

## Exercise: XARC

### Exercise 1: Create a rule collection, write simple rule and add a connector to fire that rule.

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When using the toolkit, it is helpful to have one browser session logged in as administrator (using the toolkit to add/edit Product definitions) and another logged in as agent (to review the toolkit updates) rather than flipping back & forth between these modes.

Most browsers support this thru the use of a separate session:

- Internet Explorer 9 or later: File > New Session
- Firefox: File > New Private Window
- Chrome: File > New Incognito Window

...or you can use two different browser “brands” (for example, MSIE for agent & Firefox for admin)

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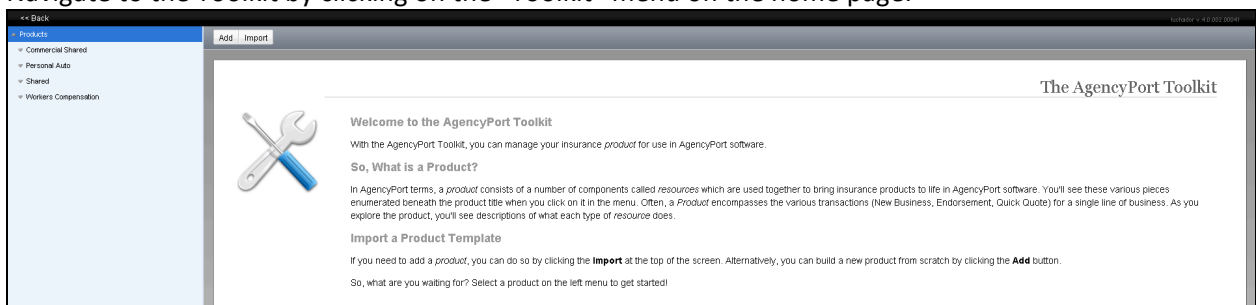
### Adding a New Rule collection

You must be logged in as an administrator to use the toolkit. Use the following credentials:

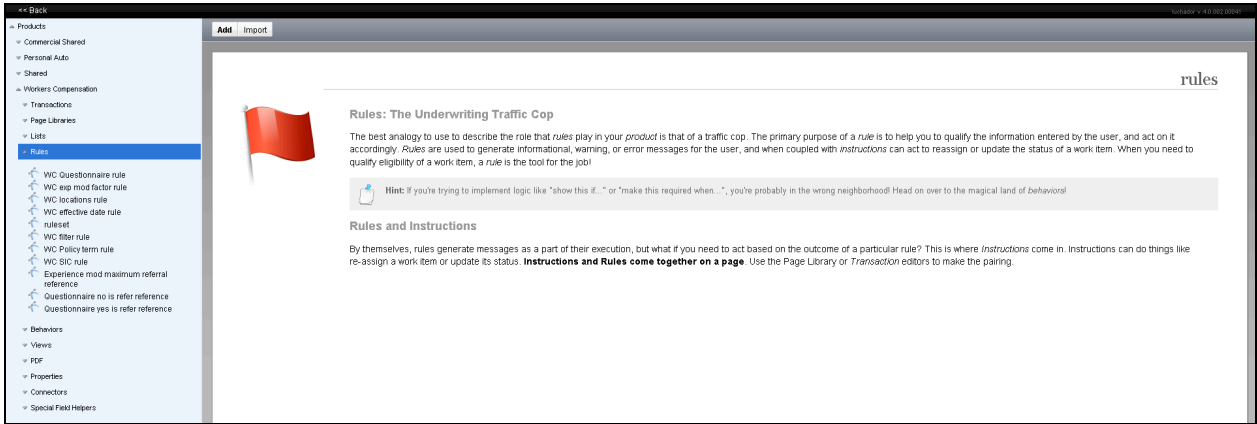
Username: administrator

Password: password

Navigate to the Toolkit by clicking on the “Toolkit” menu on the home page.



Expand the Workers Compensation menu and select the ‘Rules’ folder in the navigation window and click on the ‘Add’ action in the Editor. A pop-up window will display with some required data entry fields.



Enter a File Name, Title and an optional description for the page library and click on 'Create'. You can cancel this action by clicking on the 'x' in the top right corner of the window.

File Name: policyInfoRules.xml  
Title/Desc: Policy Information Rules  
Rule Library Id: PolicyInfoRules

Create Rules

\*File Name

policyInfoRules.xml

\*Title

Policy Information Rules

Description

Policy Information Rules

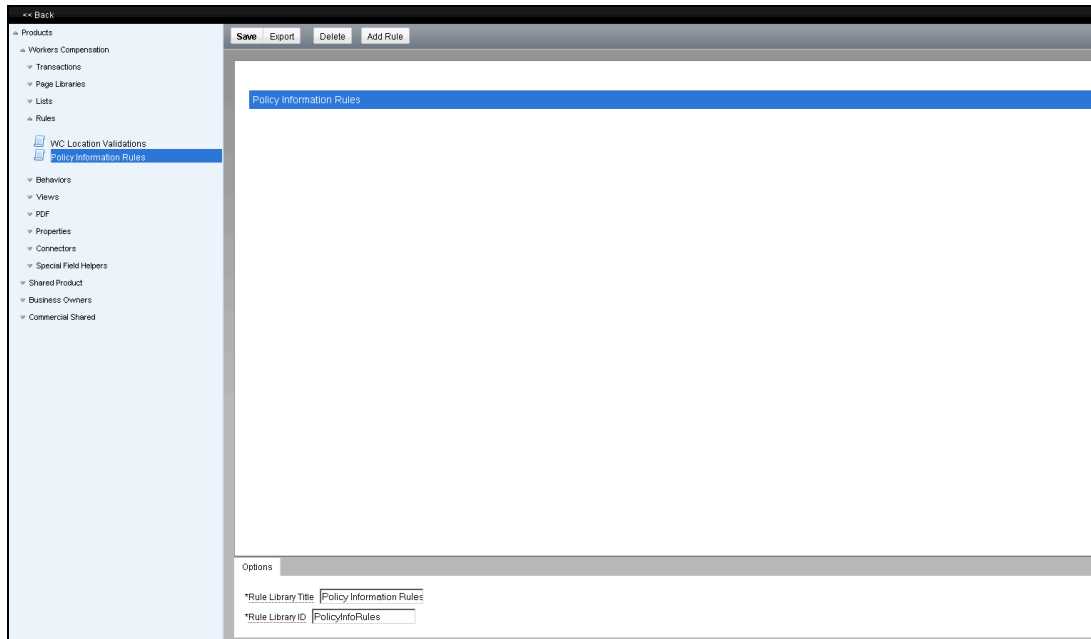
Required Info

\*Rule Library ID

PolicyInfoRules

Create

*Note: The file name must be unique. Select a name that will make the rules file easy to identify for maintenance and re-importing purposes.*



Click “Save” button to save the rule collection.

### Adding a Simple Rule:

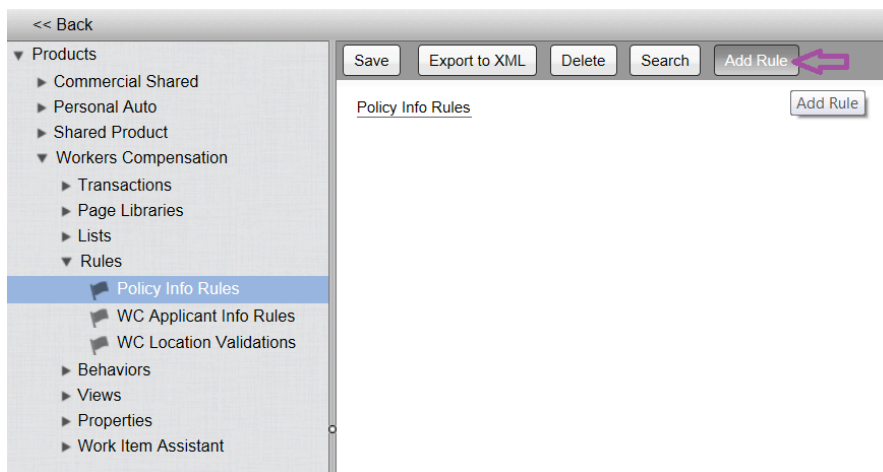
Requirement: If the Controlling state is in one of Massachusetts or Rhode Island display a message  
“Since there is a hurricane warning out for your state, we are unable to write your policy at this time”

Fields:

Controlling State: `Comm1Policy.ControllingStateProvCd`

Steps to write this rule:

1. Add the new rule by clicking on the Add Rule button:



2. Choose the default condition and choose the left operand type of field and select the Controlling State field as shown below
  - A condition is always defined as part of a rule, so a new blank condition is automatically created with the new rule

Conditions			
Order	Operand	Operator	Operand
0	Controlling State	Is in	FL,GA,SC,NC

Options
 

Advanced

\*Type

\*Page

\*FieldSet

\*Field

3. Choose “IS IN” operator. For the right operand choose the operand type of value and enter the values of state codes separated by commas.

Conditions			
Order	Operand	Operator	Operand
0	Controlling State	Is in	FL,GA,SC,NC

Options
 

Advanced

\*Type

\*Value

4. Add the appropriate message.

Messages	
Since there is a hurricane warning out for the state, we are unable to write your policy at this time	

Messages

\* Display Message Since there is a hurricane warning out for the state, we are unable to write your policy at this time

\* Message Severity

\* Show Multiple Messages

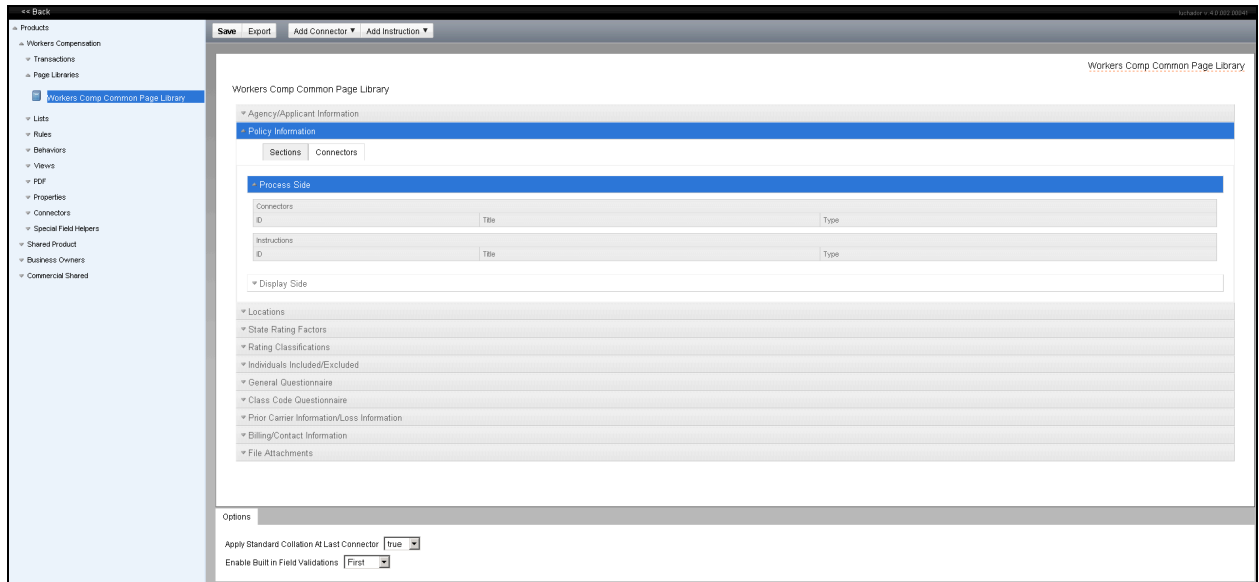
Message Class *(click to enter a value)*

## Assigning Rules – Adding Connectors

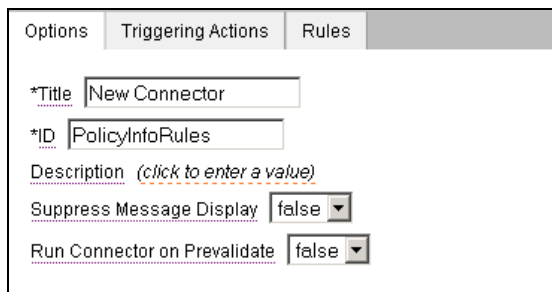
Connectors are the mechanism by which the framework integrates with third party services or the way to apply business specific logic. A common connector is one that triggers XarcRules.

Rules will only fire if a Connector is created to trigger them. Add a connector to any page where rules will fire.

Click on the Policy Information page and select the ‘Connectors’ tab and Select the ‘Process Side’ option. Leave any default Options in the palette as is.



Select 'Add Connector' in the Editor and choose 'xARC'. Click on the new connector ("New Connector") to bring up the options palette in the bottom half of the screen. Under Options, enter the required information.



**Title:** Enter a name for the Connector.

**ID:** Enter an ID that is unique within the Page Library.

**Description:** This describes what the connector does.

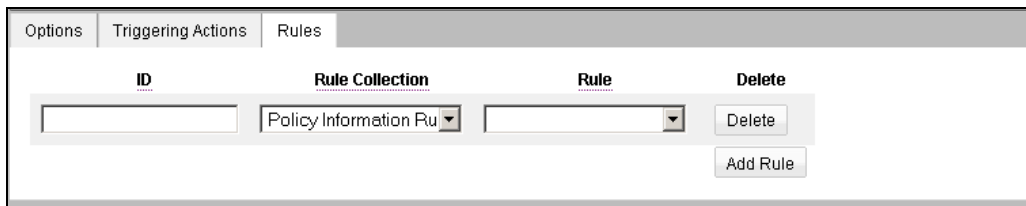
Next, enter the triggering actions by clicking on 'Add Triggering Action'. Each action must have its own ID that must be unique within the Page Library. In the actions field, you can start typing a few letters to get help for the actions that are available. A common option will be 'ContinueSave'.



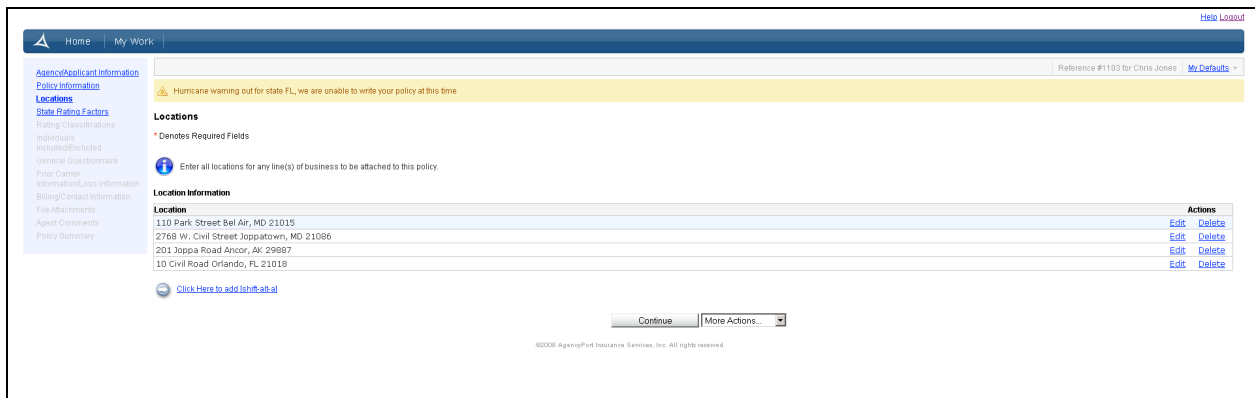
**Note:** The list of available actions are: *Display, Continue, SaveAndExit, Save, Finish, ContinueSaveAndExit, ContinueSave, RosterDisplay, RosterAdd, RosterCopy, RosterEdit, RosterAddCopyEdit, RosterDelete, RosterContinue, RosterSaveAndExist, RosterContinueSaveAndExit and RosterAllExceptDelete.*

Enter all the rules that should run by either selecting a 'Rule Collection' or a single 'Rule'.  
If you select the Rule Collection and leave the Rule unselected, then all the rules in the rule collection will be executed.

You can click on 'Add Rule' if you want to add more rules to be run.



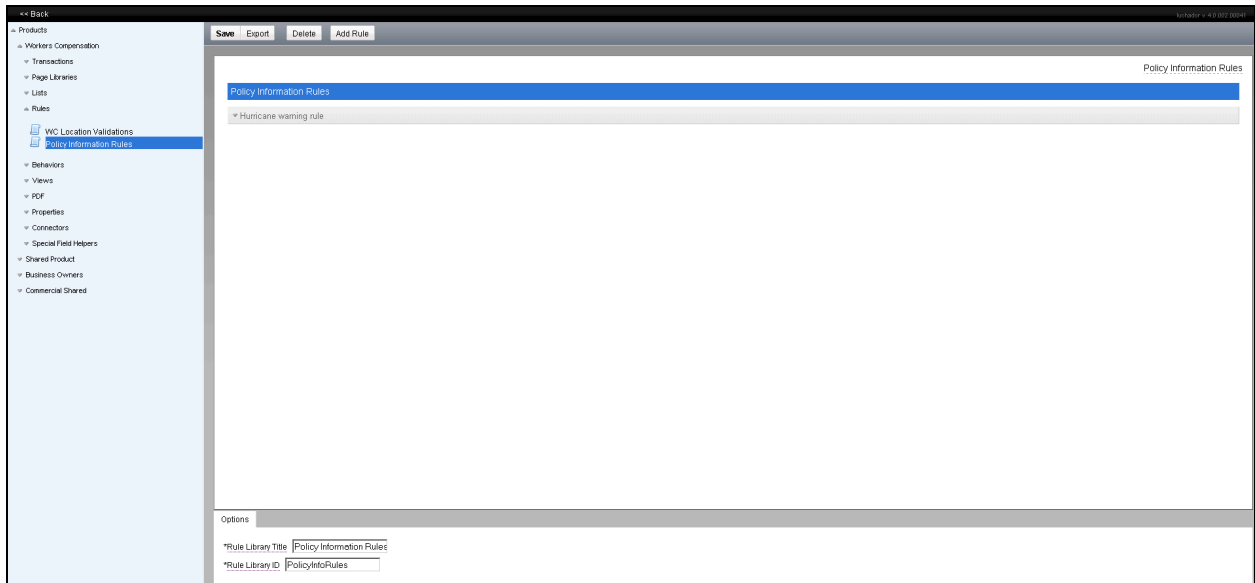
- Create a work item and on the policy information page select "Massachusetts" for controlling state. Fill the other mandatory information and hit continue. You should be able to see the warning message on the next screen.



**Exercise 2: Modify the rule written in Exercise 1 to add a variable to the message that is displayed.**

Requirement: If the risk location state is in one of Massachusetts or Rhode Island display a message  
“Hurricane warning out for state <selected controlling state>, we are unable to write your policy at this time”

1. Bring up the “Policy Information Rules” rule collection by selecting the rule on the left side navigation menu.



Policy Information Rules

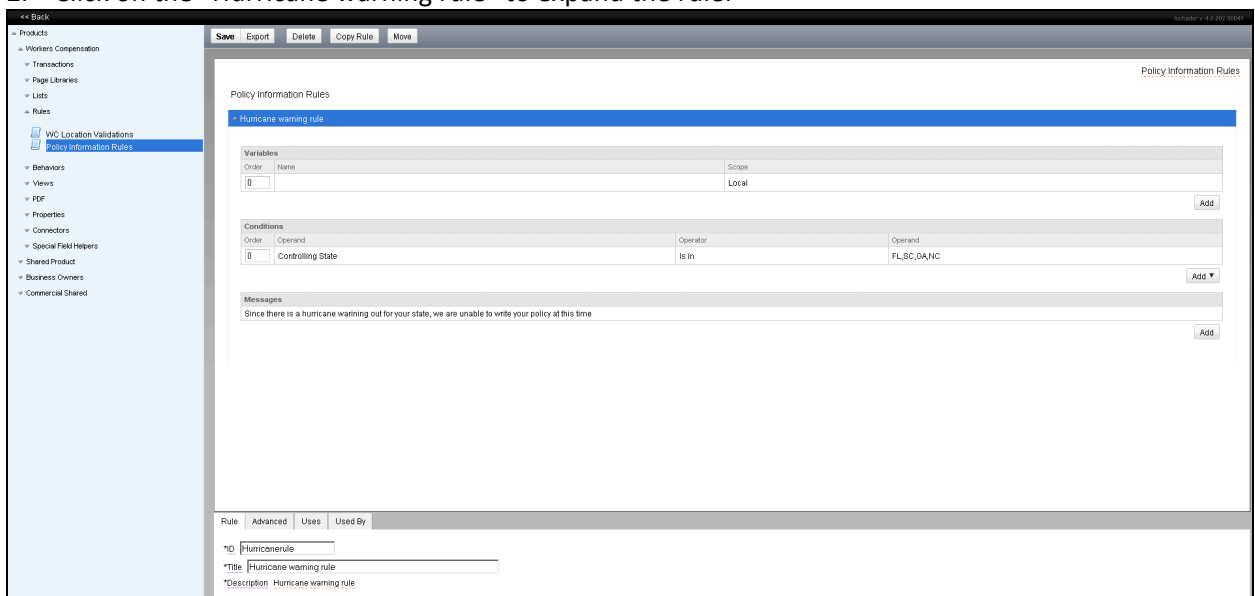
Hurricane warning rule

Options

\*Rule Library Title Policy Information Rules

\*Rule Library ID PolicyInfoRules

2. Click on the “Hurricane warning rule” to expand the rule.



Policy Information Rules

Hurricane warning rule

Order	Name	Scope
1	Controlling State	Local

Add

Order	Operand	Operator	Operand
1	Controlling State	Is in	FL,SC,PA,NC

Add

Messages

Since there is a hurricane warning out for your state, we are unable to write your policy at this time

Add

Rule Advanced Uses Used By

\*ID Hurricane rule

\*Title Hurricane warning rule

\*Description Hurricane warning rule

3. Click “Add” under the variables table to add a variable.  
Add the following:

Name: ControllingState  
 Scope: Local  
 Type: Field  
 Page: Policy Information  
 Fieldset: PolicyInformation  
 Field: Controlling State

**Hurricane warning rule**

Order	Name	Scope
0	ControllingState	Local

Options | **Advanced**

\*Name:   
 \*Scope:   
 \*Type:   
 \*Page:   
 \*Fieldset:   
 \*Field:

- Select the message under the messages table  
 Enter the message using the variable  
 “Hurricane warning out for state \${ControllingState}, we are unable to write your policy at this time”

**Messages**

Hurricane warning out for state \${ControllingState}, we are unable to write your policy at this time

**Messages**

\*Display Message  
 Hurricane warning out for state \${ControllingState}, we are unable to write your policy at this time

\*Message Severity:   
 \*Show Multiple Messages:   
 Message Class: [\(click to enter a value\)](#)

- Save the rule by clicking the save button on the menu bar  
 Bring up a work item and select controlling state to be one of MA or RI and you should see the warning message when you hit continue.

**Home** | **My Work** | [Help](#) | [Logout](#)

**Agency/Policy Information**  
 Policy Information  
**Locations**  
 State Rating Factors  
 Rating Classifications  
 Individuals  
 Included/Excluded  
 General Exclusions  
 Prior Carrier  
 Information/loss information  
 Billing/Contact Information  
 File Attachments  
 Agent Comments  
 Policy Summary

**Locations**

\* Denotes Required Fields

Enter all locations for any line(s) of business to be attached to this policy.

**Location Information**

Location	Actions
110 Park Street Bel Air, MD 21015	<a href="#">Edit</a> <a href="#">Delete</a>
2768 W. Civil Street Joppatown, MD 21086	<a href="#">Edit</a> <a href="#">Delete</a>
201 Joppa Road Ancon, AK 29887	<a href="#">Edit</a> <a href="#">Delete</a>
10 Civil Road Orlando, FL 21018	<a href="#">Edit</a> <a href="#">Delete</a>

[Click Here to add job#-all](#)

[Continue](#) | [More Actions...](#)

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### Exercise 3:

#### Requirement:

At least one location should be from the Controlling State. Display an error message “At least one location should be from controlling state”.

#### Fields:

Location State: `/WorkCompPolicyQuoteInqRq/Location/Addr/StateProvCd`

Controlling State: `/WorkCompPolicyQuoteInqRq/Comm1Policy/ControllingStateProvCd`

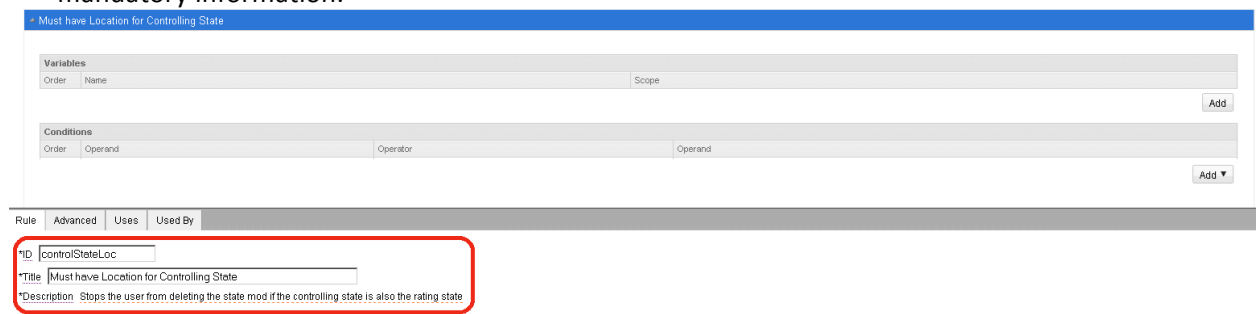
#### Approach:

Since rules generate messages when a set of conditions are met, the condition to be met here is NOT (Location state = Controlling state).

*Note:* One rule of thumb that can be followed is if the rule is “*at least one of*” kind of a rule then you don’t need to loop over the aggregates.

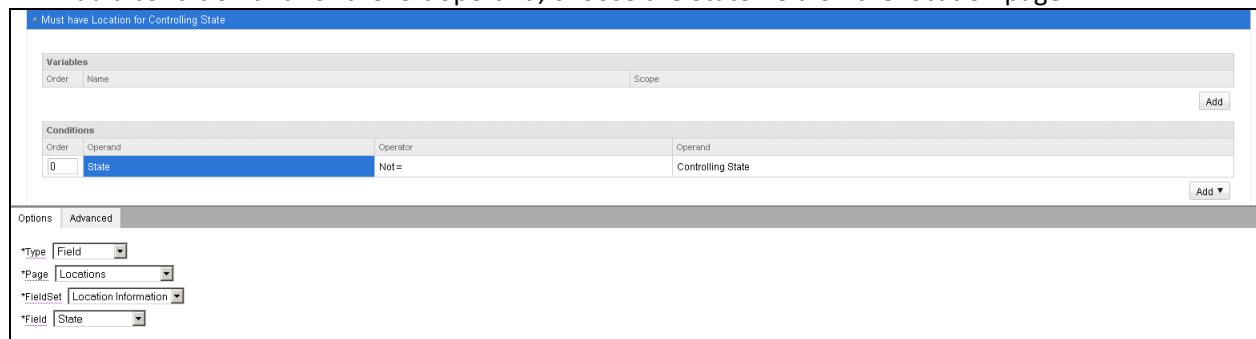
#### Steps to write this rule:

1. Create a new rule within the “Workers Comp Validation” rule collection and provide the mandatory information.



The screenshot shows the configuration for a rule titled "Must have Location for Controlling State". The rule ID is "controlStateLoc". The title is "Must have Location for Controlling State". The description is "Stops the user from deleting the state mod if the controlling state is also the rating state". The rule is currently in the "Rule" tab, with other tabs for "Advanced", "Uses", and "Used By".

2. Add a condition and for the left operand, choose the State field on the location page.



The screenshot shows the configuration for the rule "Must have Location for Controlling State". The "Conditions" section is active, showing a condition with the left operand "State" and the operator "Not =". The right operand is "Controlling State". The "Options" tab is also visible, showing the rule type as "Field", the page as "Locations", the field set as "Location Information", and the field as "State".

3. For the Operator choose “NOT =”

**Must have Location for Controlling State**

Variables		
Order	Name	Scope

Add

Conditions		
Order	Operand	Operator
0	State	Not =
		Controlling State

Add

Options

\*Operator: Not =

4. For the right operand choose the controlling state field on the Policy Information page.

**Must have Location for Controlling State**

Variables		
Order	Name	Scope

Add

Conditions		
Order	Operand	Operator
0	State	Not =
		Controlling State

Add

Options

Advanced

\*Type: Field

\*Page: Policy Information

\*FieldSet: Policy Information

\*Field: Controlling State

5. Add a message

**Messages**

There must be a Location entered for the Controlling State.

Add

All Locations must have a Class code

Messages

\*Display Message: There must be a Location entered for the Controlling State.

\*Message Severity: Error

\*Show Multiple Messages: YES

Message Class: (click to enter a value)

6. Save the rule

7. Ensure this rule will fire by adding a Process-side Connector containing this rule to the Location page.

8. Open a work item and click continue on Locations page without adding location for the controlling state. Error message should be displayed.

Home | My Work | Toolkit | Settings | Users

Agency/Applicant Information | Policy Information | **Locations** | State Rating Factors | Rating Classifications | Individuals | Included/Excluded | General Questionnaire | Price Center | Information/Loss Information | Billing/Contact Information | File Attachments | Agent Comments | Policy Summary

Reference #1124 for Best Applicant | My Defaults

There must be a Location entered for the Controlling State.

**Locations**

\* Denotes Required Fields

Enter all locations for any line(s) of business to be attached to this policy.

**Location Information**

Location	Actions
1 main st Boston, MA 02110	Edit   Delete

Click Here to add to all at

Continue | More Actions...

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