

Policy Center

Lesson Outline

- Business Rules
- Administration
- Summary

Business Rules

Business Rules

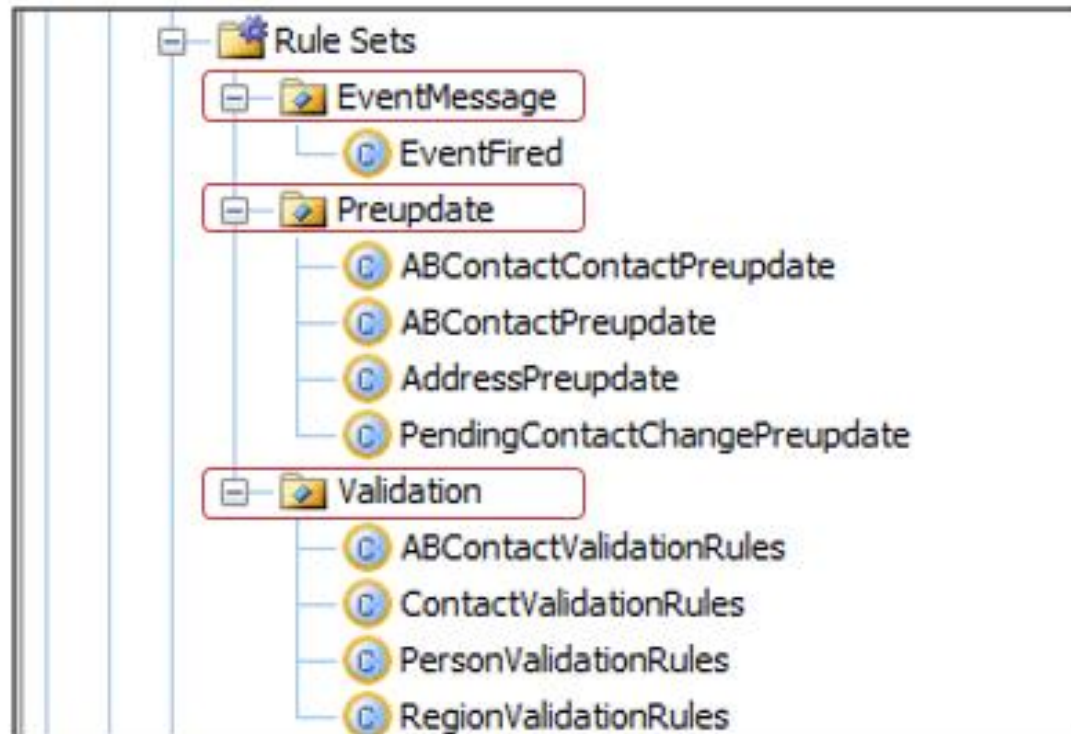
- A **business rule** is Gosu code that:
 - Accomplishes some task for given entity, and
 - Executes when specific event occurs to instance of that entity
- Eg : Policy assignment rules
 - Assign policy to a certain group based on location

Business rule hierarchy

- Three levels
 - Rule set categories : collection of rules that have common high-level business purpose
 - Rule sets : collection of rules that are attached to the same entity and share the same trigger
 - Rules : a set of one or more lines of code that typically executes one logical action

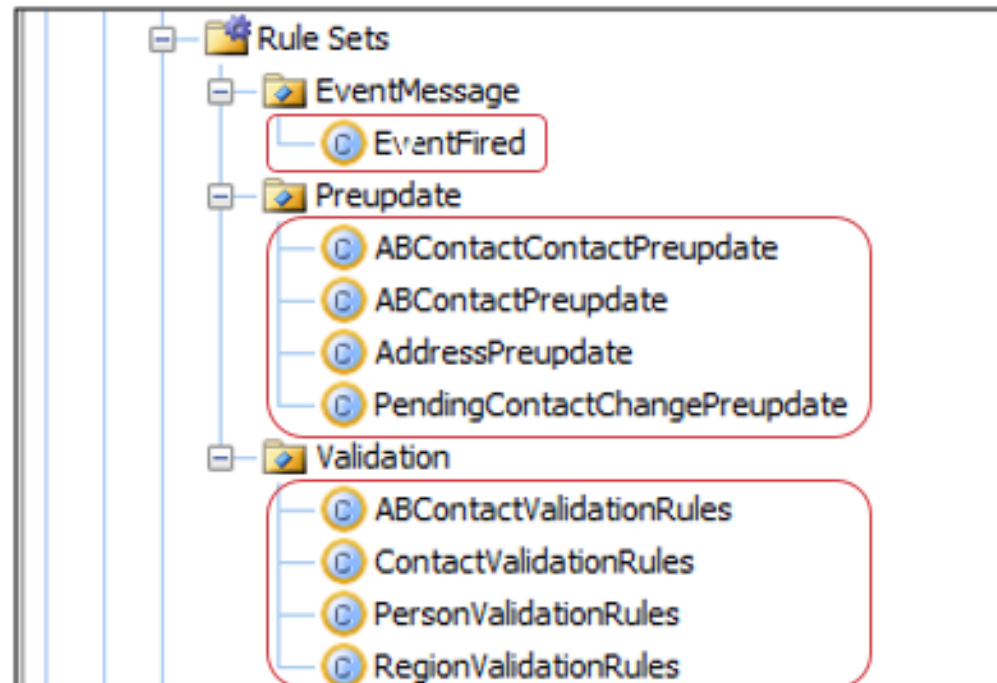
Hierarchy: rule set categories

- A **rule set category** is a collection of rules that have common high-level business purpose
 - Studio uses rule set categories to group similar rules together



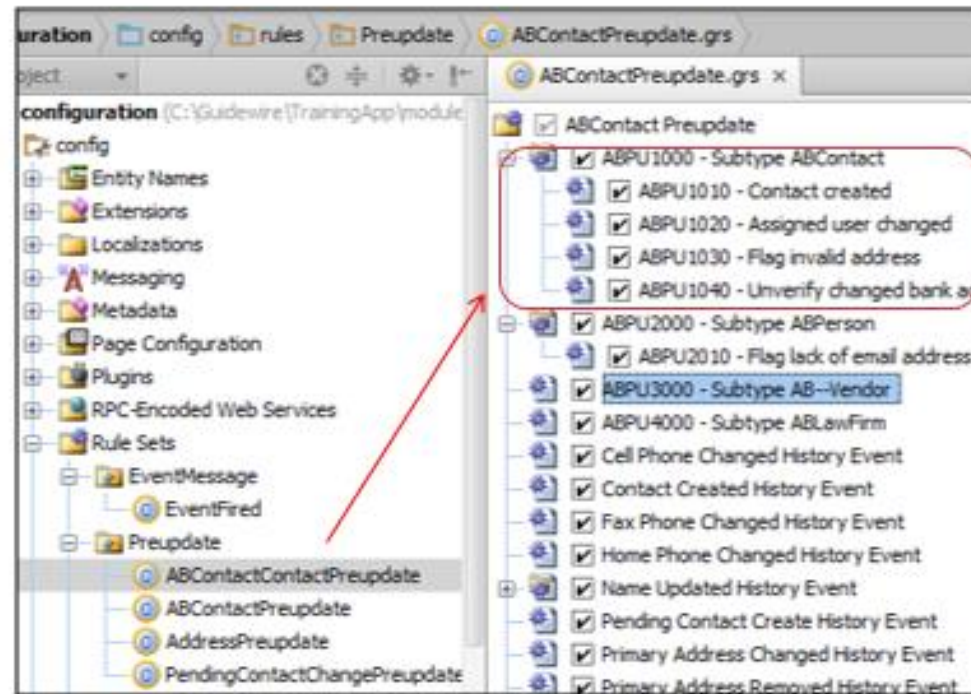
Hierarchy: rule sets

- A **rule set** is a collection of rules that are attached to the same entity and share the same trigger
 - For example, ABContact Pre-update rule set is attached to ABContact and triggers when any ABContact is created or modified



Hierarchy: business rules

- A **business rule** is a set of one or more lines of code that typically executes one logical action
- Rules can have child rules
 - If parent condition is true, parent action is executed and then child rules are executed



Root entity

- Every rule set has "root entity"
 - Identifies entity with which rule set is associated
- Every rule has access to object that triggered rule set
 - Object has same name as root entity

```
USES:

CONDITION (aBContact : entity.ABContact):
return //Check if contact is a vendor with no assigned
(aBContact typeis ABCompanyVendor or
aBContact typeis ABPersonVendor)
and
aBContact.AssignedUser == null
ACTION (aBContact : entity.ABContact, actions : gw.rules.Action):
// Execute the selectLeastBusyUser function. (This function takes an ABContact,
// finds the user with the fewest contacts, and then sets the AssignedUser
// field to that user. The function does not commit the data.

trainingapp.base.AssignedUserUtil.selectLeastBusyUser (aBContact)
END
```

"aBContact" is
ABContact
object which
triggered rule
set

Task

- Create a Rule to assign a Group based on Occupation.
- If the Occupation is Doctor, assign to “Actuary Unit” group

Administration

Users

- Users are people who are permitted to log into PolicyCenter.
- The goal of assignment is to assign work to users, which makes them owners of that work.
- Each user must belong to at least one group

Groups

- Basic way to organize a carrier's employees, the people available to handle policy, is through group
- A group's members can either be other groups—teams or subgroups—or users, people who work on claims
- Groups have the following additional properties:
 - There is no limit to the number of members and child group
 - A group always has one supervisor.
 - A group is described further by its group type, used in rules to determine if work is to be assigned to the group.

Roles

- Users have one or more roles, which are a collection of permissions.
- Permissions enable users to create, view, edit, and delete various PolicyCenter objects.

Region

- A region is a named area that contains one or more states, ZIP codes, or counties.
- For example, you can define a Western region that includes the states California, Nevada, and Washington

Authority Profiles

- Used to determine if a financial transaction can be automatically approved when it is created, or if it requires further manual approval by a supervisor.
- An authority limit is composed of an authority limit type and a limit amount.

Attributes

- PolicyCenter provides a general way to describe any user attributes that you need to use in assigning work
- PolicyCenter also has rules that assign work based on these attributes, such as selecting a user with a specified attribute by round-robin.
- For example, you can give French and Spanish the type Language.

Affinity Groups

- Some carriers write policies based on the insured belonging to a certain group.
- For these carriers, the lines of business in the base configuration enable you to associate an affinity group with a policy.

Activity Patterns

- Activity patterns are templates that standardize the way PolicyCenter generates activities
- Each pattern describes one kind of activity that might be needed in handling the job

Holidays

- Holidays can vary according to city, state, county, or country
- Since many holiday dates change annually, it is a good practice to edit these holidays at the beginning of each new year
- If you are sending mail to another country, you can have another type to describe days when mail is not delivered in that country as well

Script Parameters

- A script parameter is an application-wide global parameter that has a value that tends to change over time
- For example, script parameters can be used to set initial reserve values for full body damage, or minor body damage. These initial reserve values can change from year to year

Import/Export Data

- While users enter much of the administrative data directly into PolicyCenter, there are times when it is necessary or convenient to transfer this information in bulk.
- The Import/Export Data screen on the Administration tab provides a convenient way of moving administrative data, question sets, role definitions, and so on as XML or zipped XML files.

Summary

Gosu

- Gosu Overview
- Gosu Statements – Ternary Operators
- Arrays – hasMatch, where, each
- PCF Methods – Code tab of PCF files
- Partial Page Update – Enable PostOnChange

Policy Transactions

- Application Details
- Product Documentation
- Product Designer
- Policy Transactions
 - Submission : Potentially creates a policy
 - Policy Change : changes policy prior to expiration date
 - Renewal : creates a new policy for another term
 - Cancellation : ends policy before its expiration date
 - Reinstatement : reinstates canceled policy with original terms
 - Rewrite : creates new policy from existing policy

Queries and Bundles

- Script Parameters – Global Level Constants
- Gosu Queries
 - query object – make()
 - result object – select()
- Gosu Bundles – commit data using runWithNewBundle()

Validations

- Validation
- Data model level
 1. Datatypes
 2. Field validators
- UI level
 - Validation expression
- Entity Names - Every entity has internally defined DisplayName field.

Enhancements and Class

- Enhancements
 - Getter
 - Setter
 - Function
- Gosu Class
 - Create a Class
 - Extend a Class
- Logging and Exception Handling

Administration

- Business Rules - Accomplishes some task for given entity
 - Ruleset Category
 - Ruleset
 - Rules
- Admin features
 - User
 - Group
 - Role
 - Attributes
 - Region

Thank You