InitializeGlobalValues&gt;</b>	This element is used to initialize values that will be used for running totals.		
<b>&lt;GlobalVariable&gt;</b>	<p><b>Required element;</b> This element is used to keep a running total of pertinent values as MultiRowProcessing loops through the MathVariables for each result set. <b>Note:</b> The Term GlobalVariable mentioned in this tag is replaced with the actual MathVariable name. <b>For Example:</b> &lt;UpdateGlobalValues&gt;     &lt;RunningAmount     TYPE="EXPRESSION"&gt;TotalAmount&lt;/RunningAmount&gt;     &lt;RunningTaxable     TYPE="EXPRESSION"&gt;TotalTaxable&lt;/RunningTaxable&gt; &lt;/UpdateGlobalValues&gt;</p>	<b>TYPE</b>	<p><b>Required element value; Integer</b> <b>Example-</b> The Current Death Benefit Remaining Amount is updated as a portion of the death benefit is it has been paid to each primary beneficiary. Beginning DB Amount: \$ 100,000.00 Portion paid to 1st Bene: \$ - 75,000.00 DBRemainingAmount: \$ 25,000.00</p> <p><b>Required element value; = "VALUE"</b> - The running amount total for each result set.</p>
<b>&lt;MultiRowValues&gt;</b>	<p><b>Required element;</b> Declares a section of Math Variables that are executed in a loop. <b>Note:</b> Math can be used to calculate values used by the Spawns (each Spawn can have its own values)</p> <p>All of the SpawnFields must be identified in MultiRowProcessing</p> <p>Must identify the Effective Date that the spawn will use (even if all use the same date)</p>		
<b>&lt;MathVariables&gt;</b>	<b>Optional element;</b> Opening and closing element for MathVariable section.		
<b>&lt;MathVariable&gt;</b>	<b>Required element;</b> Declares math variable being used		

	<b>Example:</b> <b>J2EE</b> <MultiRowValues> <MathVariables> <MathVariable VARIABLENAME="ActivityDate TYPE="FIELD" DATATYPE="DATE">Activity:EffectiveDate</M athVariable> </MathVariables> </MultiRowValues>		
<UpdateGlobalVal ues>	<b>Required element;</b> Update variables declared in InitializedGlobalValues.		
<GlobalVariable>	<b>Required/Repeatable element;</b> Declares math variable being used. <b>Note:</b> The Term GlobalVariable mentioned in this tag is replaced with the actual MathVariable name.  <b>For Example:</b> <UpdateGlobalValues> <RunningAmount TYPE="EXPRESSION">TotalAmount</Runnin gAmount> <RunningTaxable TYPE="EXPRESSION">TotalTaxable</Runnin gTaxable> </UpdateGlobalValues>		
<InsertDefinitions>	<b>Required element;</b> Inserts the variables listed into the Activity's Math so they are accessible for the Spawned Activity. These values are not configured directly into the Transaction XML.		
<Definition>	<b>Required/Repeatable element;</b> The name referenced in MultiRowProcessing. <b>Note:</b> The result of each row is identified by the "NAME" then the row #	<b>NAME</b>          <b>LOG</b>	<i>Required element value; Math Variable from &lt;MultiRowValu es&gt;</i> The value of the Definition is the name referenced in MultiRowProces sing  <i>Required</i>

			<p><b>Element value;</b> The exact 'From' name referenced in the SpawnField (or used in the Spawn Criteria)</p> <p><b>Optional attribute;</b> <b>Yes/No</b> <b>Yes</b> - The values will be written to the math and the AsActivityMath table when the activity has completed processing <b>No</b> - No values are written to the AsActivityMath table. <b>Note:</b> When this attribute is not present, the default behavior is as if LOG is set to No</p>
--	--	--	--

## XML Example

```

<MultiRowProcessing>
  <MultiRowProcess>
    <Query TYPE="SQL">SELECT ... FROM ...</Query>
    <InitializeGlobalValues>
      <TotalAssigneeAmt TYPE="VALUE">0</TotalAssigneeAmt>
    </InitializeGlobalValues>
    <MultiRowValues>
      <EffectiveDate TYPE="FIELD">EffectiveDate</EffectiveDate>
      <AssigneeInterestAmount TYPE="IIF" EXPRESSION="AssigneeNewInterestAmount &gt;
0">"AssigneeNewInterestAmount, (AssigneePaymentAmount / ( BeneAmountPaidPercent * TotalAmountPayable
)))*InterestAmountFromOtherAccount"</AssigneeInterestAmount>
      <AssigneeSingleAmount TYPE="IIF" EXPRESSION="AssigneeIncludeInterest =
'01'">"AssigneePaymentAmount + AssigneeInterestAmount, AssigneePaymentAmount"</AssigneeSingleAmount>
      <AssigneeSingleAmount TYPE="IIF" EXPRESSION="AssigneeIncludeInterest =
'02'">"AssigneePaymentAmount + AssigneeNewInterestAmount, AssigneePaymentAmount +
AssigneeInterestAmount"</AssigneeSingleAmount>
      <AssigneePayeeAddressGUID
TYPE="FIELD">AssigneeAddressGUID</AssigneePayeeAddressGUID>
      <AssigneePayeeGUID TYPE="FIELD">AssigneePayeeGUID</AssigneePayeeGUID>
      <AssigneeRoleGUID TYPE="FIELD">AssigneeRoleGUID</AssigneeRoleGUID>
      <TotalAssigneeAmt TYPE="EXPRESSION">TotalAssigneeAmt +
AssigneeSingleAmount</TotalAssigneeAmt>
    </MultiRowValues>
    <UpdateGlobalValues>
      <RunningAmount>TotalAssigneeAmt</RunningAmount>

```

```

        </UpdateGlobalValues>
        <InsertDefinitions>
            <Definition NAME="EffectiveDate" LOG="Yes">EffectiveDate</Definition>
            <Definition NAME="AssigneePayeeGUID" LOG="Yes">AssigneeClientGUID</Definition>
            <Definition NAME="AssigneeInterestAmount"
LOG="Yes">AssigneeInterestAmount</Definition>
            <Definition NAME="AssigneeSingleAmount"
LOG="Yes">AssigneeSingleAmount</Definition>
            <Definition NAME="AssigneePayeeAddressGUID"
LOG="Yes">AssigneePayeeAddressGUID</Definition>
            <Definition NAME="AssigneeRoleGUID">AssigneeRoleGUID</Definition>
        </InsertDefinitions>
    </MultiRowProcess>
</MultiRowProcessing>

```

## 56. MVAAmountFormula

### Description

This Business Rule defines all expressions needed for MVA Amount calculation during valuation. Market Value Adjustment deals with the difference calculated between how the market is doing versus how the clients funds are doing. MVAAmountFormula is used to keep track of the difference between the two. Based on the calculations a deduction or credit is made to individuals invested in MVA Funds.

**Note:** During Valuation, this Business Rule will be invoked in the order as mentioned in ValuationCalculationOrder BR.

### MVAAmountFormula Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<b>&lt;MVAAmountFormula&gt;</b>	The opening and closing tag of the MVAAmountFormula Business Rule.		
<b>&lt;MVAInput&gt;</b>	<b>Required element;</b> The opening and closing element that indicates the list of inputs needed to calculate the MVA Amount		
<b>&lt;MathVariables&gt;</b>	<b>Required element;</b> Start of MathVariables section.		
<b>&lt;MathVariable&gt;</b>	<b>Required / Repeatable element;</b> To define the list of MathVariables to indicate the values needed to calculate the MVA Amount.		

## 57. NUVPickMethod

### Description

This Business Rule allows configuration of the NUVPickMethod.

### NUVPickMethod\Attribute Table

Element\Tag	Attribute\Definition\Value\Options
<NUVPickMethod> </NUVPickMethod>	The opening and closing elements of the NUVPickMethod business rule.