

# **Business Rule Configuration Part 3**

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# 1. PlanActivityScreen

Allows control of aspects of the Plan level Activity Screen. This configuration will determine the number of activities that will be shown on the Plan-Level Activity screen, set the date from which to display activities and can be configured to display additional Fields as well as provide warnings and/or restrictions to processing Plan level Activities.

**PlanActivityScreen Element\Attribute Table**

Element/Tag	Definition	Attribute	Element/Attribute Value and Description	Additional Information
<PolicyActivityScreen>	The opening and closing tag of the Policy Activity Screen Business Rule.			
<MaximumRows>	Defines the maximum number of Activities that will display on each page of the PolicyActivityScreen. If Tag is not present or their is an illegal value (non-integer) the default is 100.		<b>Integer:</b> Valid values are 5, 10, 15, 20, 100.	
<FromDate>	Defines the From Date field as the start date the user wants to display Activities from.		<b>BeginningOfYear:</b> Displays beginning of the year based upon current system date. <b>BeginningOfMonth:</b> Displays beginning of the month based upon current system date. <b>PreviousDay:</b> Displays previous day of system date. <b>Blank:</b> Displays blank value If the element is not present default is blank.	
<FixedFields>	Allows configuration of fixed fields.			
<Field>	The opening tag for each Fixed Field being			

	configured.			
<b>&lt;Name&gt;</b>	Exact name of the Field (database name).		<b>String</b>	
<b>&lt;Display&gt;</b>	Display name of the field, indicates how the field will display on the screen.	<b>MASK</b>	<b>Display Name</b> <b>Optional Attribute; Date/SSN</b>	
<b>&lt;Disabled&gt;</b>	Indicated if the Fixed Field should be visible but no entry is allowed.		<b>Yes/No/ReadOnly</b>	
<b>&lt;Hidden&gt;</b>	Indicates if the Fixed Field should be hidden.		<b>Yes/No</b>	
<b><u>&lt;Fields&gt;</u></b>	Allows configuration of dynamic fields. Press <Fields> link for additional information on the <Fields> Element configuration.			
<b>&lt;Field&gt;</b>	The opening tag for each dynamic Field being configured.		Only applicable data type is Label.	
<b>&lt;Calculated&gt;</b>	Defines the type of query.	<b>TYPE</b>	<b>Required Attribute; SQL</b>	
<b>&lt;ScreenTimes&gt;</b>	<p><b>Optional element;</b> This element is used to limit the access to the activities based on the Time of day, Business day (or Non-Business day), End of Month or Quarter or Year or through the Tests conditions (Security Role, Activity columns, Effective Date of the Activity, Client Number etc )</p> <p><b>Note:</b> &lt;ScreenTimes&gt; section is backward compatible. i.e. If this section does not exist in this business rule then the system will use the &lt;ScreenTimes&gt; section</p>			



	defined in TransactionTimes Business rule.			
<Prohibit>	<p><b>Required/Repeatable element;</b> This element is used to specify the list of actions that can be restricted and display the necessary alert messages.</p>	<p><b>TYPE</b></p> <p><b>Optional attribute;</b> <b>= "Delete/Add/Edit/Process/Reverse/Recycle"</b> This attribute is used to specify the action that should be restricted. <b>Note:</b>  If this attribute is not present, then no restriction is applied to any of the actions If a button is made inaccessible, then a custom message shall be configured to communicate the same to the User.</p> <p><b>Delete</b> - To restrict the User from deleting a Pending activity, by clicking the Delete button. <b>Note:</b> Delete button on the activity screen refers to the trashcan icon on the right of a pending activity.</p> <p><b>Add</b> - To restrict the User from adding an activity in this screen, by clicking the ADD button <b>Note:</b> ADD button is displayed next to the Activity dropdown box in the PolicyActivityScreen.</p> <p><b>Edit</b> - To restrict the User from editing the details of a Pending activity, by clicking the Edit button. <b>Note:</b> Edit button on the PolicyActivityScreen</p> <p><b>MESSAGE</b></p>		

			<p>refers to the icon on the left of a Pending activity.</p> <p><b>Process</b> - To restrict the User from processing a Pending activity, by clicking the Process button</p> <p><b>Note:</b> Process button refers to lightening bolt icon right of the pending activity.</p> <p><b>Reverse</b> - To restrict the User from reversing an active activity, by clicking the Delete button</p> <p><b>Note:</b> Delete button refers to the trashcan icon on the right of an active activity.</p> <p><b>Recycle</b> - To restrict the User from recycling an active activity.</p> <p><b>Note:</b> Recycle button refers to the icon (blue and pink arrows) on the right of a processed activity.</p> <p><b>Optional attribute;</b> <b>= "Warning Message"</b> If a button is made inaccessible, then a custom message shall be configured to communicate the same to the User</p> <p><b>Note:</b> In the absence of this attribute, a default message will be displayed.</p>	
<StartTime>	<p><b>Optional element;</b> This element is used to specify the Starting time from when the User should be restricted from performing certain tasks.</p> <p><b>Note:</b> If this element is</p>		<p><b>Required element value;</b> <b>Integer/String</b></p> <p><b>Integer</b> - Time of day expressed in Military time</p> <p><b>String</b> - a) FieldName</p>	

	included, then <EndTime> element MUST exist. Action is prohibited during this time range.		from AsSystemDateField E.g. MarketStartTime b) SystemDate from AsSystemDate E.g. SystemDate	
<EndTime>	<b>Optional element;</b> This element is used to specify the Ending time until when the User should be restricted from performing certain tasks. <b>Note:</b> If this element is included, then <StartTime> element MUST exist. Action is prohibited during this time range.		<b>Required element value;</b> <b>Integer/String</b> <b>Integer</b> - Time of day expressed in Military time <b>String</b> - a) FieldName from AsSystemDateField E.g. MarketEndTime b) SystemDate from AsSystemDate E.g. SystemDate	
<BusinessDayIndicator>	<b>Optional element;</b> This element can be used to find if the current System date is a Business day or not and apply the restrictions accordingly. <b>Note:</b> This element can be used instead of using <StartTime> and <EndTime> elements.  The presence of this element in this business rule itself invokes the verification of whether a System Date is a business day or not  The values are stored in the BusinessDayIndicator column of AsSystemDate.		<b>Required element value;</b> <b>Yes/No</b> <b>Yes</b> - Indicates that if the current System Date is a Business day, only then the specified access should be restricted <b>No</b> - Indicates that if the current System Date is not a Business day, only then the specified access should be restricted.	
<MonthEndIndicator>	<b>Optional element;</b> This element can be used to find if the current System date is the last day of the Month or not and apply the restrictions accordingly. <b>Note:</b> This element can be used instead of using <StartTime> and		<b>Required element value;</b> <b>Yes/No</b> <b>Yes</b> - Indicates that if the current System Date is the last day of the Month, only then the specified access should be restricted <b>No</b> - Indicates that if the	

	<p>&lt;EndTime&gt; elements.</p> <p>The presence of this element in this business rule itself invokes the verification of whether a System Date is a last day of the Month or not</p> <p>The values are stored in the MonthEndIndicator column of AsSystemDate.</p>		<p>current System Date is not the last day of the Month, only then the specified access should be restricted.</p>	
<QuarterEndIndicator>	<p><b>Optional element;</b> This element can be used to find if the current System date is the last day of the Quarter or not and apply the restrictions accordingly. <b>Note:</b> This element can be used instead of using &lt;StartTime&gt; and &lt;EndTime&gt; elements.</p> <p>The presence of this element in this business rule itself invokes the verification of whether a System Date is a last day of the Quarter or not</p> <p>The values are stored in the QuarterEndIndicator column of AsSystemDate.</p>		<p><b>Required element value;</b> <b>Yes/No</b> <b>Yes</b> - Indicates that if the current System Date is the last day of the Quarter, only then the specified access should be restricted <b>No</b> - Indicates that if the current System Date is not the last day of the Quarter, only then the specified access should be restricted.</p>	
<YearEndIndicator>	<p><b>Optional element;</b> This element can be used to find if the current System date is the last day of the Year not and apply the restrictions accordingly. <b>Note:</b> This element can be used instead of using &lt;StartTime&gt; and &lt;EndTime&gt; elements.</p> <p>The presence of this element in this business rule itself invokes the</p>		<p><b>Required element value;</b> <b>Yes/No</b> <b>Yes</b> - Indicates that if the current System Date is the last day of the Year, only then the specified access should be restricted <b>No</b> - Indicates that if the current System Date is not the last day of the Year, only then the specified access should be restricted.</p>	

	<p>verification of whether a System Date is a last day of the Year or not</p> <p>The values are stored in the YearEndIndicator column of AsSystemDate.</p>			
<b>&lt;Tests&gt;</b>	<p><b>Optional element;</b> Start of the test section for the action being prohibited. Restriction is invoked if test condition is met. If all of the tests evaluate to true then the restriction will apply. Activity, client, security, security role and system date columns will be available using the colon notation. System date will be used as an auxiliary field and will also be available for tests.</p>			
<b>&lt;Test&gt;</b>	<p>The value of this tag will be an expression. This expression will determine if the restriction should be invoked.</p>		<p><b>String:</b> Expression. Conditional test. Activity, client, security, security role and system date columns will be available using the colon notation. System date will be used as an auxiliary field and will also be available for tests. See the below that has the possible options for the tests section.</p> <p>Activity columns can be all columns in AsActivity table. Client columns can be all columns in AsClient table. SystemDate columns can be all columns in AsSystemDate table. Security columns can be all columns in AsSecurity table.</p>	

			<p>SecurityRole columns can be all columns in AsSecurityRole table.</p> <p><b>Exp.</b> Activity:EffectiveDate = System:SystemDate.</p>	
<b>&lt;Warnings&gt;</b>	<p>Defines the warnings node, warning messages are defined via business rules and are optional. They may exist at the Screen Rule level or at the Transaction Cosmetics Rule level. Warnings defined in the Transaction Cosmetic Rule take priority over the Screen Rule.</p>			<p>If no element exists, the default will be to not display any confirmation warning message.</p>
<b>&lt;DeleteWarning&gt;</b>	<p>Controls if warning is given when Activity is Deleted. If Tag is not present no warning will be displayed.</p>	<b>MESSAGE</b>	<p><b>String</b></p> <p>Displays message as specified when MESSAGE attribute value is specified.</p> <p>Displays default message, "Are you sure?" when MESSAGE="" i.e. When MESSAGE attribute value is not specified.</p> <p><b>Yes</b> - Tag/Element value <b>No</b> - Tag/Element value</p>	<p>Provide the user a confirmation warning message for the Delete button click action to prevent the user from inadvertently deleting a pending Activity.</p>
<b>&lt;ReverseWarning&gt;</b>	<p>Controls if warning is given when Activity is Reversed. If Tag is not present no warning will be displayed.</p>	<b>MESSAGE</b>	<p><b>String</b></p> <p>Displays message as specified when MESSAGE attribute value is specified.</p> <p>Displays default message, "Are you sure?" when MESSAGE="" i.e. When MESSAGE attribute value is not specified.</p>	<p>Provide the user a confirmation warning message for the Reverse button click action to prevent the user from inadvertently reversing an active Activity.</p>

			Yes - Tag/Element value No - Tag/Element value	
<b>&lt;RecycleWarning&gt;</b>	Controls if warning is given when Activity is Recycled. If Tag is not present no warning will be displayed.	<b>MESSAGE</b>	<b>String</b>  Displays message as specified when MESSAGE attribute value is specified.  Displays default message, "Are you sure?" when MESSAGE="" i.e. When MESSAGE attribute value is not specified.  Yes - Tag/Element value No - Tag/Element value	Provide the user a confirmation warning message for the Recycle button click action to prevent the user from inadvertently recycling an active Activity.

## XML Example

```

<PlanActivityScreen>
  <MaximumRows>10</MaximumRows>
  <FromDate>Blank</FromDate>
  <Fields>
    <Field>
      <Name>EffectiveDate</Name>
      <Display>Effective Date</Display>
      <DataType>Label</DataType>
      <Calculated TYPE="SQL">IF (SELECT TOP 1 EffectiveDate FROM AsActivity JOIN AsTransaction ON
AsActivity.TransactionGUID =
      AsTransaction.TransactionGUID AND TransactionName = 'Issue' WHERE TransactionName = 'Issue' AND
AsActivity.TypeCode IN
      ('01','04') AND AsActivity.StatusCode IN ('01','14') AND AsActivity.PlanGUID = '[PlanGUID]') > '2/2/1900'
BEGIN SELECT TOP 1
      CONVERT(varchar(10), EffectiveDate, 101) FROM AsActivity JOIN AsTransaction ON
AsActivity.TransactionGUID =
      AsTransaction.TransactionGUID AND TransactionName = 'Issue' WHERE TransactionName = 'Issue' AND
AsActivity.TypeCode IN
      ('01','04') AND AsActivity.StatusCode IN ('01','14') AND AsActivity.PlanGUID = '[PlanGUID]' END ELSE
SELECT "</Calculated>
    </Field>
  </Fields>
  <Warnings>
    <DeleteWarning MESSAGE="This Activity will be deleted">Yes</DeleteWarning>
    <RecycleWarning MESSAGE="This Activity will be recycled">Yes</RecycleWarning>
    <ReverseWarning MESSAGE="This Activity will be reversed">Yes</ReverseWarning>
  </Warnings>
  <ScreenTimes>
    <!-- Phone Rep Can not Delete (Pending) backdated pending activities -->
    <Prohibit TYPE="Delete" MESSAGE="You can not delete this activity at this time.">
      <StartTime>0001</StartTime>
      <EndTime>SystemDate:MarketCloseTime</EndTime>
    <Tests>
      conditional test to determinine of restriction should apply
      <Test>Activity:EffectiveDate.getTime() < SystemDate.getTime()</Test>
      <Test>"SecurityRole:SecurityRoleName" = "PhoneServiceRep" OR "SecurityRole:SecurityRoleName" =
      "PhoneServiceRepWithLiquidity"</Test>
    </Tests>
  </ScreenTimes>
</PlanActivityScreen>

```

```

    </Tests>
  </Prohibit>
  <!-- Phone Rep Can not Delete (Pending) backdated or current dated pending activiites AMC -->
  <Prohibit TYPE="Delete" MESSAGE="You can not delete this activity at this time.">
    <StartTime>SystemDate:MarketCloseTime</StartTime>
    <EndTime>0001</EndTime>
    <Tests>
      <Test>Activity:EffectiveDate.getTime() <= SystemDate.getTime()</Test>
      <Test>"SecurityRole:SecurityRoleName" = "PhoneServiceRep" OR "SecurityRole:SecurityRoleName" =
        "PhoneServiceRepWithLiquidity"</Test>
    </Tests>
  </Prohibit>
  <!-- Phone Manager Can not Delete current dated pending activiites when they were the user that added the
activity -->
  <Prohibit TYPE="Delete" MESSAGE="You can not delete this activity at this time.">
    <StartTime>SystemDate:MarketCloseTime</StartTime>
    <EndTime>0001</EndTime>
    <Tests>
      <Test>Activity:EffectiveDate.getTime() = SystemDate.getTime()</Test>
      <Test>"SecurityRole:SecurityRoleName" = "PhoneServiceMgr"</Test>
      <Test>"Security:ClientNumber" = "Activity:ClientNumber"</Test>
    </Tests>
  </Prohibit>
</ScreenTimes>
</PlanActivityScreen>

```

## 2. PlanCosmetics

### Description

PlanCosmetics Business Rule controls the display of buttons on Plan screen. Withholding, Allocate, Activity and FundClassAllocate buttons are commonly configured on this screen. This business rule is overridden at the Plan level.

### PlanCosmetics Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<PlanCosmetics>	The opening and closing tag of the PlanCosmetics Business Rule.		
<Buttons>	<b>Required Element;</b> Defines Buttons tag.		
<Button>	Defines the display of function buttons on Plan screen.	<b>WITHHOLDING</b> <b>ALLOCATION</b> <b>ACTIVITY</b> <b>FUNDCLASSALLOCATE</b>	Usually Withholding, Allocate, Activity, FundClassAllocate buttons are configured on this screen.



## 3. PlanScreen

### Description

This Rule enables the user to define Plan specific data and allows other business rules to reference the data. This Rule defines the elements and values of the PlanScreen Business Rule including validation.

### PlanScreen Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<PlanScreen>	The opening and closing tag of the Plan Screen Business Rule.		
<Fields>	<b>Required.</b> Field Element is Repeatable. Allows configuration of the dynamic field(s) which define the contents of the Plan Screen.		All Elements, Attributes and their values are described in the Link.
<Validation>	Allows configuration of edits and validations for the Fields defined to the Plan Screen.		All Elements, Attributes and their values are described in the Link.

### PlanScreen Image

<b>Policy</b>	<b>Client</b>	<b>Inquiry</b>	<b>Batch</b>	<b>Tables</b>	<b>Rules</b>	<b>Administration</b>	<b>System</b>
Company: <input type="text"/>		Plan: <input type="text"/>		Effective Date: <input type="text"/>			
Product Code: <input type="text"/>		Max Issue Age: <input type="text"/>					
Min Face Amount: <input type="text"/>							
<input type="button" value="Save"/>				<input type="button" value="Close"/>			

## PlanScreen Database Tables

ASPLANFIELD			
Name	Datatype	Null Option	Comment
PLANGUID	CHARACTER(36)	NOT NULL	Plan GUID
FIELDNAME	VARCHAR(50)	NOT NULL	Name of each Plan Field
FIELDTYPECODE	VARCHAR(2)	NOT NULL	From AsCode.CodeValue where Codename = AsCodeField
DATEVALUE	TIMESTAMP	NULL	Contains value if FieldTypeCode = 01
TEXTVALUE	VARCHAR(255)	NULL	Contains value if FieldTypeCode = 02
INTVALUE	INTEGER	NULL	Contains value if FieldTypeCode = 03
FLOATVALUE	DECIMAL(20,10)	NULL	Contains value if FieldTypeCode = 04

## XML Example

```

<PlanScreen>
  <Fields>
    <Field>
      <Name>ProductCode</Name>
      <Display>Product Code</Display>
      <DataType>Text</DataType>
    </Field>
    <Field>
      <Name>MaximumIssueAge</Name>
      <Display>Max Issue Age</Display>
      <DataType>Integer</DataType>
    </Field>
    <Field>
      <Name>MinimumFaceAmount</Name>
      <Display>Min Face Amount</Display>
      <DataType>Money</DataType>
    </Field>
  </Fields>
  <Validation>
    <Required>
      <Field>ProductCode</Field>
    </Required>
  </Validation>
</PlanScreen>

```

## 4. PlanSort

### Description

A new business rule titled PlanSort will be introduced. This rule functions as control to the plan sort and the default display of plans.

### PlanSort Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options
< PlanSort> </PlanSort >	Required element indicating the sort of policy plans
<Plan>	Indicates the field value to define the policy plan name. The Appendix 2 – Transaction Configuration document contains further information about the <Plan> element and the available options. Text

## XML Example

```
< PlanSort>
  <Plan>{E327C5C2-DF0D-10A8-A80B-3CCCEC2E6011}</Plan>
  <Plan>{79D063E6-C08A-4CB4-8B75-D0C83970051A}</Plan>
</PlanSort>
```

## 5. PolicyActivityScreen

Allows the control of aspects of the Policy level Activity Screen. This configuration will determine the number of activities that will be shown on the Policy-Level Activity screen, set the date from which to display activities and can be configured to display additional Fields as well as provide warnings and/or restrictions to processing Policy level Activities.

**PolicyActivityScreen Element\Attribute Table**

Element/Tag	Definition	Attribute	Element/Attribute Value and Description	Additional Information
<b>&lt;PolicyActivityScreen&gt;</b>	The opening and closing tag of the Policy Activity Screen Business Rule.			
<b>&lt;MaximumRows&gt;</b>	Defines the maximum number of Activities that will display on each page of the PolicyActivityScreen. If Tag is not present or their is an illegal value (non-integer) the default is 100.		<b>Integer:</b> Valid values are 5, 10, 15, 20, 100.	
<b>&lt;FromDate&gt;</b>	Defines the From Date field as the start date the user wants to display Activities from.		<b>BeginningOfYear:</b> Displays beginning of the year based upon current system date. <b>BeginningOfMonth:</b> Displays beginning of the month based upon current system date. <b>PreviousDay:</b> Displays previous day of system date. <b>Blank:</b> Displays blank value If the element is not present default is blank.	

<b>&lt;FixedFields&gt;</b>	Allows configuration of fixed fields.			
<b>&lt;Field&gt;</b>	The opening tag for each Fixed Field being configured.			
<b>&lt;Name&gt;</b>	Exact name of the Field (database name).		<b>String</b>	
<b>&lt;Display&gt;</b>	Display name of the field, indicates how the field will display on the screen.	<b>MASK</b>	<b>Display Name</b> <b>Optional Attribute;</b> <b>Date/SSN</b>	
<b>&lt;Disabled&gt;</b>	Indicated if the Fixed Field should be visible but no entry is allowed.		<b>Yes/No/ReadOnly</b>	
<b>&lt;Hidden&gt;</b>	Indicates if the Fixed Field should be hidden.		<b>Yes/No</b>	
<b>&lt;Fields&gt;</b>	Allows configuration of dynamic fields.			
<b>&lt;Field&gt;</b>	The opening tag for each dynamic Field being configured.		Only applicable data type is Label.	
<b>&lt;Calculated&gt;</b>	Defines the type of query.	<b>TYPE</b>	<b>Required Attribute;</b> <b>SQL</b>	
<b>&lt;ScreenTimes&gt;</b>	<b>Optional element;</b> This element is used to limit the access to the activities based on the Time of day, Business day (or Non-Business day), End of Month or Quarter or Year or through the Tests conditions (Security Role, Activity columns, Effective Date of the Activity, Client Number etc ) <b>Note:</b> ScreenTimes>			

	section is backward compatible. i.e. If this section does not exist in this business rule then the system will use the <ScreenTimes> section defined in TransactionTimes Business rule.			
<Prohibit>	<p><b>Required/Repeatable element;</b> This element is used to specify the list of actions that can be restricted and display the necessary alert messages.</p>	TYPE	<p><b>Optional attribute; = "Delete/Add/Edit/Process/Reverse/Recycle"</b> This attribute is used to specify the action that should be restricted. <b>Note:</b> If this attribute is not present, then no restriction is applied to any of the actions</p> <p>If a button is made inaccessible, then a custom message shall be configured to communicate the same to the User.</p> <p><b>Delete</b> - To restrict the User from deleting a Pending activity, by clicking the Delete button. <b>Note:</b> Delete button on the activity screen refers to the trashcan icon on the right of a pending activity.</p> <p><b>Add</b> - To restrict the User from adding an activity in this screen, by clicking the ADD button <b>Note:</b> ADD button is displayed next to the Activity dropdown box in the PolicyActivityScreen.</p> <p><b>Edit</b> - To restrict the User from editing the details of a Pending activity, by clicking the Edit button. <b>Note:</b> Edit button on the PolicyActivityScreen refers to the icon on the left of a</p>	

		<b>MESSAGE</b>	<p>Pending activity.</p> <p><b>Process</b> - To restrict the User from processing a Pending activity, by clicking the Process button  <b>Note:</b> Process button refers to lightening bolt icon right of the pending activity.</p> <p><b>Reverse</b> - To restrict the User from reversing an active activity, by clicking the Delete button  <b>Note:</b> Delete button refers to the trashcan icon on the right of an active activity.</p> <p><b>Recycle</b> - To restrict the User from recycling an active activity.  <b>Note:</b> Recycle button refers to the icon (blue and pink arrows) on the right of a processed activity.</p> <p><b>Optional attribute; = "Warning Message"</b>  If a button is made inaccessible, then a custom message shall be configured to communicate the same to the User  <b>Note:</b> In the absence of this attribute, a default message will be displayed.</p>	
<b>&lt;StartTime&gt;</b>	<p><b>Optional element;</b>  This element is used to specify the Starting time from when the User should be restricted from performing certain tasks.  <b>Note:</b> If this element is included, then &lt;EndTime&gt; element MUST exist. Action is prohibited during this time range.</p>		<p><b>Required element value; Integer/String</b>  <b>Integer</b> - Time of day expressed in Military time  <b>String</b> - a) FieldName from AsSystemDateField  Example: MarketStartTime  b) SystemDate from AsSystemDate  Example: SystemDate</p>	

<b>&lt;EndTime&gt;</b>	<p><b>Optional element;</b> This element is used to specify the Ending time until when the User should be restricted from performing certain tasks. <b>Note:</b> If this element is included, then &lt;StartTime&gt; element MUST exist. Action is prohibited during this time range.</p>		<p><b>Required element value;</b> <b>Integer/String</b> <b>Integer</b> - Time of day expressed in Military time <b>String</b> - a) FieldName from AsSystemDateField E.g. MarketEndTime b) SystemDate from AsSystemDate E.g. SystemDate</p>	
<b>&lt;BusinessDayIndicator&gt;</b>	<p><b>Optional element;</b> This element can be used to find if the current System date is a Business day or not and apply the restrictions accordingly. <b>Note:</b> This element can be used instead of using &lt;StartTime&gt; and &lt;EndTime&gt; elements.</p> <p>The presence of this element in this business rule itself invokes the verification of whether a System Date is a business day or not</p> <p>The values are stored in the BusinessDayIndicator column of AsSystemDate.</p>		<p><b>Required element value;</b> <b>Yes/No</b> <b>Yes</b> - Indicates that if the current System Date is a Business day, only then the specified access should be restricted <b>No</b> - Indicates that if the current System Date is not a Business day, only then the specified access should be restricted.</p>	
<b>&lt;MonthEndIndicator&gt;</b>	<p><b>Optional element;</b> This element can be used to find if the current System date is the last day of the Month or not and apply the restrictions accordingly. <b>Note:</b> This element can be used instead</p>		<p><b>Required element value;</b> <b>Yes/No</b> <b>Yes</b> - Indicates that if the current System Date is the last day of the Month, only then the specified access should be restricted <b>No</b> - Indicates that if the current System Date is not the last day of the Month,</p>	

	<p>of using &lt;StartTime&gt; and &lt;EndTime&gt; elements.</p> <p>The presence of this element in this business rule itself invokes the verification of whether a System Date is a last day of the Month or not</p> <p>The values are stored in the MonthEndIndicator column of AsSystemDate.</p>		only then the specified access should be restricted.	
<QuarterEndIndicator>	<p><b>Optional element;</b> This element can be used to find if the current System date is the last day of the Quarter or not and apply the restrictions accordingly. <b>Note:</b> This element can be used instead of using &lt;StartTime&gt; and &lt;EndTime&gt; elements.</p> <p>The presence of this element in this business rule itself invokes the verification of whether a System Date is a last day of the Quarter or not</p> <p>The values are stored in the QuarterEndIndicator column of AsSystemDate.</p>		<p><b>Required element value; Yes/No</b> <b>Yes</b> - Indicates that if the current System Date is the last day of the Quarter, only then the specified access should be restricted <b>No</b> - Indicates that if the current System Date is not the last day of the Quarter, only then the specified access should be restricted.</p>	
<YearEndIndicator>	<p><b>Optional element;</b> This element can be used to find if the current System date is the last day of the</p>		<p><b>Required element value; Yes/No</b> <b>Yes</b> - Indicates that if the current System Date is the last day of the Year, only then</p>	



	<p>Year not and apply the restrictions accordingly.  <b>Note:</b> This element can be used instead of using &lt;StartTime&gt; and &lt;EndTime&gt; elements.</p> <p>The presence of this element in this business rule itself invokes the verification of whether a System Date is a last day of the Year or not</p> <p>The values are stored in the YearEndIndicator column of AsSystemDate.</p>		<p>the specified access should be restricted  <b>No</b> - Indicates that if the current System Date is not the last day of the Year, only then the specified access should be restricted.</p>	
<Tests>	<p><b>Optional element;</b>  Start of the test section for the action being prohibited. Restriction is invoked if test condition is met. If all of the tests evaluate to true then the restriction will apply. Activity, client, security, security role and system date columns will be available using the colon notation. System date will be used as an auxiliary field and will also be available for tests.</p>			
<Test>	<p>The value of this tag will be an expression. This expression will determine if the restriction should be invoked.</p>		<p><b>String:</b> Expression. Conditional test. Activity, client, security, security role and system date columns will be available using the colon notation. System date will be used as an auxiliary field and will also be available for tests. See the</p>	

			<p>below that has the possible options for the tests section.</p> <p>Activity columns can be all columns in AsActivity table. Client columns can be all columns in AsClient table. SystemDate columns can be all columns in AsSystemDate table. Security columns can be all columns in AsSecurity table. SecurityRole columns can be all columns in AsSecurityRole table.</p> <p><b>Exp.</b> Activity:EffectiveDate = System:SystemDate.</p>	
<b>&lt;Warnings&gt;</b>	<p>Defines the warnings node, warning messages are defined via business rules and are optional. They may exist at the Screen Rule level or at the Transaction Cosmetics Rule level. Warnings defined in the Transaction Cosmetic Rule take priority over the Screen Rule.</p>			<p>If no element exists, the default will be to not display any confirmation warning message.</p>
<b>&lt;DeleteWarning&gt;</b>	<p>Controls if warning is given when Activity is Deleted. If Tag is not present no warning will be displayed.</p>	<b>MESSAGE</b>	<p><b>String</b></p> <p>Displays message as specified when MESSAGE attribute value is specified. Displays default message, "Are you sure?" when MESSAGE="" i.e. When MESSAGE attribute value is not specified.</p> <p><b>Yes</b> - Tag/Element value <b>No</b> - Tag/Element value</p>	<p>Provide the user a confirmation warning message for the Delete button click action to prevent the user from inadvertently deleting a pending Activity.</p>
<b>&lt;ReverseWarning&gt;</b>	<p>Controls if warning is given when Activity is Reversed. If Tag is not present no warning will be</p>	<b>MESSAGE</b>	<p><b>String</b></p> <p>Displays message as specified when MESSAGE</p>	<p>Provide the user a confirmation warning message for the Reverse button click action to prevent the</p>

	displayed.		<p>attribute value is specified. Displays default message, "Are you sure?" when MESSAGE="" i.e. When MESSAGE attribute value is not specified.</p> <p><b>Yes</b> - Tag/Element value <b>No</b> - Tag/Element value</p>	user from inadvertently reversing an active Activity.
<b>&lt;RecycleWarning&gt;</b>	Controls if warning is given when Activity is Recycled. If Tag is not present no warning will be displayed.	<b>MESSAGE</b>	<p><b>String</b></p> <p>Displays message as specified when MESSAGE attribute value is specified. Displays default message, "Are you sure?" when MESSAGE="" i.e. When MESSAGE attribute value is not specified.</p> <p><b>Yes</b> - Tag/Element value <b>No</b> - Tag/Element value</p>	Provide the user a confirmation warning message for the Recycle button click action to prevent the user from inadvertently recycling an active Activity.

## XML Example

```

<PolicyActivityScreen>
  <MaximumRows>10</MaximumRows>
  <FromDate>Blank</FromDate>
  <Fields>
    <Field>
      <Name>EffectiveDate</Name>
      <Display>Effective Date</Display>
      <DataType>Label</DataType>
      <Calculated TYPE="SQL">IF (SELECT TOP 1 EffectiveDate FROM AsActivity JOIN AsTransaction ON
AsActivity.TransactionGUID =
  AsTransaction.TransactionGUID AND TransactionName = 'Issue' WHERE TransactionName = 'Issue' AND
AsActivity.TypeCode IN
  ('01','04') AND AsActivity.StatusCode IN ('01','14') AND AsActivity.PolicyGUID = '[PolicyGUID]' ) > '2/2/1900'
BEGIN SELECT TOP 1
  CONVERT(varchar(10), EffectiveDate, 101) FROM AsActivity JOIN AsTransaction ON
AsActivity.TransactionGUID =
  AsTransaction.TransactionGUID AND TransactionName = 'Issue' WHERE TransactionName = 'Issue' AND
AsActivity.TypeCode IN
  ('01','04') AND AsActivity.StatusCode IN ('01','14') AND AsActivity.PolicyGUID = '[PolicyGUID]' END ELSE
SELECT "</Calculated>
    </Field>
  </Fields>
  <Warnings>
    <DeleteWarning MESSAGE="This Activity will be deleted">Yes</DeleteWarning>
    <RecycleWarning MESSAGE="This Activity will be recycled">Yes</RecycleWarning>
    <ReverseWarning MESSAGE="This Activity will be reversed">Yes</ReverseWarning>
  </Warnings>
  <ScreenTimes>
    <!-- Phone Rep Can not Delete (Pending) backdated pending activities -->
    <Prohibit TYPE="Delete" MESSAGE="You can not delete this activity at this time.">
    <StartTime>0001</StartTime>
  </ScreenTimes>
</PolicyActivityScreen>

```

```

<EndTime>SystemDate:MarketCloseTime</EndTime>
<Tests>
conditional test to determine if restriction should apply
<Test>Activity:EffectiveDate.getTime() < SystemDate.getTime()</Test>
<Test>"SecurityRole:SecurityRoleName" = "PhoneServiceRep" OR "SecurityRole:SecurityRoleName" =
"PhoneServiceRepWithLiquidity"</Test>
</Tests>
</Prohibit>
<!-- Phone Rep Can not Delete (Pending) backdated or current dated pending activities AMC -->
<Prohibit TYPE="Delete" MESSAGE="You can not delete this activity at this time.">
<StartTime>SystemDate:MarketCloseTime</StartTime>
<EndTime>0001</EndTime>
<Tests>
<Test>Activity:EffectiveDate.getTime() <= SystemDate.getTime()</Test>
<Test>"SecurityRole:SecurityRoleName" = "PhoneServiceRep" OR "SecurityRole:SecurityRoleName" =
"PhoneServiceRepWithLiquidity"</Test>
</Tests>
</Prohibit>
<!-- Phone Manager Can not Delete current dated pending activities when they were the user that added the
activity -->
<Prohibit TYPE="Delete" MESSAGE="You can not delete this activity at this time.">
<StartTime>SystemDate:MarketCloseTime</StartTime>
<EndTime>0001</EndTime>
<Tests>
<Test>Activity:EffectiveDate.getTime() = SystemDate.getTime()</Test>
<Test>"SecurityRole:SecurityRoleName" = "PhoneServiceMgr"</Test>
<Test>"Security:ClientNumber" = "Activity:ClientNumber"</Test>
</Tests>
</Prohibit>
</ScreenTimes
</PolicyActivityScreen>

```

## 6. PolicyChangeAction

### Description

This business rule will allow the user to specify a transaction to execute when the “Save” button is clicked.

### PolicyChangeAction Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<b>&lt;PolicyChangeAction&gt;</b>	The opening and closing tag of the PolicyChangeAction Business Rule.		
<b>&lt;Policy&gt;</b>	Defines the field value for the Status code of the policy.	<b>STATUS</b>	<b>String</b>
<b>&lt;Action&gt;</b>	Indicates the field values defining the type of action for the	<b>TYPE</b>	""*""  PolicyUpdate

	policy change.		
<b>&lt;TriggerFields&gt;</b>	Indicates the valid Policy Field names that when changed, trigger the Action.		<b>String</b>
<b>&lt;Field&gt;</b>	This element defines the field descriptions, display, and type of fields for PolicyChangeAction activity. Refer to the Transaction Configuration section of the Technical Manual for details and options for the <Field> element and available options.		<b>String</b>
<b>&lt;Spawns&gt;</b>	Indicates the start of spawns action and determines spawn functionality for the specified transaction. Refer to the Transaction Configuration section of the Technical Manual for details and options.		
<b>&lt;Spawn&gt;</b>	Defines the condition to initiate the spawn and applies Math variables to determine whether to spawn the specified transaction. The Appendix 2 - Transaction Element document contains further information about the Spawn element and the available options.	<b>IF</b>	:Policy:TotalBaseFaceAmt <> New:Policy:TotalBaseFaceAmt Old:Policy:DateOfBirth <> New:Policy:DateofBirth
<b>&lt;Transaction&gt;</b>	Defines the transaction spawn code field values. Same spawn codes	<b>SPAWNCODE</b>	01 - 09, 20

	available as for activities.		
<b>&lt;SpawnFields&gt;</b>	Start of transaction/activity fields specification. Refer to the Transaction Configuration section of the Technical Manual that contains details of the <SpawnFields> element and the available options.		
<b>&lt;SpawnField&gt;</b>	Indicates the values for spawn field definition.		
<b>&lt;From&gt;</b>	Defines the Rule/math variable source for the spawned field.		<b>String</b>
<b>&lt;To&gt;</b>	Defines the value of the Activity field.		<b>String</b>
<b>&lt;DataType&gt;</b>	Defines the valid field value of the DataType.		<b>String</b>

### Database Tables for PolicyChangeAction

Table Name	Description
AsCodeStatus	From AsCode.CodeValue where CodeName = 'AsCodeStatus'
AsCode	Contains a listing and description of all valid codes and their values

### XML Example

XML Example:

```

<PolicyChangeAction>
  <Policy STATUS="02">
    <Action TYPE="PolicyUpdate">
      <TriggerFields>
        <Field>TotalBaseFaceAmt</Field>
        <Field>DateOfBirth</Field>
      </TriggerFields>
      <Spawns>

```

```

        <Spawn IF="Old:Policy:TotalBaseFaceAmt <> New:Policy:TotalBaseFaceAmt ||
Old:Policy:DateOfBirth <> New:Policy:DateOfBirth">
        <Transaction SPAWNCODE="01">CalculateSegments</Transaction>
        <SpawnFields>
            <SpawnField>
                <From>New:Policy:InsuranceAge</From>
                <To>PolicyInsuranceAge</To>
                <DataType>Text</DataType>
            </SpawnField>
            <SpawnField>
                <From>Old:Policy:TotalBaseFaceAmt</From>
                <To>OldPolicyTotalBaseFaceAmt</To>
                <DataType>Money</DataType>
            </SpawnField>
            <SpawnField>
                <From>New:Policy:TotalBaseFaceAmt</From>
                <To>NewPolicyTotalBaseFaceAmt</To>
                <DataType>Money</DataType>
            </SpawnField>
            <SpawnField>
                <From>Old:Policy:DateOfBirth</From>
                <To>OldDateOfBirth</To>
                <DataType>Date</DataType>
            </SpawnField>
            <SpawnField>
                <From>New:Policy:DateOfBirth</From>
                <To>NewDateOfBirth</To>
                <DataType>Date</DataType>
            </SpawnField>
        </SpawnFields>
    </Spawn>
</Spawns>
</Action>
</Policy>
</PolicyChangeAction>

```

## 7. PolicyOverviewScreen

### Description

This business rule allows for the configuration of the PolicyOverviewScreen. The PolicyOverviewScreen is used to consolidate Policy data onto one screen. Configuration will determine what type of information is displayed - roles, comments, pertinent field data, and transaction entry.

**PolicyOverviewScreen Element\Attribute Table**

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<b>&lt;PolicyOverviewScreen&gt;</b>	The opening and closing tag of the PolicyOverviewScreen Business Rule.		
<b>&lt;ShowRoles&gt;</b>	Displays Policy level roles on PolicyOverviewScreen		<b>Yes</b> - Displays Policy roles in the PolicyOverviewScreen

	en.	<b>INCLUDESEGMENTROL ES</b>	en <b>No</b> - Policy roles will not be displayed in the PolicyOverviewScreen.  <b>Yes</b> - Displays Segment roles in addition to Policy Roles <b>No</b> - Segment roles are not displayed. Default.
<b>&lt;Comments&gt;</b>	Display comment block on screen.		
<b>&lt;Query&gt;</b>	SQL statement that returns comment GUIDs. Query tag allows you to control comments displayed by specific activity.		
<b>&lt;Fields&gt;</b>	Display values of dynamic Policy fields.		
<b>&lt;Field&gt;</b>	The opening and closing tag for each Field being configured.		
<b>&lt;Name&gt;</b>	Exact name of the Field (database name).		
<b>&lt;Display&gt;</b>	Display Name of the Field, indicates how the field will display on the screen. Required	<b>MASK</b>	Defines the mask of the field.
<b>&lt;DataType&gt;</b>	DataType of the Field. Defines the format of the data and functionality. Should match the datatype of the PolicyField		<b>Check</b> - Check box field <b>Combo</b> - Combination/drop down field <b>Date</b> - Date field with calendar icon <b>Decimal</b> - Displays





			<p>operator, or string, then evaluating the expression.</p> <p><b>REPLACE</b> - Replaces one substring with another substring</p> <p><b>RULE</b> - Executes the referenced rule</p> <p><b>IFEMPTY</b> - Used to check if a Field Value is empty, used in conjunction with a sql statement to retrieve a value to populate the field</p> <p><b>FORCE</b> - For Fields the FORCE attribute is used to force the field to have the calculated value every time the screen is loaded.</p>
<b>&lt;Hidden&gt;</b>	Indicates if Field should be hidden. Allows values to be carried in Activity XML but not displayed.	<b>DISPLAYACTIVITYTAB</b>	<p><b>Yes</b> - If 'Yes', field is hidden from user.</p> <p><b>No</b></p>
<b>&lt;Query&gt;</b>	Used with the Combo DataType to retrieve options for the combo box.	<b>TYPE</b>	<p><b>SQL</b> - SELECT Statement that returns the values to be displayed in the combo box. The Query must return a Code Value and a Text description.</p> <p><b>FIXED</b> - Uses Options tag to fill the options.</p> <p><b>RADIO</b> - Uses Options tag to fill the options.</p>
<b>&lt;Disabled&gt;</b>	Indicates if Field should be visible but no entry is allowed.		<p><b>Yes</b> - field is locked down and grayed out.</p> <p><b>ReadOnly</b> - field is locked down but</p>

			grayed out.
<b>&lt;FixedFields&gt;</b>	Allows configuration of 'above the line' fields.		
<b>&lt;Values&gt;</b>	Set a variable to the element value.		
<b>&lt;PolicyValues&gt;</b>	The opening and closing tag of the PolicyValues Business Rule.		
<b>&lt;Fields&gt;</b>	Display values of dynamic Policy Fields		
<b>&lt;Field&gt;</b>	The opening and closing tag for each Field being configured.	<b>TITLE</b> <b>FORMAT</b>	<b>String</b> - exact name of policy value mathvariable.  Currency or a date
<b>&lt;Transactions&gt;</b>	Allows entry of Activities via the PolicyOverview section.	<b>DISPLAYACTIVITYTAB</b>	<b>Yes</b> - Displays the Activities on the PolicyOverviewScreen <b>No</b> - Does not display Activities on the PolicyOverviewScreen
<b>&lt;Transaction&gt;</b>	Exact name on transaction that can be entered via this screen. Transaction must be configured for this plan.		<b>String</b>
<b>&lt;Onload&gt;</b> <b>&lt;OnChange&gt;</b>	Click on the Onload/Onchange link for further information regarding these Elements. Refer to the Transaction Configuration section of Technical Manual for more		

	information.		
--	--------------	--	--

## XML Example

```
<PolicyOverviewScreen>
  <ShowRoles INCLUDESEGMENTROLES="Yes">Yes</ShowRoles>
  <Comments>
    <Query>select commentGuid .....where....</Query>
  </Comments>
</PolicyOverviewScreen>
```

## 8. PolicyRolesScreen

### Description

This business rule allows for the configuration of the Policy Roles screen. This rule consists of an XML table that contains the table structure which includes Policy, PolicyField, Role, RoleField, Plan, PlanField, PlanGroup, and PlanGroupField. Each of these groups maps to a table in the database. All code values will automatically be converted to its short description in the AsCode table. The Policy Roles screen is visible by clicking on the Roles button displayed on the Client screen.

### PolicyRolesScreen Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<b>&lt;PolicyRolesScreen&gt;</b>	The opening and closing tag of the Policy Roles Screen business rule.		
<b>&lt;Table&gt;</b>	Defines the table which describes the attributes of the non-configurable fields to be included in the specified table.		
<b>&lt;Column&gt;</b>	Defines the format of the columns to be displayed on the specified table.	<b>WIDTH</b>  <b>ALIGN</b>  <b>FORMAT</b>  <b>EDITABLE</b>	Defines the column widths of the table and the number of characters that can be displayed in the specified column. Value is numeric.  "LEFT"  "CENTER"

			"RIGHT"
<Display>		RECONCILE	String
<Group> <Display> <Name>	The group (Or AsTable) that stores the Field that is being displayed.	FIELD  TOTAL	Label or display (on the PolicyRolesScreen) for the Field. Name of the Field that will be displayed on the PolicyRolesScreen.  <b>FIELDTOTAL.</b> Label or display (on the PolicyRolesScreen) for the Field Name that will be displayed on the Policy Roles Screen.
<Group>		ROLECODE	String

## PolicyRolesScreen Image

The screenshot shows a web application window titled "Policies Related to". It includes a header with "Page 1 of 5", "Page 1 2 3 4 5", and "Maximum Results: 10". Below the header is a table with the following columns: Contract Number, Search Name, Status, Plan, Role, and a checkbox column. The table contains 10 rows of data. At the bottom of the window is a "Close" button.

Contract Number	Search Name	Status	Plan	Role	
UL30008966	AGENTLOOKUP	Pending	UL	Writing Agent	<input type="checkbox"/>
AVA30008974	N-TEST2	Reviewed	Variable Annuity	Owner Beneficiary	<input type="checkbox"/>
AVA30008978	N-TEST3	Reviewed	Variable Annuity	Owner Beneficiary	<input type="checkbox"/>
UL26008987		Pending	UL	Servicing Representative	<input type="checkbox"/>
Term30008998		Pending	ACME Term	Primary Beneficiary	<input type="checkbox"/>
FIXED0003600		Pending	Acme Fixed	Owner	<input type="checkbox"/>
FIXED0003601		Pending	Acme Fixed	Owner	<input type="checkbox"/>
FIXED0003601		Pending	Acme Fixed	Payer	<input type="checkbox"/>
UL30009091		Active	UL	Servicing Representative	<input type="checkbox"/>
UL30009094		Pending	UL	Servicing Representative	<input type="checkbox"/>

## PolicyRolesScreen Database Tables

Table Name	Description
AsPlan	Names and starting dates of plans
AsPlanField	Stores Field names and values related to Plans
AsPlanGroup	Stores parent and child plans
AsPolicy	Stores key data related to Policies
AsPolicyField	Stores Field names and values related to Policies
AsRole	Defines the roles that clients can play relative to a policy
AsRoleField	Stores Field names and values related to Roles

## XML Example

```
<PolicyRolesScreen>
  <Table>
    <Column WIDTH="135" ALIGN="LEFT" FORMAT="Text">
      <Display>Contract Number</Display>
      <Group>Policy</Group>
      <Name>PolicyNumber</Name>
    </Column>
    <Column WIDTH="135" ALIGN="LEFT" FORMAT="Text">
      <Display>Search Name</Display>
      <Group>Policy</Group>
      <Name>PolicyName</Name>
    </Column>
    <Column WIDTH="135" ALIGN="LEFT" FORMAT="Text">
      <Display>Status</Display>
      <Group>Policy</Group>
      <Name>StatusCode</Name>
    </Column>
    <Column WIDTH="135" ALIGN="LEFT" FORMAT="Text">
      <Display>Plan</Display>
      <Group>Plan</Group>
      <Name>PlanName</Name>
    </Column>
    <Column WIDTH="135" ALIGN="LEFT" FORMAT="Text">
      <Display>Role</Display>
      <Group>Role</Group>
      <Name>RoleCode</Name>
    </Column>
  </Table>
</PolicyRolesScreen>
```

## 9. PolicyScreen

### Description

Policy is the foundation of an insurance contract. PolicyScreen is one of the building blocks of the Policy Administration System.

This Business Rule is used to configure the Fixed and Dynamic fields of the Policy Screen to achieve the below:

- 1) Capturing the basic information required for the Policy like Effective Date, Issue Date, Issue State PolicyNumber etc
- 2) Perform Policy level allocation
- 3) Define roles, role counts, role percents, and client types for roles that are required for a policy
- 4) Define Segment requirements
- 5) Enabling/Disabling of Policy field, State Approvals

This screen is overridden at the Plan level.

### PolicyScreen Element\Attribute Table

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

<FixedFields>	<p><b>Optional element;</b> This element allows the fixed fields to have the same configuration capabilities as dynamic ( below the line ) fields, the only exception being the ability to change the fixed field data types</p>		
<Fields>	<p><b>Required element;</b> Allows configuration of dynamic fields. <b>Note:</b> Configurable sub elements for &lt;Field&gt; element are Name, Display, DataType, Query, Options, Option, OptionValue, OptionText, Disabled, Hidden, Tag, Length, ToolTip and Calculated.</p> <p>Icons for PolicySearchScreen and ClientSearchScreen can be configured in the PolicyScreen by using the Policy and Client datatype, which will be displayed as disabled text boxes with Search and People icon, respectively. Searching which returns the respective GUIDs.</p>		

<b>&lt;MultiFields&gt;</b>	<p><b>Optional element;</b> Allows configuration of MultiFields in the PolicyScreen</p> <p><b>Additional Information:</b> MultiFields enables and allows Policy Screen with multiple sets of dynamic field values</p>	<b>RULE</b>	<p><b>Required Element Value; Yes/No</b> MultiFields enables and allows Policy Screen with multiple sets of dynamic field values. The yes/No element values can be used to turn On/Off the multifields section on PolicyScreen. <b>Yes</b> - Enables the MultiField Business Rule (turns on) and if set to "Yes" Multi Fields should be generated on the PolicyScreen <b>No</b> - Defaults and disables the Multifield Business Rule (turns off) and if set to "No" Multi Fields should not be generated on the PolicyScreen. If this element is not present default is "No".</p> <p><b>Required attribute; = "MultiField BusinessRuleName"</b> <b>For e.g.:</b> &lt;MultiFields RULE="MultiFields-TestWithdrawal"&gt;Yes&lt;/MultiFields&gt;</p>
<b>&lt;Buttons&gt;</b>	<p><b>Required element;</b> Allows configuration of Buttons.</p>		
<b>&lt;Button&gt;</b>	<p><b>Required element;</b> Defines the display of function buttons on the Policy screen.</p>		<p><b>Required Element value; ButtonName</b> Allows the display of specified buttons on the Policy screen. <b>Note:</b> Following buttons are generally configured on the Policy Screen: <b>Activity, Allocate, Close, New, Save and Values</b> buttons.</p>
<b>&lt;OnLoad&gt;</b>	<b>Optional</b>		



	<p><b>Element;</b> Indicates the start of field definition and values applying to math calculation to enable this functionality. Refer to the OnLoad and OnChange sections of the Transaction Configuration section in the Technical Manual. This contains further information about the available options for these elements.</p> <p><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>		
<OnChange>	<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</p>		

	stated and applied within a defined multifield section. Refer to the Transaction Configuration section of the Technical Manual for the <OnChange> details and available options.		
<Validation>	<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.		
<SegmentsAllowed>	<b>Optional element;</b> Specifies the number of Segments that are allowed on the Policy.		<b>Required element value; Integer / *</b> Number of segments. Allows the user to add only up to specified no. of segments to the policy,  This star * symbol indicates that unlimited number of Segments can be allowed for a Policy.
<MinimumSegments>	<b>Optional element;</b> Specifies the minimum number of Segments that MUST be attached to a Policy before any activity can be processed.		<b>Optional element value; Integer</b> Number of segments. This enforces the User to add at least the minimum number of segments prior to processing the Policy activities.
<ShowSegmentRoles>	<b>Optional element;</b> Shows segment		<b>Optional element value; Yes/No</b> <b>Yes-</b> Allows display of

	<p>roles on policy Roles screen and in the Clients drop down box on the policy Client screen.</p> <p><b>Note:</b> Segment should have at least one field of datatype, "Role" and the same should have assigned with a role.</p>		<p>Segment roles on Segment tab of Policy and the added segment roles, in the Policy's Client drop down box</p> <p><b>No</b> - When set to "No" Segment roles will not be displayed on Segment tab of Policy or in the drop down box of Clients on the Clients tab of the Policy.</p>
<DisablePolicyFields>	<p><b>Optional element;</b> Specifies when fields on the PolicyScreen can or cannot be edited, based on Policy Status. Disables Policy fields for the specified policy status, if the policy status code matches a code in the DisabledStatus section for the particular Policy, then the Policy fields will be disabled.</p> <p><b>Note:</b> When AutomaticPolicyNumber generator is not used, PolicyNumber field should be editable even after saving the policy that allows the entering and editing in that field until another policy event (calculating a coverage, Issue of the policy).</p>		

<b>&lt;DisabledStatus&gt;</b>	<b>Required element;</b> Indicates which applicable Status(es) would trigger the "lock down" of editable fields. This element defines policy status codes for which Policy fields will be disabled on Policy Screen.		<b>Required element value; PolicyStatusCode</b> Policy Status Code from AsCode=>AsCodeStatus
<b>&lt;SegmentCount&gt;</b>	<b>Optional element;</b> This element specifies the segment count which will be used only when policy status does not match a code in the DisabledStatus section for the particular policy. When Policy status does not match a code in the DisabledStatus section then Policy fields will be disabled.		<b>Optional element value;</b> _ * / + _ " * ": Disables Policy fields in all conditions. " + ": Disables Policy fields when Policy has at least a minimum of 1 segment in active status.
<b>&lt;AutomaticPolicyNumber&gt;</b>	<b>Optional element;</b> Allows generating Automatic Policy Number when a new policy is created as per the format specified in AutomaticPolicyNumber Business Rule.		<b>Optional element value; Yes/No/Optional</b> <b>Yes</b> - Allows generating Automatic Policy Number when new policy is created. <b>No</b> - When set to "No" Automatic Policy Number will not be generated when new policy is created and allows the user to enter the Policy Number in to the PolicyNumber field. <b>Optional</b> - Allows to either enter a valid policy number or have the system

			generate Policy number. If this element is not present default is "No".
<b>&lt;AutomaticPolicyName&gt;</b>	<b>Optional element;</b> Allows generating Automatic Policy Name when a new policy is created as per the format specified in AutomaticPolicyName Business Rule.		<b>Optional element value; Yes/No</b> <b>Yes</b> - Allows generating Automatic Policy Name when new policy is created. <b>No</b> - When set to "No" Automatic Policy Name will not be generated when new policy is created and allows the user to enter the Policy Name in to the PolicyName field. <b>Note:</b> If this element is not present default is "No".
<b>&lt;UseStateApproval&gt;</b>	<b>Optional element;</b> Defines whether or not state approval is enforced, controls the display of eligible States in IssueState drop down box.		<b>Optional element value; String: Yes/No</b> <b>Yes</b> - State Approval is enforced for this policy and only eligible states will be displayed in the Issue State drop down box. <b>No</b> - Not State Approved, all states will be displayed in the Issue State drop down box. If this element is not present default is "Yes".
<b>&lt;Roles&gt;</b>	Opening tag for defining roles on the policy.	<b>ALWAYSEQUALPERCENT</b>	<b>Optional attribute; Yes / No</b> <b>Yes:</b> Allows equal percent for even and odd number of roles for a Role Type upon clicking the EqualPercent check box. <b>No:</b> When set to "No" allows equal percent for even number of roles for a Role Type, RolePercent textboxes should be cleared for odd number of roles for a Role Type upon clicking the EqualPercent check box. If this attribute is not present default is "Yes" <b>Note:</b> If this attribute is not present default is "Yes"

			When Equal Percent check box is checked and the amounts aren't equal, the remaining amount is allocated to the last client
<b>&lt;Role&gt;</b>	<p><b>Required and repeatable element;</b> This element defines the description of the Role which will be added to the Policy. <b>Note:</b> A Role is a Policy driven position held by a person or entity.</p> <p>Roles can be attached to the Policy, when creating a new policy or attach to an existing Policy.</p> <p>Each Role tag will result in the addition of one or more clients to a specific role on a Policy. By having multiple &lt;Role&gt; tags, more than one role can be added to a Policy at the same time.</p>	<p><b>NAME</b></p> <p><b>DISABLEPOLICYST ATUS</b></p>	<p><b>Optional attribute; RoleName</b> A short description of the Name as per AsCodeRole.</p> <p><b>Optional Attribute; PolicyStatusCode</b> Code as defined in AsCode=&gt;AsCodeStatus. Disables the role for the specified policy status, the disabled role will not be displayed in the Maintain Roles drop down box and Role check box will be disabled on Maintain Role screen. <b>Note:</b> If this element is not present Role will be displayed in Maintain drop down box and Role check box will be enabled on Maintain Roles screen.</p>
<b>&lt;RoleCode&gt;</b>	<p><b>Required element;</b> Code values of a Role that is applicable to this plan.</p>		<p><b>Required element value; RoleCode</b> Role Code of the Role as per AsCodeRole.</p>
<b>&lt;RoleCount&gt;</b>	<p><b>Optional element;</b> Specifies number of times a Role can be assigned</p>		<p><b>Required element value; Integer</b> Allows the user to assign this type of Role only specified no of times to the</p>

	to Policy.		policy.
<b>&lt;RolePercent&gt;</b>	<b>Optional element;</b> Defines the default Role percent to be assigned to the role.		<b>Required element value; Integer</b> <b>0-100 percent is a valid value.</b> Allows the specified role percent will be assigned as default percent to the Role.
<b>&lt;ClientType&gt;</b>	<b>Optional element;</b> Define the Client Types that can be assigned to the Role. Only these Client types will be displayed in the Client Type dropdown box in ClientScreen, for the specific role. For example: An insured may need to be an Individual ClientType for a particular plan.		<b>Required element value; ClientTypeCode</b> Client Type code from AsCode table=>AsCodeClient.
<b>&lt;Tests&gt;</b>	<b>Optional Element;</b> Allows configuration of Test(s) condition. The evaluation of the condition decides whether the particular Role section can be executed or not.		
<b>&lt;Test&gt;</b>	<b>Required/Repeatable Element;</b> Expression used to determine if Role should be displayed/allowed for Policy.		<b>Expression;</b> Literal values can be used for the test condition.
<b>&lt;AllowZeroPercent&gt;</b>	<b>Optional element;</b> Allows Zero percent in Role percent fields.		<b>Required element value; Yes/No</b> <b>Yes:</b> Allows to enter zero percent to the Role percent field. <b>No:</b> When set to "No" then Zero Percent is not

			allowed. <b>Note:</b> If this element is not present default is "Yes".
<AllowNoPercent>	<b>Optional element;</b> Controls the display of Percent box next to the name of the Individuals that has been assigned to the specified role.		<b>Required element value; Yes/No</b> <b>Yes:</b> Percentage box will not be listed next to the name of the individuals that has been assigned to the specified role. <b>No:</b> When set to "No" Percentage box will be displayed next to name of the individual that has been assigned to the specified role. <b>Note:</b> If this tag is not present default is "No".

## PolicyScreen Image

Policy	Roles	Segments	Activities
<b>Company:</b> Acme Life <b>Plan Group:</b> Term Plan Group <b>Plan:</b> ACME Term <b>Entry Date:</b> 01/10/2006 <b>Search Name:</b> <b>Policy Status:</b> Pending			
<b>Issue State:</b> KY <b>Policy Number:</b> Term30009003			
<b>Policy</b>			
<b>Active Date:</b> <b>Issue Date:</b> 01/10/2006 <b>Delivery Receipt Date:</b> <b>Grace Period End Date:</b> <b>Unisex Issue:</b> <input type="checkbox"/> <b>Payment Mode:</b> Annual <b>Annual Premium:</b> <b>Next Year Annual Premium:</b> <b>Payment Draft Date:</b> <b>Paid To Date:</b> <b>Termination Date:</b>			
<b>App. Signed Date:</b> 01/10/2006 <b>Free Look End Date:</b> <b>Grace Amount:</b> <b>Policy Fee:</b> \$75.00 <b>Payment Method:</b> Direct Bill <b>Modal Premium:</b> <b>Next Year Modal Premium:</b> <b>Premium Available:</b> <b>Policy Year:</b> <b>Maturity Date:</b>			
<div> <div>New</div> <div>Save</div> <div>Close</div> </div>			



## Policy Screen Database Tables

Table Name	Description
AsClient	Holds names of people and corporations/companies that can fill various roles related to policies.
AsCode	Stores a list of all OIPA codes and their related descriptions
AsPolicy	Stores key data related to Policies
AsPolicyField	Stores Field names and values related to Policies
AsRole	Defines the roles that clients can play relative to a policy

## XML Example

```

<PolicyScreen>
  <!-- Term -->
  <CompanyTitle>Company</CompanyTitle>
  <PlanTitle>Plan</PlanTitle>
  <PlanDateTitle>Date Created</PlanDateTitle>
  <UseStateApproval>Yes</UseStateApproval>
  <FixedFields>
    <Field>
      <Name>PolicyName</Name>
      <Display>Work Item #</Display>
    </Field>
    <Field>
      <Name>Plan</Name>
      <Disabled>Exists</Disabled>
    </Field>
    <Field>
      <Name>PolicyStatus</Name>
      <Display>Contract Status</Display>
    </Field>
    <Field>
      <Name>PolicyNumber</Name>
    </Field>
  </FixedFields>
  <Fields>
    <Field>
      <Name>SortCompany</Name>
      <Display>Company</Display>
      <DataType>Combo</DataType>
      <Query TYPE="SQL">SELECT FundClassGUID, FundClassName FROM AsFundClass
ORDER BY 2 DESC</Query>
      <Disabled>Yes</Disabled>
    </Field>
    <Field>
      <Name>ActiveDate</Name>
      <Display>Date Activated</Display>
      <DataType>Date</DataType>
      <Disabled>Readonly</Disabled>
    </Field>
    <Field>
      <Name>Carrier</Name>
      <Display>Carrier Company Name</Display>
      <DataType>Combo</DataType>
      <Query TYPE="SQL">SELECT ClientGuid, CompanyName FROM AsClient WHERE
TypeCode = '19'</Query>
    </Field>
  </Fields>
  <OnLoad>
    <Field>cmbIssueState</Field>
  </OnLoad>
  <OnChange>
    <Change>
      <Name>cmbIssueState</Name>
      <Type>Compare</Type>
    </Change>
  </OnChange>

```

```

    <Expression>document.frmS3Policy.cmbIssueState[document.frmS3Policy.cmbIssueState.selectedInd...ex].t
    ext == 'MT'</Expression>
        <IfTrue>document.frmS3Policy.chkUnisexIndicator.checked = true</IfTrue>
        <IfFalse>document.frmS3Policy.chkUnisexIndicator.checked = false</IfFalse>
    </Change>
</OnChange>
<Buttons>
    <Button>Save</Button>
    <Button>New</Button>
    <Button>Close</Button>
</Buttons>
<Roles ALWAYSSEQUALPERCENT="No">
    <Role DISABLEBYPOLICYSTATUS="01,02,95">
        <RoleCode>01</RoleCode>
        <RoleCount>1</RoleCount>
        <RolePercent>100</RolePercent>
    </Role>
    <Role>
        <RoleCode>37</RoleCode>
        <RoleCount>1</RoleCount>
        <RolePercent>100</RolePercent>
    </Role>
</Roles>
<SegmentsAllowed>4</SegmentsAllowed>
<MinimumSegments>1</MinimumSegments>
<ShowSegmentRoles>Yes</ShowSegmentRoles>
<AutomaticPolicyNumber>Yes</AutomaticPolicyNumber>
<Validation>
    <Required>
        <Field>IssueDate</Field>
        <Field>AppSignDate</Field>
        <Field>Carrier</Field>
    </Required>
    <Expressions>
        <Expression MESSAGE="If Payment Method is Electronic Funds Transfer, the Payment Mode must be==
        3</Expression>
    </Expressions>
</Validation>
<DisablePolicyFields>
    <DisabledStatus>01,07,09,10,30,36</DisabledStatus>
    <SegmentCount>+</SegmentCount>
</DisablePolicyFields>
<UseStateApproval>Yes</UseStateApproval>
</PolicyScreen>

```

## 10. PolicySearchScreen

### Definition

This Business Rule allows configuration of the PolicySearchScreen and defines the fields to store the results of the search.

### PolicySearchScreen Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<PolicySearchScreen>	The opening and closing tags of the PolicySearchScreen Business		

	Rule.		
<b>&lt;AutoSearch&gt;</b>	<p>Defines if the user will be automatically redirected to the Polycyscreen if only one Result is returned from the search.</p> <p><b>Note:</b> If the element is present and does not have any value than will default to No.</p> <p>&lt;AutoSelect&gt; is Implemented in J2EE only.</p>		<p><b>Yes:</b> Automatically redirect the user to PolicyScreen</p> <p><b>No:</b> Go to the Policy Search Screen</p>
<b>&lt;Search&gt;</b>	<p><b>Required and Repeatable Element;</b></p> <p>Indicates and defines search criteria and the fields to be included as part of the Policy Search Screen activity.</p>		
<b>&lt;FixedFields&gt;</b>	Changes the labels on the "above the line" fixed fields.		
<b>&lt;Fields&gt;</b>	Dynamically changes labels on the "below the line" fields.		
<b>&lt;Table&gt;</b>	<p><b>Required</b></p> <p>The element that defines the screen as a table format and controls the display of results, formats results in a table.</p>		

## PolicySearchScreen Image

**Policy Search Criteria**

Company: (All Companies)

Plan Group: (All Plan Groups)

Plan: (All Plans)

Policy Number:

Tax ID:

Company:

Search Name:

Last Name:

First Name:

---

**Search Results**

Page 1 of 4      Page 1 2 3 4      Maximum Results: 10

Policy Number	Search Name	Status	Owner	Tax ID
ACME-IUL30010314		Pending		
ACME-IUL30010315	asj-replace	Active	Vaone, Howard	233-35-3243
asj-2592		Annuitized	Agent, Tim	888-88-8001
ASJ-2813		Annuitized	Agent, Tim	888-88-8001
asj-jraaas		Pending	Abb, Abb	999-99-9999
asj-test2		Ready To Annuitize	Vpone, Howard	888-88-8006
asj-2592		Annuitized	Agent, Tim	888-88-8001
asjlll		Pending		
AVA12345678		Pending	Abb, Abb	999-99-9999
AVA12345678		Pending	Abb, Abb	999-99-9999

## XMLExample:

```
<PolicySearchScreen>
  <Search>
    <FixedFields>
      <Field>
        <Name>Company</Name>
        <Display>Company</Display>
      </Field>
      <Field>
        <Name>Plan</Name>
        <Display>Plan</Display>
      </Field>
    </FixedFields>
    <Fields>
      <Field>
        <Name>PolicyNumber</Name>
        <Display>Policy Number</Display>
        <DataType>Text</DataType>
        <Group>Policy</Group>
        <InputFocus>Yes</InputFocus>
      </Field>
      <Field>
        <Name>LastName</Name>
        <Display>Annuitant Last Name</Display>
        <DataType>Text</DataType>
        <Group ROLECODE="27">Client</Group>
      </Field>
      <Field>
        <Name>FirstName</Name>
```

```

        <Display>Annuitant First Name</Display>
        <Group ROLECODE="27">Client</Group>
    </Field>
    <Field>
        <Name>AppSignDate</Name>
        <Display>Signed Date</Display>
        <DataType>Date</DataType>
        <Group>PolicyField</Group>
    </Field>
</Fields>
</Search>

<Results INITIALRESULTS="User" MAXRESULTS="250">
    <Table>
        <Column WIDTH="98" ALIGN="LEFT">
            <Display>PolicyNumber</Display>
            <Name>Policy Number</Name>
            <Group>Policy</Group>
        </Column>
        <Column WIDTH="200" ALIGN="LEFT">
            <Display>Policy Name</Display>
            <Name>PolicyName</Name>
            <Group>Policy</Group>
        </Column>
        <Column WIDTH="200" ALIGN="LEFT">
            <Display>Status</Display>
            <Name>StatusCode</Name>
            <Group>Policy</Group>
        </Column>
        <Column WIDTH="200" ALIGN="LEFT">
            <Display>Insured</Display>
            <Name>Name</Name>
            <Group ROLECODE="01">Client</Group>
        </Column>
        <Column WIDTH="80" ALIGN="LEFT">
            <Display>Tax ID</Display>
            <Name>TaxID</Name>
            <Group ROLECODE="01">Client</Group>
        </Column>
        <Column WIDTH="100" ALIGN="LEFT">
            <Display>Issue State</Display>
            <Name>StateCode</Name>
            <Group>Policy</Group>
        </Column>
        <Column WIDTH="100" ALIGN="LEFT">
            <Display>PlanDate</Display>
            <Name>PlanDate</Name>
            <Group>Policy</Group>
        </Column>
    </Table>
</Results>
</PolicySearchScreen>

```

## 11. PolicyTabView

### Description

This Business Rule provides information to define and name the Tab(s), and to indicate the Screen that is to be displayed.

**PolicyTabView Element\Attribute Table**

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<b>&lt;PolicyTabView&gt;</b>	The opening and closing tag of the PolicyTabView Business Rule.		
<b>&lt;SecurityRoles&gt;</b>	<b>Optional Element;</b> The opening and closing tag of the SecurityRoles.		
<b>&lt;SecurityRole&gt;</b>	<b>Optional Element;</b> Defines the security role for which the tabs should be displayed.	<b>NAME</b>	<b>Required attribute;</b> Name of the Security Role for which the Tab(s) will be displayed. <b>= "Name of the SecurityRole"</b> Allows for the display or restriction of display of Tabs based on the Security level of the user. If the user's security role is not specified, the default tabs will be used for the Tab display.
<b>&lt;Tabs&gt;</b>	<b>Required Element;</b> The opening and closing tag for the Tabs. This element tag is allowed within the SecurityRole and for a stand alone (default) series of Tab(s).		
<b>&lt;Tab&gt;</b>	<b>Required / Repeatable Element;</b> Used to define each Tab that are to be displayed. This element	<b>DISPLAY</b>	<b>Required Element value;</b> <b>ScreenFormName</b> Form Name of the Screen E.g.: For PolicyScreen, Form Name is S3Policy  <b>Required attribute;</b> Defines the description displayed in the

	tag is allowed within the SecurityRole and for a stand alone (default) series of Tab(s)	<b>SCREENNAME</b>	<p>Tab i.e.. This attribute is used to control the display name of the tab in the application. E.g.: &lt;Tab DISPLAY="Segments"&gt;S3Segment&lt;/Tab&gt;</p> <p><b>Optional attribute; Applicable only for Inquiry Screen</b> Clicking the Inquiry item in the top Menu bar, lists various Inquiry screens. This attribute is used to configure the display name of the specific Inquiry screen in the Inquiry menu dropdown <b>Note:</b> The difference between DISPLAY and SCREENNAME is that DISPLAY is used to configure the display name in the tab whereas SCREENNAME is used to configure the display name in the Menu listing. <b>Example:</b> &lt;Tab DISPLAY="Policy Values" SCREENNAME="Term Policy Values"&gt;AsInquiryScreen&lt;/Tab&gt;</p>
--	---	-------------------	---

## 12. PolicyValues

### Description

PolicyValues Business Rule is configured at the Plan Level. This Business Rule is used with ValuesScreen Business Rule to display the Value of the Policy on the Values screen (Values Screen can be invoked by clicking the Values button on the Policy Screen). PolicyValues Business Rule specifies the math variables that are to be used for, calculating the Policy Value and display the resulting Values on the Values screen, whereas ValuesScreen Business Rule specifies, how to display the value - format such as Currency, Text etc... on the Values screen. PolicyValues Business Rule is invoked by processing the Transaction that contains the <Valuation> element. When the PolicyValues Business Rule is not attached to a Transaction, the system will not run any Policy Values calculation and hence <PolicyValues> tag within the ValuationXML will be empty. As a result, Policy values section on Values screen will be blank. Within the Transaction XML, by using the POLICYVALUES attribute, the User can specify whether or not the PolicyValues Business Rule should be invoked and set it to either Yes or No depending on the need.

- When the attribute is set to Yes, Policy Values will be calculated.
- When the attribute is set to No, calculation of Policy Values will be turned off.
- When no attribute is present, it's treated as if the POLICYVALUES is set to Yes and hence the Policy Values will be calculated.

### PolicyValues Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<PolicyValues>	The opening and closing tag of the PolicyValues Business Rule.		
<MathVariables>	<b>Optional element;</b> Opening tag for defining math variables.		
<MathVariable>	<b>Required Element;</b> Defines the description of the math variables. These math variables are used to calculate and display the Policy Values in the PolicyValues section of the Values Screen. This Business Rule supports all <MathVariable> properties supported by Transaction		



## 13. PostAssignmentProcessing

### PostAssignmentValidation Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Data Type
< PostAssignmentProcessing> </PostAssignmentProcessing>	Required element indicating the opening and closing of PostAssignmentProcessing activity.
<Assignment>	
<Collapse>	MONEYTYPECODE Defines the money type code '01' '02' etc
<Post>	Defines the opening and closing <Post> tag

### Database Tables

Name	Definition
ASBENEFITSPLITCHANGE	Links to the 05 BenefitSplit records and describes the change performed to arrive at their resulting values.

ASBENFITSPLITCHANGE EXAMPLE	
Name	Comment
BenefitSplitChangeGUID	Primary key
BenefitSplitGroupGUID	Foreign Key connecting the change to its benefit split parent
FundGUID	Foreign Key connection the change to its fund
MoneyTypeCode	Specifies the specific type of money movement which occurred
BenefitPercent	Defines the change in benefit percent
BenefitAmount	Defines the change in benefit amount
BenefitUnits	Defines the change in benefit units

### XML Example

```

<AssignmentProcessing>
  <Post>
    <BenefitSplit PROCESS="DoBenefitSplitTransfer" REDEMPTIONMONEYTYPE="33">
      <WriteBenefitChange>Yes</WriteBenefitChange>
      <SegmentGUID>SegmentGUID</SegmentGUID>
      <AIR>FormattedFundAIR</AIR>
    </BenefitSplit>
  </Post>
</AssignmentProcessing>

```

## 14. PostAssignmentValidation

### Description

A new business rule titled PostAssignmentValidation is introduced. This new rule defines the validation of Post Assignment Math values after the final math calculation run. Post assignment validation includes screen functionality to identify errors, fix and allow overrides.

**PostAssignmentValidation Element\Attribute Table**

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<b>&lt;PostAssignmentValidation&gt;</b>	The opening and closing tag of the PostAssignmentValidation Business Rule tag. The PostAssignmentValidation tag defines the error messages and the conditions for validation default.		
<b>&lt;Expression&gt;</b>	Indicates validation error messages including required attributes and values for error conditions.	<b>TYPE</b>  <b>OVERRIDABLE</b>  <b>ERRORNUMBER</b>	Defines the field and condition for validation default.  "ErrorOnTrue" - Text  <b>Yes</b> - Indicates override at the validation level - Text <b>No</b> - Indicates the field value to define error message activity.  D09 - Code value for error message GO03 - Code value for error message GO12 - Code value for error message
	Error Message Code Value defines message text as displayed on screen.	<b>MESSAGE</b>	String Validation field edits associated with error code.  D09 - "Future Allocation Change Effective Date cannot be before the Issue Date". StatusCheck < 0  GO03 - "Financial Restrictions are in effect on this contract. This transaction cannot be processed." Financial Restriction 01 02.

			D09 - "AAB Exists on this Contract. A Guaranteed Account is not allowed with AAB. Please adjust allocations." AABExists > 0 And GuaranteedFundCount > 0
--	--	--	---

## Database Tables for

n/a

## XML Example

```

PostAssignmentValidation>
  <Expression TYPE="ErrorOnTrue" OVERRIDABLE="No" ERRORNUMBER="D009" MESSAGE="Future
Allocation Change Effective Date can not be before the Issue Date">StatusCheck &lt; 0</Expression>
  <Expression TYPE="ErrorOnTrue" OVERRIDABLE="No" ERRORNUMBER="G003" MESSAGE="Financial
Restrictions are in effect on this contract. This transaction cannot be processed">FinancialRestriction=01 Or
FinancialRestriction=02</Expression>
  <Expression TYPE="ErrorOnTrue" OVERRIDABLE="No" ERRORNUMBER="G012" MESSAGE="AAB Exists
on this Contract. A Guaranteed Account is not allowed with AAB. Please adjust allocations.">AABExists &gt; 0 And
GuaranteedFundCount &gt; 0</Expression>
</PostAssignmentValidation>

```

## 15. PrecisionValues

### Description

This Business Rule allows configuration of the PrecisionValues Business Rule.

### PrecisionValues Element \ Attribute Table

Element\Tag	Attribute\Definition\Value\Data Type	
<PrecisionValues> </PrecisionValues>	Required parent element that indicates the opening and closing of the PrecisionValues business rule.	
<PrecisionValue>	TYPE	Precision value type
<Precision>	TYPE	Precision type
	METHOD	Precision method

## 16. Premium

### Description

This Business Rule allows configuration of the Premium Business Rule.

### Premium Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options	
<Premium> </Premium>	The opening and closing elements of the Premium business rule.	
<Modify>	A valid SQL statement	
<Add>	MONEYTYPE	

<Remove>	GROUPTOGETHER	Yes or No
	PREMIUMTYPECODE	
	MONEYTYPE	
	PREMIUMTYPECODE	
<Rates>	PREMIUMMONEYTYPE	
	TYPECODE	
	TYPE	
<Rate>	MONEYTYPE	
<RateDescription>	TYPE	
<FullSurrender>	FREEAMOUNT	

## 17. ProcessReinsuranceExcess

### Description

This Business Rule allows configuration of the ProcessReinsuranceExcess Business Rule.

### ProcessReinsuranceExcess Element \ Attribute Table

Element\Tag	Attribute\Definition\Value\Data Type	
<ProcessReinsuranceExcess> </ProcessReinsuranceExcess>	Required parent element that indicates the opening and closing of this business rule.	
<Client>	CLIENTGUID	
	POLICYROLECODE	
	TOTALNAR	
<LayerTotalFields>		
<Layer>	INDEX	
<StartDate>		
<EndDate>		
<Math>		
<MathVariables>		
<RetentionLimit>		
<Layers>		
<LayerLimits>		
<LayerPercents>		
<GenerateActivities>		
<GenerateActivity>		
<Transaction>		

## 18. QuoteScreen

### Description

This business rule defines the layout of the QuoteScreen (a.k.a Verification Screen) which provides the ability to view an Activity Quote screen prior to actually saving the Activity to the database. The Quote Screen displays a multitude of information after clicking on the "OK" button from the Activity Details screen. A Confirmation Screen displays prior to processing the transaction request. A Transaction rule must be configured prior to configuring the Quote Screen business rule.

### QuoteScreen Element \ Attribute Table

Element\Tag	Attribute\Definition\Value\Data Type		
<QuoteScreen> </QuoteScreen>	Required element indicating the opening and closing of the Quote screen.		
<Quote>	Sub element defining the type and name of the Quote screen to be displayed.		
	TYPE	Defines the type of quote	String
	TITLE	Defines the name that will display in the heading, spaces are allowed in the naming convention	
<DisableProcessButton>	(Optional) Allows Process button to be disabled if any overridden, non-overridden, or specified non-overridable, errors are present in Quote/Verification.		ALLERROS
	YES	Process button will be disabled if any overridable non-overridden, or any non-overridable, errors are present in Quote/Verification.	String
	NO	Otherwise only non-overridable errors specified in sub-elements, or any overridable non-overridden errors, will cause the button to be disabled.	
<ErrorNumbers>	(Optional) Specifies a specific error number that if present and non-overridable will cause the Process button to be disabled.		String
	IGNORECASE (optional)	YES	If set to 'Yes', matches will be case-insensitive.
		NO	Otherwise matches will be case-sensitive.
<ErrorNumberStartsWith>	(Optional) Defines an error number prefix. If the prefix matches any error numbers present that are non-overridable, the Process button will be disabled.		String
	IGNORECASE (optional)	YES	If set to 'Yes', matches will be case-insensitive.
		NO	Otherwise matches will be case-sensitive.
<ErrorNumberEndsWith>	(Optional) Defines an error number suffix. If the suffix matches any error numbers present that are non-overridable, the Process button will be disabled.		String

	IGNORECASE (optional)	YES	If set to 'Yes', matches will be case-insensitive.
		NO	Otherwise matches will be case-sensitive.
<ErrorNumberContains>	(Optional) Defines an error number sub-string. If the sub-string matches any error numbers present that are non-overridable, the Process button will be disabled.		String
	IGNORECASE (optional)	YES	If set to 'Yes', matches will be case-insensitive.
		NO	Otherwise matches will be case-sensitive.
<Labels>	This element indicates an input control that will accept input from the user or system.		String
<Label>	TITLE		A label tag.
	FORMAT		
<Allocations>	Element used to indicate if Allocations are to be displayed.		
	YES	When set to "Yes", indicates that Allocation information is available for execution.	
	NO	When set to "No", indicates there is no Allocation information is available for execution.	
<Buttons>	Defines the command buttons to be displayed on the Quote screen. The buttons are displayed on the Quote screen in the order they are configured.		
<Warnings>	YES	Warnings are displayed	
	NO	Warnings are not displayed	
<Errors>	Element indicating the opening of the Errors section of the Quote Screen used to display any transaction violation errors that occur during processing when attribute is set to "Yes".		

## QuoteScreen Image

Partial Surrender Verification

**Script:** The following withdrawal transaction is about to take place on 03/21/2003 for a total of 10000 dollars. Your confirmation number is [Variable value not found].

**Surrender Amount:** \$10,000.00      **Federal Withholding Percent:** 5%

**State Withholding Percent:** 4%

Process Close

Errors

Number	Error	Fix	Override
U001	Partial Surrender request has been rejected		<input type="checkbox"/>

Warnings

Number	Error	Fix
--------	-------	-----

## XML Example

```
<QuoteScreen>
<Quote TYPE="Rule" TITLE="Partial Surrender Quote Screen">
  <DisableProcessButton ALLERRORS="No">
    <ErrorNumberIs>LH001</ErrorNumberIs>
    <ErrorNumberStartsWith IGNORECASE="Yes">M</ErrorNumberStartsWith>
    <ErrorNumberEndsWith>33</ErrorNumberEndsWith>
    <ErrorNumberContains>02</ErrorNumberContains>
  </DisableProcessButton>
  <Labels>
    <Label TITLE="Script" FORMAT="Sentence">The following withdrawal transaction is about to take
number is      place on $$$Activity:EffectiveDate$$$ for a total of $$$SurrenderAmount$$$ dollars. Your confirmation
    $$$Activity:ActivityGUID$$$</Label>
    <Label TITLE="Surrender Amount" FORMAT="Currency" ALIGN="LEFT">SurrenderAmount</Label>
    <Label TITLE="Federal Withholding Percent"
FORMAT="Percent">TransactionFederalWHPercent</Label>
    <Label TITLE="State Withholding Percent"FORMAT="Percent">TransactionStateWHPercent</Label>
  </Labels>
  <Allocations>No</Allocations>
  <Buttons>
    <Button>Process</Button>
    <Button>Close</Button>
  </Buttons>
  <Warnings>Yes</Warnings>
  <Errors>Yes</Errors>
</Quote>
</QuoteScreen>
```

## 19. RateGroupScreen

### RateGroupScreen Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options
<RateGroupScreen> </RateGroupScreen>	The opening and closing tag of the RateGroupScreen Business Rule
<RateGroup>	ALLOW Yes/No

## 20. ReassignAllocations

### Description

ReassignAllocations BR is used to instruct the system what Funds to use in conjunction with Assignment. This can be used to apply all money into a defined fund. This is useful when the selection of allocation by the enduser should be restricted. An allocation record is created when this BR is processed. The Allocation record contains the fund the money is moving into. This Business Rule can also be used to pull all money from a specified fund into another fund.

### Note:

- This should be used in lieu of configuring any Allocation elements. Even if allocations tags are configured and selected in an Activity, the attached ReassignAllocation Business

Rules configuration takes

precedence and applies money according to the Business Rule.

- The Assignment Type when using ReassignAllocations should be a type that moves an entire amount of money like Apply or FullWithdrawal. An assignment type like ApplyByFund is expecting fund allocations ie. ReassignAllocations BR is for use with a 'generic' Assignment Type such as Apply or FullWithdrawal, not for use with ApplyByFund.
- ReassignAllocations writes to AsAllocation at the activity processing level and will overwrite the presence of the Allocation element and any previous allocation records and writes the new records at the point the activity is saved.
- Used with Transactions like FullSurrender, AutoTransfer(where the money is moved from one Fund to another), InitialPremium etc

### ReassignAllocations Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<ReassignAllocations>	The opening and closing tag of the ReassignAllocations Business Rule.		
<From>	<p><b>Optional element;</b>  <b>SQL</b> - A SQL statement that locates money that is to be moved from a Fund is entered in the &lt;From&gt; tag.</p> <p><b>Note:</b> The amount passed in the &lt;From&gt; tag should be positive which is converted to negative in the Code</p> <p>This tag is not always necessary as the money is not always moving from a fund. For example, in a Initial Premium transaction the premium amount is only moving to a fund. It was never established in a fund to be moved from, prior to this transaction.</p>	PRORATA	<p><b>Required element value;</b>  <b>SQL</b>  Query to locate the Fund from which the money should be moved-from</p> <p><b>Optional attribute;</b>  <b>Yes/No</b>  Used to describe a proportionate allocation. A method of assigning an amount to a fraction, according to its share of the whole. Used in Transactions like FullSurrender  <b>Yes</b> - the allocations after the ReassignAllocations is executed divides the percents according to the funds in the allocation list based upon their cash positions. Funds that are not in the allocation list should not be counted as part of the total value nor should they be inserted into the allocation list.</p>



			<b>No</b> - Allocations will not be prorated
<b>&lt;To&gt;</b>	<p><b>Optional element;</b> This element is used to indicate the To fund to which the money should be moved-into</p> <p><b>Note:</b> Used in Transactions like FullSurrender, AutoTransfer and InitialPremium</p>	<b>PRORATA</b>	<p><b>Required element value; SQL</b> Query to locate the Fund to which the money should be moved-into is entered in the &lt;To&gt; tag</p> <p><b>Optional attribute; Yes/No</b> Used to describe a proportionate allocation. A method of assigning an amount to a fraction, according to its share of the whole. Used in Transactions like FullSurrender <b>Yes</b> - the allocations after the ReassignAllocations is executed divides the percents according to the funds in the allocation list based upon their cash positions. Funds that are not in the allocation list should not be counted as part of the total value nor should they be inserted into the allocation list. <b>No</b> - Allocations will not be prorated</p>

## 21. ReassignBenefitSplit

ReassignBenefitSplit Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<b>&lt;ReassignBenefitSplit&gt;</b>	The opening and closing tag of the ReassignBenefitSplit Business Rule.		
<b>&lt;From&gt;</b>	Specifies the BenefitSplit TypeCode of the current allocation.		<b>String</b> Generally "05" is the TypeCode that is used here.
<b>&lt;To&gt;</b>	Specifies the BenefitSplit TypeCode of the orginal allocation.		<b>String</b> Generally, "51" is the TypeCode that is used.

## 22. RemoveFromClientGroup

### RemoveFromClientGroup Element \ Attribute Table

Element\Tag	Attribute\Definition\Value\Data Type	
<RemoveFromClientGroup> </RemoveFromClientGroup>	Required parent element that indicates the opening and closing of the RemoveFromClientGroup business rule.	
<Policy>	TYPE	Text. FIELD/STRINGARRAY/COLLECTION
<Fields>	Start of section listing Field columns and fields	
<Field>	Start of column/field definition block	
<From>	Value to place in that column/field, substituting for the source column/field value	
<To>	Name of the column/field	

## 23. ReportFile

### Description

ReportFile Business Rule gives the ability for a transaction to have a document attached. Once a document is chosen for the Transaction override, the system generates a NaturalFile GUID. This is done at the transaction override level.

### ReportFile Element \ Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<NaturalFile>	<b>Required Element;</b> Identifies the GUID that is going to be with in these tags. This GUID is created when a file/document is attached to the rule. <b>Note:</b> Each transaction will have it's own GUID for the file. This rule does not have the rule name for it's opening/closing tags.		

## 24. ReportFileTypes

### Description

This Business Rule allows configuration of the ReportFileTypes Business Rule.

### ReportFileTypes Element \ Attribute Table

Element\Tag	Attribute\Definition\Value\Data Type
<ReportFileTypes>	Required parent element that indicates the opening and closing of the

</ReportFileTypes>	ReportFileTypes business rule.
<FileType>	

## 25. RequirementsScreen

### Description

RequirementScreen works together with GeneratePendingRequirement and DeliveryRequirement business rules.

GeneratePendingRequirement is used to define the list of requirements that needs to be satisfied prior to processing certain activities. And DeliveryRequirement specifies the dates that needs to be mandatorily updated for these requirements (These dates are Date Received, Date Waived, Date Requested and Date Due ). These two rules should be attached to the Transaction along with the Transaction Business Rule Packet, and Transaction Cosmetics Business Rule to generate the Requirements at the activity level. Requirement screen contains two parts. The First part is used to display the required documents needed for that Policy (what documents are required is defined in the GeneratePendingRequirement business rule) and the second part is used to display the dates (The dates that needs to be mandatorily updated are specified in DeliveryRequirement business rule).

RequirementScreen business rule is used to configure the applicable Fixed fields for this screen, set up the Category, enable or disable the date fields after saving the requirements and perform some validation.

### ReverseScreen Element \ Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<RequirementsScreen>	The opening and closing tags of the RequirementsScreen Business Rule.		
<FixedFields>	<b>Optional Element;</b> Allows configuration of 'above the line' fields.		
<Categories>	<b>Optional Element;</b> Allows configuration of categories from AsLinkrequirement table. Normally Requirements Screen loads all requirements from the		

	<p>AsLinkRequirement Table. This tag is used to control/filter the Requirements to be displayed on the Requirements Screen. When this tag is present in this rule then the Requirements screen will load the dropdown filtered by the Category list.</p> <p><b>Note:</b> A column called CategoryCode should be present in the AsLinkRequirement table. The corresponding description for that category will be maintained in AsCode Table named as AsCodeRequirementCategory.</p>		
<Category>	<p><b>Required / Repeatable Element;</b> This element is used to specify the Requirement Category.</p>		<p><b>Required Element Value;</b> <b><u>RequirementCategoryCode</u></b> <b>e</b> A valid CategoryCode from the AsLinkRequirement data base table. These codes are defined in AsCode =&gt; AsCodeRequirementCategory table <b>Example:</b> &lt;Category&gt;01&lt;/Category&gt;</p>
<Validation>	<p><b>Optional Element;</b> Allows configuration of edits and validations. Refer to the Transaction Configuration section of the Technical Manual for &lt;Validation&gt; element details and available options.</p>		

## XML Example

```

<RequirementsScreen>
  <FixedFields>
    <Field>
      <Name>RequestedDate</Name>
      <Display> Yes </Display>
      <Disabled>No</Disabled>
      <Hidden>No</Hidden>
    </Field>
  
```

```

        <Field>
            <Name>ReceivedDate</Name>
            <Display> Yes </Display>
            <Disabled>Yes</Disabled>
            <Hidden>No</Hidden>
        </Field>
        <Field>
            <Name>WaivedDate</Name>
            <Display> No </Display>
            <Disabled>Yes</Disabled>
            <Hidden>No</Hidden>
        </Field>
        <Field>
            <Name>DueDate</Name>
            <Display> Yes </Display>
            <Disabled>No</Disabled>
            <Hidden>No</Hidden>
        </Field>
    </FixedFields>
    <Categories>
        <Category > 01 </Category>
        <Category > 02 </Category>
    </Categories>
    <Validation>
        <Expressions>
            <Expression MESSAGE="Date Requested Missing">document. frmAsRequirement.txtRequestedDate.value!= "
            </Expression>
            <Expression MESSAGE="Received Date must be less than or equal to Requested Date">new
            Date(document.frmAsRequirement.txtRequirementReceivedDate.value) &lt;= new Date (document.
            frmAsRequirement.txtRequestedDate.value)</Expression>
            <Expression MESSAGE="Delivery Date must be greater than or equal to Activation Date">new
            Date(document.frmAsActivityDetail.txtPolDeliveryDate.value) &gt;= new Date
            (document.frmAsActivityDetail.txtEffectiveDate.value)</Expression>
        </Expressions>
    </Validation>
</RequirementsScreen>

```

## 26. ReverseScreen

### Description

This Business Rule allows configuration of the Reverse screen.

### ReverseScreen Element \ Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<b>&lt;ReverseScreen&gt;</b>	The opening and closing tag of the ReverseScreen Business Rule.		
<b>&lt;Fields&gt;</b>	Allows configuration of dynamic fields. Press <Fields> link for additional information on the <Fields> Element configuration.		
<b>&lt;Validation&gt;</b>	Allows configuration of edits and validations. Press <Validation> link for additional information on the		

	<Validation> Element configuration.		
--	-------------------------------------	--	--

## XML Example

```

<ReverseScreen>
  <Fields>
    <Field>
      <Name>GainLossReason</Name>
      <Display>Gain Loss Reason</Display>
      <DataType>Combo</DataType>
      <Query TYPE="SQL">SELECT CodeValue, ShortDescription FROM AsCode
AsCodeException
      WHERE AsCodeException.CodeName = 'AsCodeException' ORDER BY...</Query>
      <DefaultValue>00</DefaultValue>
    </Field>
    <Field>
      <Name>GainLossArea</Name>
      <Display>Gain Loss Area</Display>
      <DataType>Combo</DataType>
      <Query TYPE="SQL">SELECT CodeValue, ShortDescription FROM AsCode
AsCodeExceptionArea WHERE
      AsCodeExceptionArea.CodeName = 'AsCodeExceptionArea' ORDER BY
      ShortDescription</Query>
      <DefaultValue>00</DefaultValue>
    </Field>
  </Fields>
  <Validation>
    <Expressions>
      <Expression MESSAGE="G-L Reason must be
present">document.frmAsReverseDetail.cmbGainLossReason.value != '00'</Expression>
      <Expression MESSAGE="Gain-Loss Area must be
present">document.frmAsReverseDetail.cmbGainLossArea.value != '00'</Expression>
    </Expressions>
  </Validation>
</ReverseScreen>

```

## 27. RoleScreen

### Description

This Business Rule allows configuration of the RoleScreen and defines the dynamic fields that can be displayed and updated on the specified Role Detail(s) screens. The Plan selected during the Policy entry process dictates which Role options are visible and available on the RoleScreen.

### RoleScreen Element \ Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<RoleScreen>	The opening and closing tag of the RoleScreen Business Rule.		
<Role>	<b>Required/Repeatable Element;</b>	<b>ROLECODE</b>	<b>Required Attribute; RoleCode</b>

	Parent element that has sub elements to hold required information or have available information for a specific role that is defined separately by this tag.		To represent the Role Code (as defined in AsCodeRole) for which the information should be captured or made available for each RoleCode.
<Fields>	Allows configuration of dynamic fields. Press <Fields> link for additional information on the <Fields> Element configuration.		
<SucessorOnDelete>	<b>Optional element;</b> This element is to allow the system to replace one role with another upon deleting the original role.	<p><b>DELETEOLDROLE</b></p> <p><b>IGNOREONSTATUS</b></p>	<p><b>Required element value; RoleCode</b> This is the role with which the original role should be replaced with, upon its deletion <b>Note:</b> The original role's RoleCode is specified in &lt;Role&gt; tag.</p> <p>If the new role does not exist, then the User is warned with the same.</p> <p><b>Optional attribute; Yes/No</b> <b>Yes</b> - Deletes the old role from the Policy upon replacing it with the new role. <b>No</b> - Keeps the original role along with the new role on the policy.</p> <p><b>Optional attribute; StatusCode</b> To indicate that if the Policy is in one of the specified statuses, no action will be taken. The StatusCode is taken from AsCode=&gt;AsCodeStatus</p>

			table.
<b>&lt;Validation&gt;</b>	Allows configuration of edits and validations.		
<b>&lt;Required&gt;</b>	This tag lists fields that MUST have values entered in them. The validation process is performed on these fields.		
<b>&lt;Expressions&gt;</b>	<b>Optional Element;</b> This tag encompasses the list of the error messages that should be displayed on the screen when a specific Condition is evaluated to be True/ False. Language/Code used is JavaScript. Indicates validation error messages including required attributes and values for error conditions. In general Expression JavaScript syntax contains three distinct parts: 1. the form name (i.e., the screen name). 2. the name of the field. 3. the function.		
<b>&lt;Expression&gt;</b>	<b>Required / Repeatable Element;</b> This tag specifies the error messages to be displayed on the screen when a specific Condition is evaluated to be True/ False.		<b>Required Element value; Expression</b> Specifies the condition that needs to be evaluated upon trying to process the Transaction. This is useful as it validates the input values to make sure that they are



		<p><b>TYPE</b></p> <p>acceptable before they are submitted to the server.  <b>Note:</b> Java script language is used to write a condition referencing fields and screen names.</p>
		<p><b>OPTIONAL ATTRIBUTE; ERRORONTRUE/ERRORONFALSE</b></p> <p>Tells the math engine to error if the expression is evaluated to True or False.  <b>ErrorOnTrue</b> - If the Expression is true then displays the error message.  <b>ErrorOnFalse</b> - If the Expression is false then displays the error message.  <b>Note:</b> ErrorOnFalse is a default value if TYPE="ErrorOnTrue" is not specified.</p>
		<p><b>MESSAGE</b></p> <p><b>OPTIONAL ATTRIBUTE; AUTO/YES/SECURITYROLE</b></p> <p>This attribute is used to indicate whether the error messages can be overridden or not  <b>Auto</b> - Defines the ability to automatically override the error  <b>Yes</b> - When set to "Yes", the error messages will be displayed with a check box in the Error window. Clicking the checkbox will allow the User to override the error.  <b>SecurityRole</b> - This attribute value is used to indicate the error message can only be overridden by someone</p>

			<p>with a specified security role. The security Role name from the AsSecurityRole database table can be used to specify the security role as comma separated list.  <b>E.g.:</b>          OVERRIDEABLE="Yes, SecurityRole1, SecurityRole2, SecurityRole3"  <b>No</b> - If set to "No" errors can not be overridden.</p> <p><b>Required Attribute;</b>  <b>= "ErrorMessage"</b>          This attribute is used to specify the error message that should be displayed upon evaluating the condition.</p>
<b>&lt;OnLoad&gt;</b>	<p><b>Optional Element;</b>          Indicates the start of field definition and values applying to math calculation to enable this functionality.          Refer to the OnLoad and OnChange sections of the Transaction Configuration section in the Technical Manual.          This contains further information about the available options for these elements.  <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>	<b>Optional Element;</b>		

	<p>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>		
<Functions>	<p><b>Optional element;</b> This section is used to obtain the roles (by RoleCode) that have associated Client data outside the OIPA database. This information can be accessed via a web service, defined in the WebServices rule. The link to the external entity is stored in the OIPA database in the AsRoleField table. The ClientGUID column in the related record in AsRole points ( in all instances), to a placeholder record in AsClient with the name "External Client".</p>		

<b>&lt;Function&gt;</b>	<b>Required / Repeatable Element;</b> This tag begins the definition of the role's relationship to a single function and it encompasses the list of subelements that provides access to the external client data		
<b>&lt;Category&gt;</b>	<b>Required element;</b> This element defines the Category under which this function falls. The Functions are organized by Category so that the system can determine what specific information is being requested by the application. <b>Note:</b> Each role may only have a single instance of each category.		<b>Required Element value;</b> <b>CategoryName</b> <b>Eg:</b> Validate, Search, FieldSearch, Sync_AddressChange, Sync_ClientDetailChange .
<b>&lt;Type&gt;</b>	<b>Required element;</b> Each role listed has a Type element that specifies the type of external interface.		<b>Required;</b> <b>WebService</b> <b>Note:</b> WebService is the only valid value in OIPA.
<b>&lt;RuleName&gt;</b>	<b>Required element;</b> The RuleName refers to the business rule that defines information specific to this function.		<b>Required;</b> <b>WebServicesBR</b> Name of the rule the function is using to perform <b>Note:</b> The business rule that is used to access the external interfaces is "WebServices" in OIPA.
<b>&lt;Name&gt;</b>	<b>Required element;</b> The Name element refers to the specific function that the call to the external data will perform.		<b>Required Element Value;</b> <b>WebServiceName</b> Name of the WebService that is defined inside the business rule referenced

			in the RuleName tag. <b>Example:</b> Sync_ClientDetailChange , Sync_AddressChange etc
>	<ExternalKeys	<b>Required element;</b> Indicates the beginning of the list of key fields required by the operation.	
y>	<ExternalKe	<b>Required / Repeateable element;</b> This element is used to hold the name of a role field that will be used to uniquely identify a single entity in the external system.	<b>Required; RoleField Name</b> Name of the Role Field that is used as the Key Field by the Function. These external keys are fields in the RoleScreen and from the client's database.

## RoleScreen Image

Role Detail(s)

Over Ride Address: N/A  
Relationship To Insured: [dropdown]

Federal Withholding Percent: 0.0  
State Withholding Percent: 0.0  
Federal Withholding Amount: \$0.00  
State Withholding Amount: \$0.00

Tax Certification Code: W9 On File  
Tax Withholding Flag: No Exceptions  
Tax Certification Date: [calendar icon]

Suppress Correspondence: ☒ No ☐ Yes  
Suppress Statements: ☒ No ☐ Yes  
Suppress Confirmations: ☒ No ☐ Yes

Send Duplicate Correspondence to: N/A  
Send Duplicate Confirmations To: N/A  
Send Duplicate Statements To: N/A

Correspondence To Alternate Address: N/A  
Statements To Alternate Address: N/A  
Confirmations To Alternate Address: N/A

OK Cancel

## Database Tables for RoleScreen

Table Name	Description
AsAddress	Stores Client address information
AsAddressField	Contains address information organized by guaranteed user identification
AsAddressRole	Contains address information organized by the role
AsClient	Stores personal information about Clients
AsCode	Contains a listing and description of all valid codes and their values
AsRole	Contains role information

## XML Example

```

<RoleScreen>
  <Role ROLECODE="13">
    <Fields>
      <Field>
        <Name>OverRideAddress1</Name>
        <Display>Override Address</Display>
        <DataType>Combo</DataType>
        <Query TYPE="SQL">SELECT .... </Query>
      </Field>
      <Field>
        <Name>Line</Name>
        <Display></Display>
        <DataType>Line</DataType>
      </Field>
      <Field>
        <Name>Line</Name>
        <Display></Display>
        <DataType>Line</DataType>
      </Field>
      <Field>
        <Name>AlternateCorrespondence</Name>
        <Display>Correspondence to Alternate Address</Display>
        <DataType>Text</DataType>
      </Field>
      <Field>
        <Name>AlternateConfirmation</Name>
        <Display>Confirmations to Alternate Address</Display>
        <DataType>Text</DataType>
      </Field>
      <Field>
        <Name>AlternateStatements</Name>
        <Display>Statements to Alternate Address</Display>
        <DataType>Text</DataType>
      </Field>
    </Fields>
  </Role>
</RoleScreen>

```

## 28. RolesExist

### Description

This business rule is used to primarily validate whether the specified role codes exist on the policy or not. Apart from that, this Business Rule is also used to verify whether certain fields are empty or not and process the validations for the specified roles.

## RolesExist Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description	Additional Information
<b>&lt;RolesExist&gt;</b>	The opening and closing tag of the RolesExist Business Rule.			This BR is generally attached to the below Transactions: AdditionalPayment, AddPay, AddPayAAB, Annuitization, AnnuityPayment, AnnuityPaymentDueUnpaid, AutoPay, Commission, CoverageCalculation, Disbursement, DisbursementDueUnpaid, Issue, PolicyApproval, Withdrawal. Processing these transactions performs the validations on this Business Rule.
<b>&lt;Role&gt;</b>	<b>Required element;</b> Opening tag of the Role section.			
<b>&lt;RoleCode&gt;</b>	<b>Required element;</b> Defines the role codes to verify if these role codes exists on the policy.		<b>Required Value; Code:</b> RoleCode(As defined in AsCode table=>AsCodeRole).	
<b>&lt;FieldsExist&gt;</b>	<b>Optional element;</b> <FieldsExist> tag is used to ensure that certain required fields are filled in, at the time of running the transaction.			
<b>&lt;Field&gt;</b>	<b>Required</b>		<b>Required value;</b>	

	<p><b>element;</b> Defines the field to verify if the field value exist on the client screen of the client which is assigned to the specified role code.</p>	<p><b>GROUP</b></p> <p><b>DISPLAY</b></p>	<p><b>String:</b> Field name on the Client Screen.</p> <p><b>Required attribute;</b> <b>String:</b> Client, Role. Indicates the Table/Screen that stores the field being referenced.</p> <p><b>Required attribute;</b> <b>String:</b> Display name of the field.</p>	
<p><b>&lt;FieldsDoNotExist&gt;</b></p>	<p><b>Optional element;</b> &lt;FieldsDoNotExist&gt; tag is used to ensure that certain required fields are empty, at the time of running the transaction</p>			
<p><b>&lt;Field&gt;</b></p>	<p><b>Required element;</b> Defines the field to verify if the field value does not exist on the client screen of the client which is assigned to the specified role code</p>	<p><b>GROUP</b></p> <p><b>DISPLAY</b></p>	<p><b>Required Value;</b> <b>String:</b> Field name on the Client Screen.</p> <p><b>Required attribute;</b> <b>String:</b> Client, Role. Indicates the Table/Screen that stores the field being referenced.</p> <p><b>Required Attribute;</b> <b>String:</b> Display</p>	



			name of the field.	
<b>&lt;InterRoleRules&gt;</b>	<b>&lt;InterRoleRules&gt;</b> > is used to apply certain rules on the usage of roles on a Policy.			
<b>&lt;MustBeDifferent&gt;</b>	<b>Required element;</b> <MustBeDifferent> is used to insist that certain roles are performed by two different clients. (The condition with respect to what roles should be different depends on the properties of the given Plan) For exp. An annuitant and a Beneficiary cannot be the same person.	<b>ROLE1</b>  <b>ROLE2</b>	<b>Required attribute;</b> <b>Code:</b> RoleCode(As defined in AsCode table=>AsCodeRole)  <b>Required attribute;</b> <b>Code:</b> RoleCode(As defined in AsCode table=>AsCodeRole)	
<b>&lt;Validations&gt;</b>	<b>&lt;Validations&gt;</b> is used to perform certain age related validations.			
<b>&lt;AgeValidation&gt;</b>	<b>Required element;</b> <AgeValidation> tag is used to specify the range within which a particular Role's age should be present.	<b>ROLE</b>  <b>DISPLAY</b>  <b>MINIMUM</b>	<b>Required attribute;</b> <b>Code:</b> RoleCode(As defined in AsCode table=>AsCodeRole)  <b>Required attribute;</b> <b>String:</b> Display name of the Role	

		<b>MAXIMUM</b>	<p><b>Required attribute; Integer:</b> Minimum age for the specified role.</p> <p><b>Required attribute; Integer:</b> Maximum age for the specified role.</p>	
--	--	----------------	---	--

## 29. RoleToolTip

### Description

This Business Rule allows configuration of the RoleToolTip Business Rule.

### RoleToolTip Element \ Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<RoleToolTip>	The opening and closing tag of the RoleToolTip Business Rule.		
<Role>		ROLECODE	
<Row>			
<Field>		DISPLAY	

## 30. ScheduledValuation

### Description

This Business Rule allows configuration of the ScheduledValuation. The ScheduledValuation transactions are governed by the Transaction business rule performed.

## ScheduledValuation Element \ Attribute Table

Element\Tag	Attribute\Definition\Value\Data Type	
<ScheduledValuation> </ScheduledValuation>	Required parent element that indicates the opening and closing of the ScheduledValuation business rule.	
<Query>	Defines the opening and closing of a standard query for combos and radio fields. Contains an SQL that determines which Policies within the selected Plan are to have valuations performed and defines the parameters and/or variables to be used to query specified databases and/or tables to return specific results to be used to populate the selected screen fields on the ScheduledValuation screen.	
<PolicyValues>	This element specifies if the PolicyValues rule is to be processed during the valuations and provides Plan override capabilities for including or excluding the PolicyValues as part of the valuation process.	
	Yes	Indicates that PolicyValues are to be processed.
	No	Indicates that PolicyValues are not to be processed.
<WriteDeposits>	This element that indicates if deposit records are written to the AsScheduledValuationDeposit Table. By default, this value is set to "Yes".	
	Yes	Indicates that deposit information is to be written to the AsScheduledValuationDeposit table.
	No	Indicates that deposit information should not be written to the AsScheduledValuationDeposit table
<WriteChild>	This element that indicates if child deposit records are written to the AsScheduledValuationDeposit Table. By default, this value is set to "No".	
	Yes	Indicates that Child Fund deposit records should be written to Scheduled Valuation
	No	Indicates that Child Fund deposit records are not written to Scheduled Valuation
<Delete>	Specifies what entries to delete out of the AsValuesRequest table.	
<Status>	Any Math variable that holds 01, 02, 03, 04, 05	Status of the AsValuesRequest records you want to delete on a retry.

## Database Tables for ScheduledValuation

Table Name	Description
AsActivityValuationChild	ActivityValuation
AsScheduledValuationFundChild	ScheduledValuation

## XML Example

```
<ScheduledValuation>
  <Query>SELECT PolicyGUID, '[TypeCode]', '[ForceFlag]' FROM AsPolicy JOIN AsCode ON
  AsPolicy.StatusCode=AsCode.CodeValue AND
```

```

        AsCode.CodeName = 'AsCodeStatus' WHERE PolicyGUID= '9E2F7C5C-D6B3-D1BC-4A6C-
03467FBD79A4'</Query>
<PolicyValues>No</PolicyValues>
<WriteDeposits>No</WriteDeposits>
<WriteChild>Yes/No</WriteChild>
<Delete>
        <Status>Pending</Status>
        <Status>BusinessError</Status>
        <Status>SystemError </Status>
        <Status>Processing</Status>
</Delete>
</ScheduledValuation>

```

## 31. ScriptingCode

### Description

This Business Rule allows configuration of the ScriptingCode Business Rule.

#### ScriptingCode Element \ Attribute Table

Element\Tag	Attribute\Definition\Value\Data Type	
<ScriptingCode> </ScriptingCode>	Required parent element that indicates the opening and closing of the ScriptingCode business rule.	
<Function>	NAME	Name of the function

## 32. SegmentChangeAction

### Description

The SegmentChangeAction business rule allows the user to specify a transaction to execute when the “Calculate” or “Delete” (the trash can) button is clicked.

#### SegmentChangeAction Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<SegmentChangeAction>	The opening and closing tag of the SegmentChangeAction business rule.		
<Segment>	Defines the field values with a valid name of the Segment. Refer to the Programming Model section of the Technical Manual in AsSegmentName for	<b>String</b>	

	details.		
<b>&lt;Action&gt;</b>	Field values that define the type of action for this segment.	<b>TYPE</b>	<b>String</b> "" <b>SegmentUpdate</b> <b>SegmentDelete</b>
<b>&lt;Spawns&gt;</b>	Indicates the start of spawns action and determines spawn functionality for the specified transaction. Refer to the Transaction Configuration section of the Technical Manual for details and options.		
<b>&lt;Spawn&gt;</b>	Defines the condition to initiate the spawn and applies Math variables to determine whether to spawn the specified transaction. The Transaction Configuration section of the Technical Manual contains further information about the Spawn element and the available options.	<b>IF</b>	Old:Segment:SegmentActiveCode <&gt; Policy: SegmentActiveCode Policy:SegmentAmount <> Policy:SegmentAmount
<b>&lt;Transaction&gt;</b>	Defines the transaction spawn code field values. Same spawn codes available as for activities.	<b>SPAWNCODE</b>	<b>String</b> 01 - 09, 20
<b>&lt;SpawnFields&gt;</b>	Start of transaction/activity fields specification. Refer to the Transaction Configuration section of the Technical		

	Manual for further information about the <SpawnFields> element and the available options.		
<SpawnField>	Indicates start of spawn field specification and definition.		
<From>	Defines the Rule/math variable source for the spawned field.		<b>String</b>
<To>	Defines the value of the Activity field.		<b>String</b>
<DataType>	Defines the valid field value of the DataType.		<b>String</b>

## Database Tables for SegmentChangeAction

Table Name	Description
AsSegmentName	Contains a listing and description of all valid codes and values associated to the Segment Name

## XML Example

XML Example:

```
<SegmentChangeAction>
  <Segment SEGMENTNAME="Eclipse Base Coverage">
    <Action TYPE="SegmentUpdate,SegmentDelete">
      <Spawns>
        <Spawn IF="Old:Segment:SegmentActiveCode &lt;&gt; Policy: SegmentActiveCode ||
Policy:SegmentAmount &lt;&gt; Policy:SegmentAmount">
          <Transaction SPAWNCODE="01">CalculateSegments</Transaction>
          <SpawnFields>
            <SpawnField>
              <From>New:Segment:SegmentIssueDate</From>
              <To>OriginalSegmentIssueDate</To>
              <DataType>Date</DataType>
            </SpawnField>
            <SpawnField>
              <From>Old:Segment:SegmentActiveCode </From>
              <To>OldSegmentActiveCode</To>
              <DataType>Text</DataType>
            </SpawnField>
            <SpawnField>
              <From>New:Segment:SegmentActiveCode</From>
              <To>NewSegmentActiveCode</To>
```

```

        <DataType>Text</DataType>
      </SpawnField>
    <SpawnField>
      <From>Old:Segment:SegmentAmount</From>
      <To>OldSegmentAmount</To>
      <DataType>Money</DataType>
    </SpawnField>
    <SpawnField>
      <From>New:Segment:SegmentAmount</From>
      <To>NewSegmentAmount</To>
      <DataType>Money</DataType>
    </SpawnField>
  </SpawnFields>
</Spawn>
</Spawns>
</Action>
</Segment>
</SegmentChangeAction>

```

## 33. SegmentScreen

### Description

The business rule screen defines all the fields for the Segment screen. The business rule screen is configured to allow modifications to the sort order of the items displayed above the line within the Segment section of the screen.

### SegmentScreen Element \ Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<b>&lt;SegmentScreen&gt;</b>	The opening and closing tag of the SegmentScreen Business Rule.		
<b>&lt;DefaultSegment&gt;</b>	<b>Optional element;</b> Displays the column with 'Default' name in the segment table grid.		<b>Required Element value; Yes/No</b> <b>Yes:</b> Adds an additional column called "Default" in the Segment grid. <b>No:</b> No additional column will be added. This is the default behavior in the absence of this element.
<b>&lt;DefaultSegmentName&gt;</b>	<b>Optional element;</b> Defines what segment name to be selected by default in the coverage dropdown box when the Segment screen is loaded.		<b>Required Element value; SegmentName</b> Specified Segment Name will be set as default in the Coverage dropdown box. <b>Note:</b> If this element is not present first alphabetical segment will be selected.  When an invalid segment is

			specified or the specified valid segment is not valid for the plan the first alphabetical segment will be selected.
<SegmentTable>	<b>Required element;</b> Opening tag for defining segment columns and sorting of the Segment Table.	<b>ORDER BY</b>	<b>Optional attribute;</b> <b>Fields from</b> <b>SegmentName business rule / System defined Fields</b> This attribute is used to sort the Segment grid as per the specified field in the ascending order. <b>Note:</b> This attribute is used in the absence of <SortOrder> element. i.e. this is used for backward compatibility  System defined fields are reserved fields and they are mentioned in the below format : \$\$\$SegmentName\$\$\$, \$\$\$Status\$\$\$, \$\$\$EffectiveDate\$\$\$, and \$\$\$Mode\$\$\$
<SegmentColumn>	<b>Required element;</b> Defines the display of Segment column in segment table grid.	<b>WIDTH</b>  <b>ALIGN</b>	<b>Required attribute;</b> <b>Integer</b> To indicate the Width of the Column in the Segment table grid.  <b>Required attribute;</b> <b>Left/Right</b> To indicate the alignment formatting of the values in the columns <b>Left</b> - To align the values to the left <b>Right</b> - To align the values to the right.
<Display>	<b>Required Element;</b> Defines the value of the field for the Display Name (label) of a Segment Column.		<b>Required element value;</b> <b>String</b> Display name of the column.
<Name>	<b>Required element;</b>		<b>Required element value;</b>



	Name of the fields from SegmentName business rule or System defined fields such as \$\$\$\$SegmentName\$\$\$ and \$\$\$\$Status\$\$\$.		<b>String</b> Values can be SegmentField names or the system defined fields such as \$\$\$\$SegmentName\$\$\$ and \$\$\$\$Status\$\$\$.
<b>&lt;SortOrder&gt;</b>	<b>Optional element;</b> This element is used to sort the Segment table grid based on the Fields from SegmentName business rule and/or the System defined rules. Unlike ORDERBY attribute in <SegmentTable> element (which performs sorting based on only one value), <SortOrder> element is useful in performing the sorting based on multiple values. In addition, columns can be sorted either in ascending order or in descending order.		
<b>&lt;Field&gt;</b>	<b>Required/Repeatable element;</b> Used to specify the Field names with which Segment table should be sorted.	<b>TYPE</b>	<b>Required Element value; Fields from SegmentName business rule / System defined Fields</b> Segment Table is sorted based on the order in which Field names are present within the <SortOrder> element. i.e. the precedence of the sorting is determined by the order of the <Field>, where sorting is performed based on the Field name in top-most <Field> first and bottom-most <Field> last. <b>Note:</b> If field doesn't exist on a given Segment then that Segment is fit into the sort as having a blank String value for that field.  <b>Optional attribute; Ascending/Descending</b>

			<p><b>Ascending:</b> Allows sorting of Segment table by the specified field in ascending order</p> <p><b>Descending:</b> Allows sorting of Segment table by the specified field in descending order .</p> <p><b>Note:</b> When the TYPE attribute is not present, default sort order is "Ascending".</p>
<b>&lt;DisableSegmentFields&gt;</b>	<p><b>Optional element;</b> Used to disable Segment and Role fields for the specified Policy status.</p>		
<b>&lt;DisabledPolicyStatus&gt;</b>	<p><b>Required element;</b> Defines Policy status codes for which Segment fields and Role fields on the Segment screen should be disabled.</p>		<p><b>Required Element value; StatusCode</b> Policy status codes(As per AsCode =&gt; AsCodeStatus table).</p>
<b>&lt;DisabledRoleFields&gt;</b>	<p><b>Optional element;</b> To indicate whether or not (Segment) Role Detail Fields should also be disabled for a specific Policy status.</p>		<p><b>Required element value; Yes/No</b>  <b>Yes</b> - Indicates that the (Segment) Role Detail fields should be disabled  <b>No</b> - Indicates that the (Segment) Role Detail fields should still be accessible even if the Segment fields are disabled  <b>Note:</b>  When this element is not present, default behavior is that of "No".</p>
<b>&lt;ExclusionDateField&gt;</b>	<p><b>Optional element;</b> Used to control the availability of Excluded segments in the Coverage dropdown box. Excludes the Segment in the Coverage dropdown box only when the policy CreationDate is in between EffectiveDate and ExpirationDate of the segment as per AsSegmentNameExclusion Group table. The conditions to exclude</p>		<p><b>Required element value; CreationDate</b> If a Segment is present in AsSegmentNameExclusion Group table, then it can be excluded in the Coverage dropdown box only when either the Policy's CreationDate is in between the EffectiveDate and ExpirationDate of the Segment.</p>

	<p>the Segments are:</p> <p>1) EffectiveDate&lt;=CreationDate</p> <p>2) ExpirationDate is Null or ExpirationDate&gt;=CreationDate</p> <p><b>Note:</b> Excluded segment will be hidden only when the policy is having at least one active segment.</p>		
--	---	--	--

## SegmentScreen Image

Annuity Date	06/12/2061	OverRide Annuit. Date	<input type="text"/>
Annuity Option	Fixed Income With 120 Month Guarant	Maturity Date	12/12/2080
Annuitant Age	16	Owner Age	16
Annuitization Age	70		
Owner 59 1/2 Date	06/12/2050	Owner 70 1/2 Date	06/12/2061

GMIB-GOLD Rider	<input type="radio"/> Yes <input checked="" type="radio"/> No
Effective Date	<input type="text"/>
Termination Date	<input type="text"/>
MAV Base Limit Date	<input type="text"/>
Roll-Up Base Limit Date	<input type="text"/>
First Exercise Anniversary Date	<input type="text"/>
Last Exercise Anniversary Date	<input type="text"/>
Last Exercise Date	<input type="text"/>
Old MAV Base Limit Date	<input type="text"/>
Old Roll-Up Base Limit Date	<input type="text"/>
Old Last Exercise Anniversary Date	<input type="text"/>
Old Last Exercise Date	<input type="text"/>

Death Benefit Option	<input checked="" type="radio"/> Base <input type="radio"/> GMDB	GMDB Option	Return of Premium
GMDB MAV Limit Date	<input type="text"/>		
GMDB Roll-Up Limit Date	<input type="text"/>		
Old GMDB MAV Limit Date	<input type="text"/>		
Old GMDB Roll-Up Limit Date	<input type="text"/>		

ADB	<input type="radio"/> Yes <input checked="" type="radio"/> No
-----	---

## XML Example

```
<SegmentScreen>
  <DefaultSegment>No</DefaultSegment>
  <SegmentTable>
    <SegmentColumn WIDTH="60" ALIGN="LEFT">
      <Display>Date</Display>
      <Name>StartDate</Name>
    </SegmentColumn>
  </SegmentTable>
</SegmentScreen>
```

```

        <SegmentColumn WIDTH="232" ALIGN="LEFT">
            <Display>Type</Display>
            <Name>$$$SegmentName$$$</Name>
        </SegmentColumn>
        <SegmentColumn WIDTH="100" ALIGN="RIGHT">
            <Display>Benefit</Display>
            <Name>BenefitAmount</Name>
        </SegmentColumn>
        <SegmentColumn WIDTH="45" ALIGN="RIGHT">
            <Display>Status</Display>
            <Name>$$$Status$$$</Name>
        </SegmentColumn>
    </SegmentTable>
    <DisableSegmentFields>
        <DisabledPolicyStatus>01,03,06,07,10,19,21,22,30,33,35,36,37,39,40,41,42</DisabledPolicyStatus>
    </DisableSegmentFields>
    <DisableSpecialPrograms>
        <DisabledPolicyStatus>01,04,07,10,21,30,36,49,57</DisabledPolicyStatus>
    </DisableSpecialPrograms>
</SegmentScreen>

```

## 34. SegmentStatusChange

### Description

This Business Rule allows configuration of the SegmentStatusChange Business Rule.

### SegmentStatusChange Element \ Attribute Table

Element\Tag	Attribute\Definition\Value\Data Type
<SegmentStatusChange> </SegmentStatusChange>	Required parent element that indicates the opening and closing of the SegmentStatusChange business rule.
<SegmentGUID>	A valid segment GUID
<OldStatus>	Old status
<NewStatus>	New status to change

## 35. SegmentValidation

### Description

This Business Rule allows configuration of the SegmentStatusChange Business Rule.

### SegmentValidation Element \ Attribute Table

Element\Tag	Attribute\Definition\Value\Data Type
<SegmentValidation> </SegmentValidation>	Required parent element that indicates the opening and closing of the SegmentValidation business rule.
<DateValidations>	FIELD Name of the field or column
<DateValidation>	MESSAGE Minimum value message
<MinimumValue>	

## 36. StateApprovalScreen

### Description

This Business Rule allows configuration of the StateApprovalScreen Business Rule.

### StateApprovalScreen Element \ Attribute Table

Element\Tag	Attribute\Definition\Value\Data Type
<StateApprovalScreen> </StateApprovalScreen>	Required parent element that indicates the opening and closing of the StateApprovalScreen business rule.
<StateApprovalTypes>	
<StateApprovalTypeCode>	

## 37. StatusChange

### Description

This Business Rule processes any status changes on a policy bringing the policy up to date (ie. Processing the Transaction attached to this Business Rule will change the Status of the Policy to the one specified in this BR). For example, changing the Policy status from Lapse to Loan Repayment.).

### StatusChange Element \ Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<StatusChange>	The <b>Required</b> opening and closing tag (Root tag) of the StatusChange Business Rule.		
<Change>	<b>Required;</b> Determines whether the Policy's status should be changed or not.	<b>IIF</b>	<b>Required; String</b> <b>YES</b> - Indicates that Policy's Status should be changed. <b>NO</b> - Indicates that Policy's Status should not be changed.  <b>Optional;String;</b> <b>= "EXPRESSION"</b> For example: IIF = "1=1" The condition that <b>MUST</b> (IIF=If and Only If) be satisfied that in order to change the status.
<To-StatusChange>	<b>Required;</b> Indicates the Policy Status Code to which the Policy's Status should be changed		<b>Required element value;</b> <b>Code</b> Policy Status Code from AsCode => AsCodeStatus table

	to.		
--	-----	--	--

## 38. SurrenderCharges

### Description

This business rules defines how SurrenderCharges are determined. Surrender Charge is the fee assessed when a client surrenders a policy. It is generally calculated as described below.

Surrender charge amounts on withdrawals that exceed the Free Amount = Maximum % on each premium payment, reduced annually over certain specified number of years. This business rule is run during valuation.

### SurrenderCharges Element \ Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<SurrenderCharges>	<b>Required parent element;</b> Indicates the opening and closing of the SurrenderCharges Business Rule..	RATEDATE	<b>Optional attribute;</b> <b><u>SurrenderDate</u></b> Uses the surrender date to calculate the surrender rate/charges for the policy. Pulls rate from AsRate table for date of Policy surrender.
<SurrenderCharge>	<b>Required element;</b> Defines what criteria is being used to determine the Surrender charges.	MONEYTYPE	<b>Required Element value;</b> <b><u>MathVariable/TableFile</u></b> Either a MathVariable or TableFile should be referenced here. This is typically calling on another business rules which works in conjunction with SurrenderCharges.  <b>Required attribute;</b> <b><u>MoneyTypeCode</u></b> Defines Money TypeCode for SurrenderCharges from AsCode=>AsCodeMoneyType table.

## 39. SuspenseBatchScreen

### Description

The Suspense batch process starts with any insurance company's Document Service area receiving the Check/EFT. 10 or 20 or 30 Checks that are related to each other in some form like same bank, client etc., can be combined to form a batch, depending on the insurance company's preference.

One Suspense record is created for each Check of a Suspense Batch through the SuspenseBatchScreen. Each newly added Suspense record through this screen shall be displayed in the Table present above the details section of the Suspense Batch screen and they will be in Pending Status until the batch is completed. A unique Batch number is issued to the batch when it is created. Also, a unique Suspense number is generated when each Suspense record of a batch is created.

**Note:** This is a Code driven Screen. If there are no Configuration in the BusinessRule, then the Screen will still be usable with the Fixed Fields that are in place.

### SuspenseBatchScreen Element \ Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<SuspenseBatchScreen>	The opening and closing tag of the SuspenseBatch Screen Business Rule.		
<FixedFields>	<b>Optional element;</b> This element allows the fixed fields to have the same configuration capabilities as dynamic ( below the line ) fields, the only exception being the ability to change the fixed field data types. These fields are stored in AsSuspense table.		
<Fields>	<b>Required element;</b> Allows configuration of dynamic fields that are stored in AsSuspenseField table. These fields are		



	displayed in the Suspense details portion of the SuspenseBatchScreen		
<b>&lt;MultiFields&gt;</b>	<b>Optional element;</b> Allows configuration of MultiFields in the SuspenseBatch Screen	<b>RULE</b>	<p><b>Required element value;</b> <b>Yes/No</b> MultiFields enables and allows SuspenseBatchScreen with multiple sets of dynamic field values. The Yes/No element values can be used to turn On/Off the multifields section on SuspenseBatchScreen. <b>Yes</b> - Enables the MultiField Business Rule (turns on) and if set to "Yes" Multi Fields should be generated on the SuspenseBatchScreen <b>No</b> - Defaults and disables the Multifield Business Rule (turns off) and if set to "No" Multi Fields should not be generated on the SuspenseBatchScreen. <b>Note:</b> If this element is not present default is "No".</p> <p><b>Required attribute;</b> <b>Rule= "MultiFieldBusinessRule"</b> <b>For Example:</b> &lt;MultiFields RULE="MultiFields- TestSuspenseFields"&gt;Yes&lt;/MultiFi elds&gt;</p>
<b>&lt;Validation&gt;</b>	<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.		
<b>&lt;OnLoad&gt;</b>	<b>Optional element;</b> Indicates the start of field definition and values applying to math calculation to enable this functionality. Refer to the OnLoad and OnChange sections of the Transaction Configuration section of		

	<p>the Technical Manual. This contains further information about the available options for these elements.</p> <p><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 Transaction Configuration section of the Technical Manual for the &lt;OnChange&gt; details and available options.</p>		
<b>&lt;SearchFields&gt;</b>	<p><b>Required element;</b> This element is used to specify the Fields using which specific Suspense records/batch can be searched. These Fields act as the Filter criteria in SuspenseSearchScreen .</p>		
<b>&lt;Field&gt;</b>	<p><b>Required / Repeatable element;</b> This element is used to specify the Field Name that needs to be available in the SuspenseSearchScreen</p>		<p><b>Required element value; Field Name</b> <b>Note:</b> Both Dynamic and Fixed fields can be used as the Search Fields.</p>

	as a Search Field.		
<b>&lt;Table&gt;</b>	<b>Required element;</b> This element is used to configure the portion of the Screen that displays the summary information in columnar form for the newly added suspense items of a batch.		
<b>&lt;Column&gt;</b>	<b>Required element;</b> This element is used to configure the required Columns with which the selected Suspense records details should be displayed. Some of the Elements that can be displayed are Suspense Number, Policy Number, Statutory Company, Amount, Last Name, Effective Date ,Attached Amount, Status.	<b>WIDTH</b>  <b>ALIGN</b>  <b>FORMAT</b>	<b>Optional attribute;</b> <b>= "Integer"</b> To define the Column Width.  <b>Optional attribute;</b> <b>= "LEFT / CENTER / RIGHT"</b> To define the alignment with which the values should be displayed in the Columns.  <b>Optional attribute;</b> <b>= "TEXT / DATE / CURRENCY"</b> To define the format with which the values should be displayed in the Columns.
<b>&lt;Display&gt;</b>	<b>Required element;</b> Label or display Name of the Column on the SuspenseBatchScreen, indicates how the field name will be displayed on the screen.		
<b>&lt;Name&gt;</b>	<b>Required element;</b> Exact name of the Column that will be displayed on the SuspenseBatchScreen.		
<b>&lt;Group&gt;</b>	<b>Required element;</b> This element identifies the table where the specified Field (Field is indicated by the <Name> element) is stored. <b>Note:</b> The name of the table in which a particular Field is stored should be mentioned without the prefix As. For e.g.: for the Fixed field, SuspenseNumber,		

	<Group> tag is defined as below. <Group>Suspense</Gro up>		
--	--	--	--

## Database Tables for SuspenseBatchScreen

Table Name	Description
AsSuspense	Holding area for money transactions
AsSuspenseField	Stores Field names and values related to Suspense Records

## XML Example

```

<SuspenseBatchScreen>
  <Fields>
    <Field>
      <Name>Filler</Name>
      <Display></Display>
      <DataType>Blank</DataType>
    </Field>
    <Field>
      <Name>Filler</Name>
      <Display></Display>
      <DataType>Blank</DataType>
    </Field>
    <Field>
      <Name>SuspenseFromCompany</Name>
      <Display>Suspense From Company</Display>
      <ToolTip>Suspense Company</ToolTip>
      <DataType>Combo</DataType>
      <Disabled>Yes</Disabled>
      <Query TYPE="FIXED">
        <Options>
          <Option>
            <OptionValue>0</OptionValue>
            <OptionText>N/A</OptionText>
          </Option>
        </Options>
      </Query>
    </Field>
    <Field>
      <Name>FromPolicyNumber</Name>
      <Display>From Contract No</Display>
      <DataType>Text</DataType>
      <Disabled>No</Disabled>
    </Field>
  </Fields>
  <Validation ONSAVE="Yes">
    <Required>
      <Field>FirstName</Field>
      <Field>LastName</Field>
    </Required>
    <Expressions>
      <Expression MESSAGE="Either Last Name or Policy Number is  
Required.">!(document.frmSuspense.txtPolicyNumber.value == " &amp;&amp;  
document.frmSuspense.txtLastName.value == ")
    </Expression>
      <Expression MESSAGE="Gross Recalculate does not equal Gross Running  
Total">!(parseFloat(document.frmSuspense.txtGrossRecalculate.value) !=  
parseFloat(document.frmSuspense.txtGrossRunningTotal.value))
    </Expression>
    </Expressions>
  </Validation>
</SuspenseBatchScreen>

```

```

</Validation>
<SearchFields>
  <Field>
    <Name>SuspenseNumber</Name>
    <Display>Suspense Nbr</Display>
  </Field>
  <Field>
    <Name>EffectiveFromDate</Name>
  </Field>
  <Field>
    <Name>EffectiveToDate</Name>
  </Field>
  <Field>
    <Name>Amount</Name>
  </Field>
  <Field>
    <Name>PolicyNumber</Name>
    <Display>Contract Number</Display>
  </Field>
  <Field>
    <Name>LastName</Name>
  </Field>
  <Field>
    <Name>ItemNumber</Name>
  </Field>
  <Field>
    <Name>AttachedPending</Name>
  </Field>
</SearchFields>
<ResultFields>
  <Section>
    <Field>
      <Name>SuspenseNumber</Name>
      <Title>Number</Title>
    </Field>
    <Field>
      <Name>PolicyNumber</Name>
      <Title>Policy#</Title>
    </Field>
    <Field>
      <Name>Company</Name>
      <Title>Company</Title>
    </Field>
    <Field>
      <Name>EffectiveDate</Name>
      <Title>Effective</Title>
    </Field>
    <Field>
      <Name>Amount</Name>
      <Title>Amount</Title>
    </Field>
  </Section>
  <Section>
    <Field>
      <Name>SuspenseNumber</Name>
      <Title>Number</Title>
    </Field>
    <Field>
      <Name>LastName</Name>
      <Title>Last</Title>
    </Field>
    <Field>
      <Name>FirstName</Name>
      <Title>First</Title>
    </Field>
    <Field>
      <Name>AttachedAmount</Name>
      <Title>Attached</Title>
    </Field>
  </Section>

```

```

        <Field>
            <Name>PendingAmount</Name>
            <Title>Pending</Title>
        </Field>
        <Field>
            <Name>ClientNumber</Name>
            <Title>Client</Title>
        </Field>
    </Section>
</Resultfields>
</SuspenseBatchScreen>

```

## 40. SuspenseRefundScreen

### Description

This Business Rule allows a user to perform a refund of funds that were put into a Suspense after being received from a bank. The Role/Client to whom the refund should be sent to must be listed in the configuration.

### SuspenseRefundScreen Element \ Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<SuspenseRefundScreen>	<b>Required element;</b> The Opening and Closing tag of the SuspenseRefundScreen Business Rule.		
<CompanyTitle>	<b>Required element;</b> It is used to configure the display name of the Fixed Field, Company.		<b>Required element value;</b> <b>Alternative Display name of the Fixed Field</b> To indicate the alternative name with which the Fixed Fields should be displayed.
<PlanTitle>	<b>Required element;</b> It is used to configure the display name of the Fixed Field, Plan.		<b>Required element value;</b> <b>Alternative Display name of the Fixed Field</b> To indicate the alternative name with which the Fixed Fields should be displayed. Defines client specific fixed fields.

<b>&lt;SuspenseRefundStatusTitle&gt;</b>	<b>Required element;</b> It is used to configure the display name of the Fixed Field, Status.		<b>Required element value;</b> <b>Alternative Display name of the Fixed Field</b> To indicate the alternative name with which the Fixed Fields should be displayed. Defines client specific fixed fields.
<b>&lt;SuspenseRefundNumberTitle&gt;</b>	<b>Required element;</b> It is used to configure the display name of the Fixed Field, Number.		<b>Required element value;</b> <b>Alternative Display name of the Fixed Field</b> To indicate the alternative name with which the Fixed Fields should be displayed.
<b>&lt;Fields&gt;</b>	<b>Optional element;</b> Allows configuration of dynamic fields.  <b>Note:</b> AutomaticSuspenseRefundNumber is used to generate the Suspense Refund Number in J2EE. (DotNet uses AutomaticPolicyNumber to generate the automatic Suspense Refund number) and store the record in AsPolicy table. The newly generated Refund Number is stored in the Policy Number column. When queried in AsPolicyField table using the corresponding PolicyGUID of the newly generated SuspenseRefund Number, the dynamic fields of the SuspenseRefundScreen can be seen.		
<b>&lt;FixedFields&gt;</b>	<b>Optional</b>		

	<p><b>element;</b> This element allows the fixed fields to have the same configuration capabilities as dynamic ( below the line ) fields, the only exception being the ability to change the fixed field data types Press &lt;FixedFields&gt; link for additional information on the &lt;FixedFields&gt; Element configuration. <b>Note:</b> Unlike other Business Rules, the display name of the Fixed fields cannot be changed using the &lt;FixedFields&gt; element. Title elements should be used to do this.</p>		
<Buttons>	<p><b>Required element;</b> This element is used to configure the required buttons for this screen <b>Note:</b> Unlike some of the business rules, buttons must be configured within this business rule.</p>		<b>String</b> - Button Name
<Button>	<p><b>Required element;</b> Defines the display of function buttons on the SuspenseRefund screen.</p>		<p><b>Required element value;</b> <b>ButtonName</b> Allows the display of specified buttons on the SuspenseRefund screen. <b>Note:</b> Following buttons are generally configured on this Screen: <b>SAVE, ACTIVITY, FIND, NEW, and CLOSE</b> buttons.</p>
<OnLoad>	<p><b>Optional element;</b> Indicates the start of field definition and values applying to math calculation to enable this functionality. Refer to the OnLoad and OnChange sections of the Transaction Configuration section in the Technical</p>		



	<p>Manual. This contains further information about the available options for these elements.</p> <p><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;Field&gt;</b>	Name of the field to load.		
<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;Roles&gt;</b>	<p><b>Optional element;</b> Opening and closing element. This element is responsible for the display of Suspense Refund Roles section in the Suspense Refund screen.</p>		
<b>&lt;Role&gt;</b>	<p><b>Required / Repeatable element;</b> This element is used to define the Roles and their</p>		

	associated properties that should be listed in the Suspense Refund Roles section. Only those Roles can be assigned to receive a refund.		
<b>&lt;RoleCode&gt;</b>	<b>Required element;</b> To indicate the Role code of the Role that should be displayed in the Maintain Roles dropdown box.	<b>NAME</b>	<b>Required element value;</b> <b>RoleCode</b> Role Code of the Role as per AsCodeRole table.  <b>Optional attribute;</b> <b>= "RoleName"</b> To indicate the Role Name as specified in AsCodeRole table.
<b>&lt;RoleCount&gt;</b>	<b>Optional element;</b> Specifies the number of times a Role can be assigned to Refund. If there can only be Two Payee's for a Policy who will receive a refund than it should not be possible to add more than TWO.		<b>Required element value;</b> <b>(Integer / *)</b> <b>Integer</b> - Allows the user to assign this type of Role only for the specified number of times  Allows the User to assign this type of Role any number of times.
<b>&lt;RolePercent&gt;</b>	<b>Optional element;</b> Defines the default Role percent to be assigned to the role.		<b>Required element value;</b> <b>Integer</b> <b>0-100 percent is a valid value.</b> Allows the specified role percent will be assigned as default percent to the Role.
<b>&lt;AutomaticSuspenseRefundNumber&gt;</b>	<b>Optional element;</b> Allows the generation of Automatic Suspense Refund Number when a new Suspense Refund is saved. The generated Refund number should be as per the format specified in AutomaticSuspenseRefundNumber Business Rule.		<b>Optional element value;</b> <b>Yes / No</b> <b>Yes</b> - Allows the generation of Suspense Refund Number as per the format specified in the AutomaticSuspenseRefundNumber business rule.

			<b>No</b> - When set to "No", no Suspense Refund record will be saved in AsPolicy table.
--	--	--	--

## SuspenseRefundScreen Image

**Suspense Refund**

Company: Acme Life Plan: ParWL  
 Refund Number: Status: Pending  
 Statutory Company: MLLIC

Save Activity Find New Close

**Suspense Refund Roles**

Maintain: Payee

Role	Name	Tax ID	Percent	Edit
------	------	--------	---------	------

## Database Tables for SuspenseRefundScreen

Table Name	Description
AsDetailSuspense	Holds data containing disbursement to clients
AsPlan	Contains a listing of all valid Plan names
AsSuspense	Holding area for money transactions
AsSuspenseField	Stores Field names and values related to Suspense Records

## XML Example

```
<SuspenseRefundScreen>
  <CompanyTitle>Company</CompanyTitle>
  <PlanTitle>Plan</PlanTitle>
  <SuspenseRefundStatusTitle>Status</SuspenseRefundStatusTitle>
  <SuspenseRefundNumberTitle>Refund Number</SuspenseRefundNumberTitle>
  <Fields>
    <Field>
      <Name>StatutoryCompany</Name>
      <Display>Statutory Company</Display>
      <DataType>Combo</DataType>
      <DefaultValue>301</DefaultValue>
      <Query TYPE="FIXED">
        <Options>
          <Option>
            <OptionValue>301</OptionValue>
            <OptionText>MLLIC</OptionText>
          </Option>
          <Option>
            <OptionValue>501</OptionValue>
            <OptionText>MLLICNY</OptionText>
          </Option>
        </Options>
      </Query>
    </Field>
  </Fields>
</SuspenseRefundScreen>
```

```

        </Query>
    </Field>
</Fields>
<Buttons>
    <Button>Save</Button>
    <Button>Activity</Button>
    <Button>Find</Button>
    <Button>New</Button>
    <Button>Close</Button>
</Buttons>
<Roles>
    <Role>
        <RoleCode NAME="Payee">04</RoleCode>
        <RoleCount>*</RoleCount>
        <RolePercent>100</RolePercent>
        <ClientType>02,01</ClientType>
    </Role>
</Roles>
<ShowSegmentRoles>Yes</ShowSegmentRoles>
<AutomaticSuspenseRefundNumber>Yes</AutomaticSuspenseRefundNumber>
<DisableSuspenseRefundFields>
    <DisabledStatus>01,07,10,30,45,46</DisabledStatus>
</DisableSuspenseRefundFields>
</SuspenseRefundScreen>

```

## 41. SuspenseRefundSearchScreen

### Description

This business rule defines what will appear on the SuspenseRefundSearchScreen. It is configurable based upon the Clients needs.

### SuspenseRefundSearchScreen Element \ Attribute Table

Element\Tag	Attribute\Definition\Value\Options	
<SuspenseRefundSearchScreen>	The opening and closing tag of the SuspenseRefundSearchScreen Business Rule.	
<FixedFields>	Allows configuration of 'above the line' fields. Press <FixedFields> link for additional information on <FixedFields> Element configuration.	
<Field>		
<Name>	The exact name of the Field (database name)	
<Display>	The Display Name of the Field, indicates how the field will display on the field.	
<DataType>	DataType of the Field; Text, Money, Date, etc.	
<Hidden>	Indicates if the field should be hidden.	Yes/No
<Table>	Controls the display of results, formats results in a table	
<Column>	WIDTH	Number. Defines the column width of the table and the number of characters that can be displayed in the specified column.

	ALIGN	<i>String</i> . LEFT, RIGHT, CENTER. Defines the data alignment of the column
	FORMAT	<i>String</i> . TEXT, CURRENCY, DATE. Allows formatting of data.
<Display>	String. Display Name of the Field, indicates how the field will display on the screen	
<Group>	String. Indicates the Table/Screen that stores the Fixed Field being referenced. The value used should be appropriate for the screen being configured. Client, Role, RoleField	
<Name>	Exact name of the Field (database name) <i>String</i>	
<DataType>	Defines the datatype of the field <i>String</i>	

## XML Example

```

<SuspenseRefundSearchScreen>
  <FixedFields>
    <Field>
      <Name>Company</Name>
      <Display>Company</Display>
      <DataType>Text</DataType>
    </Field>
    <Field>
      <Name>RefundNumber</Name>
      <Display>Refund Number</Display>
      <DataType>Text</DataType>
    </Field>
    <Field>
      <Name>Status</Name>
      <Display>Status</Display>
      <DataType>Text</DataType>
    </Field>
  </FixedFields>
  <Hidden>Yes</Hidden>
  </Field>
</SuspenseRefundSearchScreen>

<Table>
  <Column WIDTH="152" ALIGN="LEFT" FORMAT="Text">
    <Display>Refund Number</Display>
    <Group>SuspenseRefund</Group>
    <Name>RoleCode</Name>
  </Column>
  <Column WIDTH="152" ALIGN="LEFT" FORMAT="Text">
    <Display>Company</Display>
    <Group> SuspenseRefund </Group>
    <Name>Company</Name>
  </Column>
  <Column WIDTH="153" ALIGN="LEFT" FORMAT="Text">
    <Display>Plan</Display>
    <Group> SuspenseRefund </Group>
    <Name>Plan</Name>
  </Column>
</Table>

```

## 42. SuspenseScreen

### Description

This Business Rule is used to create and control Suspense records. Suspense Records are used to track money. It identifies where the money came from and allows for the money to be used as payment to various policies. A Suspense Record is used as a 'holding' account until the money is applied or refunded. A unique Suspense Number is generated with the suspense record for identification purposes.

### Additional Information:

Suspense Records are written to the suspense account(s) for the company's general ledger. These records temporarily hold transactions until an activity generates a process to disperse or apply the money. Once when the respective activities are processed, the company's actual general ledger is updated. These transactions are specific to the inbound and outbound tracking of pieces of money received and disbursed by the insurance company.

For example, A Customer may submit payments like Initial or additional Premiums, Service charges etc to the Insurance Company, along with the completed application. Within OIPA, processing activities like InitialPremium, AdditionalPayment would apply the money from Suspense account to the respective accounts. Similarly, processing activities like FreeLook -> Disbursement is used to disburse the money back to the Customer from the Suspense account.

### SuspenseScreen Element \ Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<SuspenseScreen>	The opening and closing tag of the SuspenseScreen Business Rule.		
<SuspenseNumber>	<b>Required Root Element;</b> This tag indicates the opening and closing tag of the SuspenseScreen Business Rule.	<b>PREFIX</b>	<b>Required attribute value;</b> = <b>String</b> The value with which the Suspense Number should be prefixed.
<Substitutions>	<b>Optional Element;</b> This tag is used to change the display name of the Fixed and Dynamic fields within		

	the Suspense Screen.		
<b>&lt;Fields&gt;</b>	<b>Required Element;</b> Allows configuration of dynamic fields.		
<b>&lt;Field&gt;</b>	<b>Required/Repeatable Element;</b> The opening and closing tag for each Field being configured. <Name>, <Display>, <DataType>, <Disabled> and <Query> are the allowed elements for dynamic fields.		
<b>&lt;FixedFields&gt;</b>	<b>Optional Element;</b> Allows configuration of fixed fields.		
<b>&lt;MultiFields&gt;</b>	<p><b>Optional element;</b> Allows configuration of MultiFields in the SuspenseScreen Press &lt;MultiFields&gt; link for additional information on the &lt;MultiFields&gt; Element configuration.</p> <p><b>Additional Information:</b> MultiFields enables and allows screen transaction configuration with multiple sets of dynamic field values on various screens.</p>	<b>RULE</b>	<p><b>Required Element Value;</b> MultiFields enables and allows screen transaction configuration with multiple sets of dynamic field values on various screens. The yes/No element values can be used to turn On/Off the multifields section on ChildFundScreen. This statement can occur in any in any part of the Transaction XML.</p> <p><b>Yes</b> - Enables the MultiField Business Rule (turns on) and if set to "Yes" Multi Fields should be generated on the ChildFundScreen</p> <p><b>No</b> - Defaults and disables the Multifield Business Rule (turns off) and if set to "No" Multi Fields should not be generated on the ChildFundScreen.</p>

			<b>Required attribute;</b> Rule= " <u>MultiField-BusinessRuleName</u> " For Example: <MultiFields RULE="MultiFields-TestWithdrawal">Yes</MultiFields>
<Validation>	<b>Required Element;</b> Allows an activity to validate data in the associated suspense record. Press <Validation> link for additional information on the <Validation> Element configuration. Refer to the Transaction Configuration section of the Technical Manual for <Validation> element details and available options.		
<OnLoad>	<b>Optional Element;</b> Indicates the start of field definition and values applying to math calculation to enable this functionality. Refer to the OnLoad and OnChange sections of the Transaction Configuration section in the Technical Manual. This contains further information about the available options for these elements.		
<OnChange>	Optional Element; Container for OnChange configuration. Indicates the start of field element values to		



	<p>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.</p> <p>OnChange is only stated and applied within a defined multifield section.</p> <p>Refer to the Transaction Configuration section of the Technical Manual for the &lt;OnChange&gt; details and available options.</p>		
<SearchFields>	<p><b>Required Element;</b> This tag is used to specify the Fields using which specific Suspense records can be searched. These Fields act as the Filter criteria in SuspenseSearchScreen.</p>		
<Field>	<p><b>Required/Repeatable Element;</b> This tag is used to specify the Field Name that needs to be available in the SuspenseSearchScreen as a Search Field</p>		<p><b>Required Element Value;</b> <u>Field Name</u> <b>Note:</b> Both Dynamic and Fixed fields can be used as the Search Fields</p>
<DisableSuspenseFields>	<p><b>Optional Element;</b> This tag is used to disable the Fields in the SuspenseScreen based on the Status of the Suspense Record.</p>		
<DisableFields>	<p><b>Required/Repeatable Element;</b> To specify the Name of the Fields that needs to be disabled</p>	<b>STATUS</b>	<p><b>Required attribute;</b> Status of the Suspense records populated from AsCode table. Depending on the status the</p>

	in the Suspense Screen for the Status mentioned in the <DisabledFields> tag.		configured fields can be disabled.
<DisableField>	<b>Required/Repeatable Element;</b> To specify the Name of the Fields that needs to be disabled in the Suspense Screen for the Status mentioned in the <DisabledFields> tag.		
<Name>	<b>Required Element;</b> Name of the Field to be disabled in SuspenseScreen		<b>Required Element value;</b> <u>Field Name</u> <b>Note:</b> Both Dynamic and Fixed fields can be used as the Search Fields
<DataType>	Optional Element; DataType of the Field to be disabled in SuspenseScreen.		<b>Required Element value;</b> <u>DataType of the Field</u>

## SuspenseScreen Image

Suspense Record(s)

Company: Acme Life

---

Policy Number:   
 Amount: \$0.00

Effective Date: 07/15/2096

Last Name:

First Name:

Account Number:

Check Number:

Bank Name:

Bank Number:

Type: AOC - Direct

Statutory Company: PLIC

From Contract No:

UniqueID:

NBCIndicator: Yes

---

Attached Amount: \$0.00

Status:

Suspense Number:

New Find History Save Delete Close

## Database Tables for Suspense Screen

Table Name	Description
AsSuspense	Holding area for money transactions

## XML Example

```
<SuspenseScreen>
  <FixedFields>
    <Field>
      <Name>PolicyNumber</Name>
      <Display>Contract Number</Display>
      <Hidden>No</Hidden>
    </Field>
    <Field>
      <Name>TypeCode</Name>
      <Display>Funding Method</Display>
      <DefaultValue>00</DefaultValue>
      <Disabled>Yes</Disabled>
      <Hidden>No</Hidden>
    </Field>
    <Field>
      <Name>AccountNumber</Name>
      <Hidden>Yes</Hidden>
    </Field>
    <Field>
      <Name>CheckNumber</Name>
      <Hidden>Yes</Hidden>
    </Field>
    <Field>
      <Name>BankName</Name>
      <Hidden>Yes</Hidden>
    </Field>
    <Field>
      <Name>BankNumber</Name>
      <Hidden>Yes</Hidden>
    </Field>
    <Field>
      <Name>AttachedAmount</Name>
      <Display>Applied Amount</Display>
      <Hidden>No</Hidden>
    </Field>
  </FixedFields>
  <DisableSuspenseFields>
    <DisableFields STATUS="16">
      <DisableField>
        <Name>PolicyNumber</Name>
        <DataType>Text</DataType>
      </DisableField>
      <DisableField>
        <Name>FirstName</Name>
        <DataType>Text</DataType>
      </DisableField>
      <DisableField>
        <Name>LastName</Name>
        <DataType>Text</DataType>
      </DisableField>
      <DisableField>
        <Name>NIGOFunding</Name>
        <DataType>Radio</DataType>
      </DisableField>
      <DisableField>
        <Name>ItemNumber</Name>
        <DataType>Text</DataType>
      </DisableField>
    </DisableFields>
  </DisableSuspenseFields>
</SuspenseScreen>
```

```

        </DisableField>
        <DisableField>
            <Name>FromContract</Name>
            <DataType>Text</DataType>
        </DisableField>
        <DisableField>
            <Name>SortCompany</Name>
            <DataType>Combo</DataType>
        </DisableField>
    </DisableFields>
</DisableSuspenseFields>
<Fields>
    <Field>
        <Name>SortCompany</Name>
        <Display>Company</Display>
        <DataType>Combo</DataType>
        <Query TYPE="SQL">SELECT " , " FROM DUAL UNION ALL SELECT FundClassGUID,
FundClassName FROM AsFundClass</Query>
    </Field>
    <Field>
        <Name>NIGOFunding</Name>
        <Display>NIGO Funding</Display>
        <DataType>Radio</DataType>
        <Query TYPE="FIXED">
            <Options>
                <Option>
                    <OptionValue>01</OptionValue>
                    <OptionText>Yes</OptionText>
                </Option>
                <Option>
                    <OptionValue>00</OptionValue>
                    <OptionText>No</OptionText>
                </Option>
            </Options>
        </Query>
        <DefaultValue>00</DefaultValue>
    </Field>
    <Field>
        <Name>ItemNumber</Name>
        <Display>Work Item #</Display>
        <DataType>Text</DataType>
    </Field>
    <Field>
        <Name>FromContract</Name>
        <Display>From Contract No.</Display>
        <DataType>Text</DataType>
    </Field>
    <Field>
        <Name>SystemDate</Name>
        <Display>SystemDate</Display>
        <DataType>Date</DataType>
        <Calculated TYPE="SYSTEM"></Calculated>
        <Disabled>Yes</Disabled>
        <Hidden>Yes</Hidden>
    </Field>
</Fields>
<OnLoad>
    <Field>PolicyNumber</Field>
    <Field>EffectiveDate</Field>
</OnLoad>
<OnChange>
    <Change>
        <Name>PolicyNumber</Name>
        <Type>Compare</Type>
        <Expression>1==1</Expression>
        <IfTrue>document.forms["SuspenseForm"]["policyNumber"].value =
document.forms["SuspenseForm"]["policyNumber"].value.toUpperCase();
document.forms["SuspenseForm"]["companyGuid"].disabled=true;</IfTrue>
    </Change>
</OnChange>

```

```

        <IfFalse>document.forms["SuspenseForm"]["policyNumber"].value =
document.forms["SuspenseForm"]["policyNumber"].value.toUpperCase();
document.forms["SuspenseForm"]["companyGuid"].disabled=true;</IfFalse>
    </Change>
    <Change>
        <Name>EffectiveDate</Name>
        <Type>Compare</Type>
        <Expression>new Date(document.forms["SuspenseForm"]["effectiveDate"].value).valueOf()
!= new Date(document.frmSuspense.txtSystemDate.value).valueOf() & amp; & amp;
document.forms["SuspenseForm"]["operation"].value== '$$$NewSuspense$$$'</Expression>
        <IfTrue>{alert('Is the effective date of the suspense item correct?');}</IfTrue>
        <IfFalse></IfFalse>
    </Change>
</OnChange>
<Validation>
    <Required>
        <Field>SortCompany</Field>
    </Required>
</Validation>
<SearchFields>
    <Field>
        <Name>SuspenseNumber</Name>
        <Display>Suspense Nbr</Display>
    </Field>
    <Field>
        <Name>EffectiveFromDate</Name>
    </Field>
    <Field>
        <Name>EffectiveToDate</Name>
    </Field>
    <Field>
        <Name>Amount</Name>
    </Field>
    <Field>
        <Name>PolicyNumber</Name>
        <Display>Contract Number</Display>
    </Field>
    <Field>
        <Name>LastName</Name>
    </Field>
    <Field>
        <Name>ItemNumber</Name>
    </Field>
    <Field>
        <Name>AttachedPending</Name>
    </Field>
</SearchFields>
<ResultFields>
    <Section>
        <Field>
            <Name>SuspenseNumber</Name>
            <Title>Number</Title>
        </Field>
        <Field>
            <Name>PolicyNumber</Name>
            <Title>Policy#</Title>
        </Field>
        <Field>
            <Name>Company</Name>
            <Title>Company</Title>
        </Field>
        <Field>
            <Name>EffectiveDate</Name>
            <Title>Effective</Title>
        </Field>
        <Field>
            <Name>Amount</Name>
            <Title>Amount</Title>
        </Field>
    </Section>
</ResultFields>

```

```

</Section>
<Section>
  <Field>
    <Name>SuspenseNumber</Name>
    <Title>Number</Title>
  </Field>
  <Field>
    <Name>LastName</Name>
    <Title>Last</Title>
  </Field>
  <Field>
    <Name>FirstName</Name>
    <Title>First</Title>
  </Field>
  <Field>
    <Name>AttachedAmount</Name>
    <Title>Attached</Title>
  </Field>
  <Field>
    <Name>PendingAmount</Name>
    <Title>Pending</Title>
  </Field>
  <Field>
    <Name>ClientNumber</Name>
    <Title>Client</Title>
  </Field>
</Section>
</ResultFields>
</SuspenseScreen>

```

## 43. SuspenseValidation

### Description

This Business Rule allows configuration of the SuspenseValidation Business Rule.

### SuspenseValidation Element\Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<b>&lt;SuspenseValidation&gt;</b>	The opening and closing tag of the SuspenseValidation Business Rule.		
<b>&lt;Validation&gt;</b>		<b>TYPE</b> <b>MESSAGE</b>	Validation type
<b>&lt;Field&gt;</b>			
<b>&lt;SuspenseField&gt;</b>			
<b>&lt;Fund&gt;</b>		<b>NAME</b>	Name of the fund.

## 44. SwapAddress

### Description

This Business Rule allows configuration of the SwapAddress Business Rule.

### SwapAddress Element \ Attribute Table

Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<SwapAddress>	The opening and closing tag of the SwapAddress Business Rule.		
<EffectiveDate>	Field or MathVariable that specifies when the new address is effective.		
<Address>	Field where the new address information is entered.		
<OldAddressRoleGUID>	Field or MathVariable that specifies the AddressRoleGUID of the address to be replaced.		

## 45. SwapAllocations

### Description

This Business Rule allows configuration of the SwapAllocations Business Rule.

### SwapAllocations Element \ Attribute Table

Element\Tag	Attribute\Definition\Value\Data Type	
<ReverseScreen> </ReverseScreen>	Required parent element that indicates the opening and closing of the SwapAllocations business rule.	
<FundList>	TYPE	
<AllocationTypes>		

## 46. SystemDateScreen

### Description

This business rule allows for the configuration of adding system date functionality to the OIPA system. Some applications require that certain dates be available in order for programs to

perform their functions; therefore, the ability to store these dates in one rational location to establish consistency through all applications is needed. Once the nightly cycle runs OIPA activities, reports, and feeds, the business rule and interface are directed to a common storage location to figure out what time the market is suppose to close to validate if the action that is about to occur is valid.

### SystemDate Screen Element\Attribute Table





















Element/Tag	Definition	Attribute	Element/Attribute Value and Description
<b>&lt;SystemDateScreen&gt;</b>	<b>Required Parental Element;</b> The opening and closing tag of the SystemDateScreen Business Rule.		
<b>&lt;Fields&gt;</b>	<b>Required Element;</b> Allows configuration of dynamic fields.		
<b>&lt;Buttons&gt;</b>	<b>Optional Element;</b> The Security and Help document contains further information about the <Button> and the available options.		
<b>&lt;Button&gt;</b>	<b>Required Element;</b> Defines the display of function buttons on SystemDateScreen		<b>Save</b> <b>Add</b> <b>Edit</b> <b>New</b> <b>Delete</b>
<b>&lt;Validation&gt;</b>	<b>Optional Element;</b> Allows configuration of edits and validations.		






## System Date Screen Image

System Date

Page 1 of 2
Page 1 2
Maximum Results: 10

System Date	Business Day Indicator	Current Indicator	Month End Indicator	Quarter End Indicator	Year End Indicator	Previous System Date	Next System Date	
09/19/2030	Y	N	N	N	N	09/18/2030	09/20/2030	 
09/19/2031	Y	N	Y	Y	Y	09/19/2031	09/19/2031	 
09/19/2032	N	N	Y	Y	N	09/19/2032	09/19/2032	 
09/19/2033	Y	N	Y	N	N	09/19/2033	09/19/2033	 
09/19/2034	Y	N	N	N	N	09/19/2034	09/19/2034	 
09/19/2035	N	N	Y	Y	N	09/19/2035	09/19/2035	 
09/19/2036	N	N	N	N	N	09/19/2036	09/19/2036	 
09/19/2037	N	N	N	N	N	09/19/2037	09/19/2037	 
09/19/2038	N	N	N	N	N	09/19/2038	09/19/2038	 
09/19/2039	N	N	N	N	N	09/19/2039	09/19/2039	 

System Date: 09/19/2030 
Previous System Date: 09/19/2030 
Next System Date: 09/19/2030 

Business Day Indicator: ☒
Current Indicator: ☐
Month End Indicator: ☐
Quarter End Indicator: ☐
Year End Indicator: ☐

Market Close Time:

Add
Close

## System Date Screen Database Tables

Table Name	Description
AsSystemDate	Stores the Date that is entered from the System Date screen
AsSystemDateField	Provides the GUID, the fieldname (MarketCloseTime) and FieldTypeCode

## XML Example

```

<SystemDateScreen>
  <Fields>
    <Field>
      <Name>MarketCloseTime</Name>
      <Display>Market Close Time</Display>
      <DataType>Text</DataType>
      <Disabled>No</Disabled>
    </Field>
  </Fields>
  <Buttons>
    <Button>Add</Button>
    <Button>Save</Button>
  </Buttons>
</SystemDateScreen>

```

## 47. SystemPlans

### Description

This business rule defines plans that will be excluded from the Policy Screen dropdown list. It is typically reserved for plans that will be supporting Suspense Refund.

### SystemPlans Element\Attribute Table

Element\Tag	Attribute\Definition\Value\Options
<SystemPlans> </SystemPlans>	The required opening and closing elements of this business rule.
<Plan>	PlanGUID