**Web Service**

**“New Business”**

Detailed Technical Specification

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**Document Control Information**

**Versions**

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| 1.0 | Update | Krasen Karagyozov | 12.10.2017 |
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| 3.0 | Update | Krasen Karagyozov | 23.08.2018 |
| 4.0 | Update | Petya Kaisheva | 01.10.2019 |
|  |  |  |  |

**References**

|  |  |  |
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| Document | Version | Location/Description |
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**Introduction**

This document and all the rules defined in it apply to GraphTalk A.I.A version 4.40 delivered to LaLux. Any customization of these activities in order to support LaLux’s requirements will also be described (where applicable) on the following pages.

This document is intended for:

* A.I.A business analyst and technical architects
* A.I.A architects who will produce technical designs for the related developments.
* A.I.A and Client test teams, which should verify and validate that the system functions according to what was agreed in the scope

1. Requirements Overview
   1. Scope

The present document describes the “NewBusines” Web Service which will be used to transfer the proposition, defined in “PROdige” web application, into LaLux back Office system- A.I.A. as contract. The service will correspond to AIA business process “New Business”.

The service will launch and stop on “Premium Adjustment” task in A.I.A. business activity “New Business”. In case of error the web service will return an error code and description of the error occurred.

In both cases – success or fail a pending activity will be available in AIA to be finalized or aborted by back office user.

Only creation of contract for product “easy-PROTECT” (ID = EASYPROPART).

The service functionality will include creation of contracts for the following risks:

LOT 1:

* Automobile,
* Camping car,
* Camionnette,
* Machine,
* Cyclomoteur,
* Motocyclette,
* Caravane,
* Remorque,
* Home3 (habitation individuelle),
* Immoprotect (immeuble),
* Responsabilité civile – type insured Responsabilité civile familiale

LOT 1.2:

* Services easy-PROTECT, with Insured Types :
* Discover
* Services à la personne
* Assistance annuelle
* Responsabilité civile – type insured Responsabilité civile chasse
* Tous risques
* Accident
* Confort
* Performance

Protection Juridique:

* Services easy-PROTECT, with Insured Types :
* Integral Legal protection
  1. Business requirements

|  |  |  |  |
| --- | --- | --- | --- |
| *#* Req | Business Process | Requirement Title | Requirement Description |
|  | New Business |  | The web service will cover only listed in Scope section product and types of risks. |
|  | New Business |  | Execution of the web service will not perform automatic validation of corresponding activity “New Business”. |
|  | New Business |  | In case of successful execution of the service as result a pending activity New business should remain in A.I.A. on step Premium Adjustment. |
|  | New Business |  | In case of unsuccessful execution of the web service as result a pending activity should remain in A.I.A. on the step where error occurs. Web service will return the error to requester application. |

* 1. Out of Scope of this Technical Design

|  |  |  |  |
| --- | --- | --- | --- |
| *#* Req | Business Process | Requirement Title | Requirement Description |
|  | New Business |  | Documents management will be out of scope for this web service. |
|  | New Business |  | Information requests will be out of scope for this web service. |
|  | New Business |  | Validation stamps management will be out of scope for this service. |
|  | New Business |  | The products and risks not listed in section Scope will be out of scope for this web service. |

1. AIA Web Service – “NewBusiness”
   1. Web Service ID

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| ID | Name | From | To | Mode | Media | **Volume Average per day** | **Volume Maximum per day** |
| NewBusiness | New Business | Customer PROdige | GT A.I.A | On line | Web service | 95 | N/A |

* 1. AIA Business Activity

Business activity “New Business”.

* 1. Triggering Event

This web service will be triggered by web application “PROdige”. At the moment when client decide to sign offered proposal, the Lalux commercial is sending this proposal to be stored in A.I.A. database as contract.

* 1. Input Data Flows

Input data description

|  |  |  |
| --- | --- | --- |
| **Parameter** | **Description** | **Mandatory** |
| Environment | Technical parameter (user, date, profiles, etc. ) describing an environment. | yes |
| WMActivity | Technical parameter describing activity | yes |
| Contract | Data Dictionary entity describing different attributes and sub entities necessary for creation of contract in A.I.A. | yes |

The input parameters are described as part of each AIA activity Step



* 1. Output Data Flows

Output data description

|  |  |
| --- | --- |
| **Parameter** | **Description** |
| ReturnStatus | Technical parameter (web service status, error list, etc. ) in entity WMStatus of Data Dictionary |
| WMActivity | Technical Parameter describing activity |



* 1. Exception management

N/A

* 1. Web Service Parameterisation

|  |  |
| --- | --- |
| Identifier | NewBusiness |
| Label | New Business |
| Service Type | Create/Update complex web services (activity mode) |
| WM Profile | TBD |

* 1. Web service WSDL



* 1. Test Cases

Here is the list of test cases related to this Web Service.

|  |  |  |  |
| --- | --- | --- | --- |
| **Label** | **Description** | **Input XML Flow** | **Expected XML response** |
| ***TestCase1*** | *Pre-requirement* – existing in AIA person with postal address and bank account.  *Test* – creation contract with multiple risks – one for each of risks included is scope of the project for LOT1.  *Expected result -* WM\_SUCCESS – pending activity for New Business. |  |  |
| ***TestCase2*** | *Pre-requirement* – existing in AIA person with postal address and bank account and created cover note for each of following risks - Automobile, Camping car, Camionnette, Machine, Cyclomoteur, Motocyclette, Caravane, and Remarque.  *Test –* creation of contract with multiple risks, each risk is based on cover note.  *Expected result -* WM\_SUCCESS – pending activity for New Business. |  |  |
| ***TestCase3*** | *Pre-requirement* – existing in AIA person with postal address and bank account and created cover note for each of following risks - Automobile, Camping car, Camionnette, Machine, Cyclomoteur, Motocyclette, Caravane, and Remarque.  *Test –* creation of contract with multiple risks, each risk is based on cover note and additional data for the risk provided (Usage, Driver etc.).  *Expected result -* WM\_SUCCESS – pending activity for New Business. |  |  |
| ***TestCase4*** | *Pre-requirement* – existing in AIA person with postal address and bank account.  *Test* – creation contract with risks Automobile – different coverages and premium adjustment combinations, risks creation on effective date and in future.  *Expected result -* WM\_SUCCESS – pending activity for New Business. |  |  |
| ***TestCase5*** | *Pre-requirement* – existing in AIA person with postal address and bank account.  *Test* – creation contract with risks Automobile – different kinds for this risk.  *Expected result -* WM\_SERVICE\_FAILED - pending activity on risk description task for the risk with message " Les genres Ambulance et Voiture (sapeurs-pompiers) ne sont pas possibles”. |  |  |
| ***TestCase6*** | *Pre-requirement* – existing in AIA person with postal address and bank account.  *Test* – creation contract with risks Automobile – al risks with effective date in future compare to effective date for the New Business activity.  *Expected result -* WM\_SERVICE\_FAILED - pending activity on risk description task for the risk with message “At least one risk should be active - Deactivation of all contract risks should be managed by Cancel Contract or Suspend contract activity” |  |  |
| ***TestCase7*** | *Pre-requirement* – existing in AIA person with postal address and bank account.  *Test* – creation contract with risks Camping car – different coverages and premium adjustment combinations, risks creation on effective date and in future.  *Expected result -* WM\_SUCCESS - pending activity on step Premium Adjustment, having 2 risks loaded. |  |  |
| ***TestCase8*** | *Pre-requirement* – existing in AIA person with postal address and bank account.  *Test* – creation contract with risks Camping car – no data for coverages to be selected  *Expected result -* WM\_SERVICE\_FAILED with message - No coverages selected. |  |  |
| ***TestCase9*** | *Pre-requirement* – existing in AIA person with postal address and bank account.  *Test* – creation contract with risks Caravane – different coverages and premium adjustment combinations, risks creation on effective date and in future.  *Expected result -* WM\_SUCCESS - pending activity on step Premium Adjustment, having 2 risks loaded. |  |  |
| ***TsetCase10*** | *Pre-requirement* – existing in AIA person with at least postal address and bank account.  *Test* – creation contract with risks Machine – different kinds, coverages and premium adjustment combinations, risks creation on effective date and in future.  *Expected result -* WM\_SUCCESS - pending activity on step Premium Adjustment, having 6 risks loaded. |  |  |
| ***TestCase11*** | *Pre-requirement* – existing in AIA person with at least postal address and bank account.  *Test* – creation contract with risks Motorcycle – different kinds, coverages and premium adjustment combinations, risks creation on effective date and in future.  *Expected result -* WM\_SUCCESS - pending activity on step Premium Adjustment, having 4 risks loaded. |  |  |
| ***TestCase12*** | *Pre-requirement* – existing in AIA person with at least postal address and bank account.  *Test* – creation contract with risks Moped – different kinds, coverages and premium adjustment combinations, risks creation on effective date and in future.  *Expected result -* WM\_SUCCESS - pending activity on step Premium Adjustment, having 5 risks loaded. |  |  |
| ***TestCase13*** | *Pre-requirement* – existing in AIA person with at least postal address and bank account.  *Test* – creation contract with risks Trailer – different kinds, coverages and premium adjustment combinations, risks creation on effective date and in future.  *Expected result -* WM\_SUCCESS - pending activity on step Premium Adjustment, having 4 risks loaded. |  |  |
| ***TestCase14*** | *Pre-requirement* – existing in AIA person with at least postal address and bank account.  *Test* – creation contract with risks Van – different coverages and premium adjustment combinations, risks creation on effective date and in future.  *Expected result -* WM\_SUCCESS - pending activity on step Premium Adjustment, having 4 risks loaded. |  |  |
| ***TestCase15*** | *Pre-requirement* – existing in AIA person with at least postal address and bank account.  *Test* – creation contract with risks Van – different kinds, coverages and premium adjustment combinations, risks creation on effective date and in future.  *Expected result -* WM\_SERVICE\_FAILED - pending activity on risk description task for the risk with message “Les genres Ambulance, Dépanneuse, Véhicule d'incendie, Véhicule de secours ou Véhicule forain ne sont pas possibles’. |  |  |
| ***TestCase16*** | *Pre-requirement* – existing in AIA person with at least postal address and bank account.  *Test* – creation contract with risks Habitation individuelle – different details, coverages and premium adjustment combinations, risks creation on effective date and in future.  *Expected result -* WM\_SUCCESS - pending activity on step Premium Adjustment, having 4 risks loaded. |  |  |
| ***TestCase17*** | *Pre-requirement* – existing in AIA person with at least postal address and bank account.  *Test* – creation contract with risks Habitation individuelle – coverages excluding each other  *Expected result -* WM\_SERVICE\_FAILED - pending activity on Coverages task with message - *“Building damages can't be subscribed because of already existing coverages”.* |  |  |
| ***TestCase18*** | *Pre-requirement* – existing in AIA person with at least postal address and bank account.  *Test* – creation contract with risks Imeuble – different details, coverages and premium adjustment combinations, risks creation on effective date and in future.  *Expected result -* WM\_SUCCESS - pending activity on step Premium Adjustment, having 2 risks loaded. |  |  |
| ***TestCase19*** | *Pre-requirement* – existing in AIA person with at least postal address and bank account.  *Test* – creation contract with risks Civil Liability – different details, coverages and premium adjustment combinations, risks creation on effective date and in future.  *Expected result -* WM\_SUCCESS - pending activity on step Premium Adjustment, having 2 risks loaded. |  |  |
| ***TestCase20*** | *Pre-requirement* – existing in AIA person without postal address and with bank account.  *Test* – creation contract for any risk from scope of LOT1 – different details, coverages and premium adjustment combinations, risks creation on effective date and in future.  *Expected result -* WM\_SERVICE\_FAILED - pending activity on Contract parties task with message for missing postal address |  |  |
| ***TestCase21*** | *Pre-requirement* – existing in AIA person with postal address and without bank account.  *Test* – creation contract for any risk from scope of LOT1 – different details, coverages and premium adjustment combinations, risks creation on effective date and in future.  *Expected result -* WM\_SERVICE\_FAILED - pending activity on Regular Payment task with message for invalid IBAN. |  |  |
| ***TestCase22*** | *Pre-requirement* – existing in AIA person with postal address and bank account.  *Test* – creation contract with multiple risks – one for each of risks and insured type for risk included is scope of the project for LOT1.2.  *Expected result -* WM\_SUCCESS – pending activity for New Business with 7 risks loaded. |  |  |
| ***TestCase23*** | *Pre-requirement* – existing in AIA person with postal address and bank account.  *Test* – creation contract with risk Service Easy-Protect for all insured types – different details and coverages. Risks creation on effective.  *Expected result -* WM\_SUCCESS - pending activity on step Premium Adjustment, having 3 risks loaded. |  |  |
| ***TestCase24*** | *Pre-requirement* – existing in AIA person with postal address and bank account.  *Test* – creation contract with risk Accident - insured type Accident Comfort – different details and coverages. Risks creation on effective date.  *Expected result -* WM\_SUCCESS - pending activity on step Premium Adjustment, having 4 risks loaded. |  |  |
| ***TestCase25*** | *Pre-requirement* – existing in AIA person with postal address and bank account.  *Test* – creation contract with risk Accident - insured type Accident Performance – different details and coverages. Risks creation on effective date.  *Expected result -* WM\_SUCCESS - pending activity on step Premium Adjustment, having 4 risks loaded. |  |  |
| ***TestCase26*** | *Pre-requirement* – existing in AIA person with postal address and bank account.  *Test* – creation contract with multiple risks – one for each of risks and insured type for risk included is scope of the project for LOT1.2.  *Expected result -* WM\_SERVICE\_FAILED - message for “Wrong input on the risk coefficients »  Risk described in risk 1 loaded, risk described in risk 2 – trigger fatal and left pending activity in Create Risk secondary activity, on task Coverages. Risk described in Risk 3 and 4 – not loaded at all. |  |  |
| ***TestCase27*** | *Pre-requirement* – existing in AIA person with postal address and bank account.  *Test* – creation contract with multiple risks – one for each of risks – Automobile, Camping Car, Civil Liability (Family) and Services EASYPROTECT (Integral Legal Protection). For each of the risks define minimum required data and select the new coverages(with extensions) – Integral Legal Protection. For risk Services EASYPROTECT (Integral Legal Protection) select all available coverages except the one with Risk Code = E0165. For Ref Element "PJ\_intgrl", on coverage E0160, select one of the 2 applicable values – (1764.70; 5882.35)  *Expected result -* WM\_SUCCESS – pending activity for New Business. |  |  |
| ***TestCase28*** | *Pre-requirement* – existing in AIA person with postal address and bank account.  *Test* – creation contract with risk Services EASYPROTECT (Integral Legal Protection). Set parameter **Client with RC Familiale = No**. Select all coverage except the one with Risk Code = E0160. No Input data for Reference elements is required.  *Expected result -* WM\_SUCCESS – pending activity for New Business. |  |  |
| ***TestCase29*** | *Pre-requirement* – existing in AIA person with postal address and bank account.  *Test* – creation contract with risk Automobile. Define minimum required data for the risk and select all coverages “Legal Protection” and “Integral Car Legal Protection”  *Expected result -* WM\_SERVICE\_FAILED – pending activity for New Business on step “Coverages” with message saying both coverages are excluded. |  |  |
| ***TestCase30*** | *Pre-requirement* – existing in AIA person with postal address and bank account.  *Test* – creation contract with risk Camping Car. Define minimum required data for the risk and select all coverages “Legal Protection” and “Integral Car Legal Protection”  *Expected result -* WM\_SERVICE\_FAILED – pending activity for New Business on step “Coverages” with message saying both coverages are excluded. |  |  |
| ***TestCase31*** | *Pre-requirement* – existing in AIA person with postal address and bank account.  *Test* – creation contract with risk Civil Liability (Family). Define minimum required data for the risk and select all coverages “Legal Protection” and “Family Legal Protection”  *Expected result -* WM\_SERVICE\_FAILED – pending activity for New Business on step “Coverages” with message saying both coverages are excluded. |  |  |

1. Business Activity – “New Business”
3. 1. Steps
      1. Step « Activity Request»

#### Description

Activity request task in context of web service is used to initiate the corresponding business activity as web service. On this step distributor, product and contract owner must be selected.

#### Updates

Description of classes, methods and fields updated as part of current implementation

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Element name** | **Type** | **Update/New** | **Comments** | **Standard/**  **Specific** |
| $service:cc\_new\_business\_cmpnnt | Class | New | Generated |  |
| describe\_input/2 | Method | New | Generated |  |
| describe\_xml/2 | Method | New | Generated |  |
| $banewbus:cc\_new\_business\_cmpnnt | Class | Update |  | Specific |
| describe\_in/2 | Method | Update | Generated | Standard |
| describe\_xml/2 | Method | New | Generated |  |
| get\_business\_service\_class/2 | Method | New | Generated |  |
| get\_scndry\_task\_ls/0 | Method | Update | Generated | Standard |
| input\_parameter/3 | Method | Update | Generated | Standard |
| input\_parameter\_xml/2 | Method | Update | Manual |  |

The Type can be – class, method, field, enumerate … etc.

#### Data Dictionary

N/A

#### Task Input Data

The details of the input parameters are described in the following table below.

|  |  |  |  |
| --- | --- | --- | --- |
| **Tag** | **Description** | **Mandatory** | **Type** |
| /Contract | Basic information about a contract: product, dates, situation, tax plan |  |  |
| /ProductIdentifier | The product identifier whose is defining the contract. | Yes | String |
| /RoleList | The list of role played by a party for a contract | Yes |  |
| /PartyRole | A role is a function or position played by a party. A role is a relationship between a party and a business object, especially a contract.  A party role denotes a legal intervening party on the contract, or a business role (distributor, administrator, etc.). | Yes |  |
| /RoleType | A code identifying a primary party role | Yes | enum |
| /PartyType | The characteristics of a party which is independent of its role. | Yes | enum |
| /DistributorDetails | Additional Information when RoleType is distributor. | Yes |  |
| /Identifier | Identifier of the distributor | Yes | string |
| /Person | The related person | Yes |  |
| /FirstName | First name of the person | Yes | String |
| /LastName | Last name of the person | Yes | string |
| /BirthDate | Date of birth of the person | Yes | date |
| /PersonTitle | Courtesy title of a person | Yes | enum |
| /ClientNumber | Primary number of the person | No | string |
| /ClientNumber2 | A secondary client number defined from an external application hosting a slave database. | No | string |
| /Organization |  | No |  |
| /LegalName | The legal name of an organization | Yes | String |
| /OrtanizationTitle | The title of the organization | Yes | String |
| /SIRETNumber | The additional registration number for a corporate entity. | Yes | String |
| /ClientNumber | A primary organization number. | No | String |
| /ClientNumber2 | A secondary client number defined from an external application hosting a slave database. | No | String |

* + 1. Step « Contract Parties »

#### Description

This step is used to define owner or third party, their postal, electronic and telecom addresses and relation between different parties.

#### Updates

Description of classes, methods and fields updated as part of current implementation

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Element name** | **Type** | **Update/New** | **Comments** | **Standard/**  **Specific** |
| $service:contract\_add\_owner | Class | Update |  | Standard |
| describe\_input/2 | Method | New | Generated |  |
| describe\_xml/2 | Method | New | Generated |  |
| describe\_input/1 | Method | New | Generated |  |
| describe\_output/1 | Method | New | Generated |  |
| $service:person\_add\_relations | Class | Update |  | Standard |
| describe\_input/2 | Method | New | Generated |  |
| describe\_xml/2 | Method | New | Generated |  |
| describe\_input/1 | Method | New | Generated |  |
| describe\_output/1 | Method | New | Generated |  |

The Type can be – class, method, field, enumerate … etc.

#### Data Dictionary

|  |  |  |  |
| --- | --- | --- | --- |
| **EnumerationType** | **ValueDomain** | **Reference** | **STANDARD/SPECIFIC** |
| RelationshipType | spouse\_spouse("CONJOINT"=  "Spouse / Spouse") | nothing | SPECIFIC |
| RelationshipType | parent\_child("PARENT\_ENF"=  "Parent / Child") | nothing | SPECIFIC |
| RelationshipType | partned\_partner("CONCUBIN"=  "Partner / Partner") | nothing | SPECIFIC |
| RelationshipType | sister\_brother("SOEFRE"=  "Sister / Brother") | nothing | SPECIFIC |
| RelationshipType | sister\_sister("SOESOE"=  "Sister / Sister") | nothing | SPECIFIC |
| RelationshipType | brpther\_brpther("FREFRE"=  "Brother / Brother") | nothing | SPECIFIC |
| RelationshipType | relationship\_relationship("LINPRT"=  "Relationship / Relationship") | nothing | SPECIFIC |
| RelationshipType | represented\_representative("REPRESENTE"="Represented by / Representative") | nothing | SPECIFIC |
| RelationshipType | correspondant\_employer("CRSP"=  "Correspondant / Employer") | nothing | SPECIFIC |
| RelationshipType | company\_key\_employee("ENTCOL"=  "Company / Key employee") | nothing | SPECIFIC |
| RelationshipType | company\_trade\_union("102"=  "Company / Trade Unionr") | nothing | SPECIFIC |
| RelationshipType | company\_establishement("ESTABLISH"=  "Company / Establishement") | nothing | SPECIFIC |
| RelationshipType | head\_office\_branch("HOB"=  "Head Office / Branch ") | nothing | SPECIFIC |
| RelationshipType | company\_company("ENTENT"=  "Company / Company ") | nothing | SPECIFIC |

#### Task Input Data

The details of the input parameters are described in the following table below.

|  |  |  |  |
| --- | --- | --- | --- |
| **Tag** | **Description** | **Mandatory** | **Type** |
| /RoleList | The list of role played by a party for a contract | Yes |  |
| /PartyRole | A role is a function or position played by a party. A role is a relationship between a party and a business object, especially a contract.  A party role denotes a legal intervening party on the contract, or a business role (distributor, administrator, etc.). | Yes |  |
| /RoleType | A code identifying a primary party role | Yes | enum |
| /PartyType | The characteristics of a party which is independent of its role. | Yes | enum |
| /Organization |  | No |  |
| /LegalName | The legal name of an organization | Yes | String |
| /OrtanizationTitle | The title of the organization | Yes | String |
| /SIRETNumber | The additional registration number for a corporate entity. | Yes | String |
| /ClientNumber | A primary organization number. | No | String |
| /ClientNumber2 | A secondary client number defined from an external application hosting a slave database. | No | String |
| /PhoneAddressList |  | No |  |
| /PhoneAddress | The phone address owned by the party | No |  |
| /CountryCode | The county code of postal address | Yes | string |
| /AddressCategory | A code identifying the category of the address | Yes | enum |
| /PhoneNumber | The telephone number. | Yes | String |
| /PhoneType | The type of telephone number. | Yes | Enum |
| /Preferred | Identifies if the telephone address is a preferred one. | Yes | Enum |
| /PostalAddressList | The list of address owned by the party | Yes |  |
| /PostalAddress | The address owned by the party | Yes |  |
| /CountryCode | The county code of postal address | Yes | String |
| /PostalCode | The postal code of the location of the party | Yes | String |
| /CityName | The name of the city of the postal address. | Yes | String |
| /Street | The name of the street of the postal address | Yes | String |
| /StreetNumber | The number of the street of the postal address. | Yes | String |
| /StreetNumber2 | Second street number, extra information. | Yes | String |
| /AddressCategory | A code identifying the category of the address | Yes | Enum |
| /Preferred | Identifies if the postal address is a preferred one. | Yes | Enum |
| /EMailAddressList | The list of email address owned by the party | No |  |
| /EMailAddress | The email address owned by the party | No |  |
| /AddressCategory | A code identifying the category of the address | Yes | Enum |
| /Preferred | Identifies if the email address is a preferred one. | Yes | Enum |
| /Text | The location of the electronic mailbox of the party | Yes | String |
| /Type | Address type, e-mail address or web site address | Yes | Enum |
| /RelationshipList | The list of relationship that the party is related to. | No |  |
| /Relationship | The relationship that the party is related to | No |  |
| /Domain | The domain of the relationship | Yes | Enum |
| /Type | The type of the relationship that the party is related to. | Yes | Enum |
| /Person | The related person. (see below for description of the entity) | No |  |
| /Organization | The related person. (see above for description of the entity) | No |  |
| /Person | The related person | Yes |  |
| /FirstName | First name of the person | Yes | String |
| /LastName | Last name of the person | Yes | string |
| /BirthDate | Date of birth of the person | Yes | date |
| /PersonTitle | Courtesy title of a person | Yes | enum |
| /ClientNumber | Primary number of the person | No | string |
| /ClientNumber2 | Secondary number of the person | No | string |
| /PhoneAddressList | The list of phone address owned by the party | No |  |
| /PhoneAddress | The phone address owned by the party | No |  |
| /CountryCode | The county code of postal address | Yes | string |
| /AddressCategory | A code identifying the category of the address | Yes | enum |
| /PhoneNumber | The telephone number. | Yes | String |
| /PhoneType | The type of telephone number. | Yes | Enum |
| /Preferred | Identifies if the telephone address is a preferred one. | Yes | Enum |
| /PostalAddressList | The list of address owned by the party | No |  |
| /PostalAddress | The address owned by the party | No |  |
| /CountryCode | The county code of postal address | Yes | String |
| /PostalCode | The postal code of the location of the party | Yes | String |
| /CityName | The name of the city of the postal address. | Yes | String |
| /Street | The name of the street of the postal address | Yes | String |
| /StreetNumber | The number of the street of the postal address. | Yes | String |
| /StreetNumber2 | Second street number, extra information. | Yes | String |
| /AddressCategory | A code identifying the category of the address | Yes | Enum |
| /Preferred | Identifies if the postal address is a preferred one. | Yes | Enum |
| /EMailAddressList | The list of email address owned by the party | No |  |
| /EMailAddress | The email address owned by the party | No |  |
| /AddressCategory | A code identifying the category of the address | Yes | Enum |
| /Preferred | Identifies if the email address is a preferred one. | Yes | Enum |
| /Text | The location of the electronic mailbox of the party | Yes | String |
| /Type | Address type, e-mail address or web site address | Yes | Enum |
| /RelationshipList | The list of relationship that the party is related to. | No |  |
| /Relationship | The relationship that the party is related to | No |  |
| /Domain | The domain of the relationship | Yes | Enum |
| /Type | The type of the relationship that the party is related to. | Yes | Enum |
| /Person | The related person. (see above for description of the entity) | No |  |
| /Organization | The related person. (see above for description of the entity) | No |  |

* + 1. Step « Contract Information »

#### Description

This step is used to define specific information about contract duration, dates and other general contract information.

#### Updates

Description of classes, methods and fields updated as part of current implementation

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Element name** | **Type** | **Update/New** | **Comments** | **Standard/**  **Specific** |
| $service:contract\_add\_infos | Class | Updated |  | Standard |
| describe\_input /2 | Method | New | Generated |  |
| describe\_xml /2 | Method | New | Generated |  |
| describe\_output/1 | Method | New | Generated |  |
| describe\_input/1 | Method | New | Generated |  |

The Type can be – class, method, field, enumerate … etc.

#### Data Dictionary

N/A

#### Task Input Data

The details of the input parameters are described in the following table below.

|  |  |  |  |
| --- | --- | --- | --- |
| **Tag** | **Description** | **Mandatory** | **Type** |
| /Contract |  |  |  |
| /SignatureDate | Contract Signature date | No | Date |
| /Duration | Relevant when contract term is fixed term | No |  |
| /RenewalDay | Relevant when contract term is fixed term | No | String |
| /RenewalMonth | Relevant when contract term is fixed term | No | String |
| /RenewalTerm | Relevant when contract term is fixed term and type is yearly\_renewal | No | String |
| /Unit | Relevant when contract term is fixed term | No | enum |
| /Value | Relevant when contract term is fixed term | No | Integer |

* + 1. Step « Regular Payments »

#### Description

The step supports the whole scale of possibilities: Owner: Person or Organization and Third party payer: person or organization.

First, there is a check if the mode is person or organization so that it is clear where to get the correct information.

Then, the information for the billing is taken from the list. This step manages the 2 main cases:

* Regular payments with payment mode TUP (no bank account);
* Regular payments with payment mode DOM (bank account must be created).

In either of these cases, the frequency information is processed if available.

After that party information is gathered, in order to be able to be used in the way that the payment type requires it: For DOM mode- the info is used for IBAN owner; For TUP mode and third party payer – the postal addresses are created if described in the flow.

Next is processed the payment type information (TUP/DOM) if the incoming information is different from the one loaded by default.

If the party is already existing, then the bank information for them is gathered and the needed bank accounts are created (it is possible to create more than one bank account) – for DOM only.

Next there is a check if the IBAN of the billing is among the bank accounts of the payer. If not, the billing bank account is added and selected after that. (For DOM only)  
At the end the whole billing information is processed.

#### Updates

Description of classes, methods and fields updated as part of current implementation

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Element name** | **Type** | **Update/New** | **Comments** | **Standard/**  **Specific** |
| $babillng:cc\_bllngdtl\_dfntn | Class | Update |  | Specific |
| get\_business\_service\_class /2 | method | New | Generated |  |
| describe\_in /2 | method | Update | Generated | Standard |
| describe\_xml /2 | method | New | Generated |  |
| get\_action\_ls /0 | method | New | Generated |  |
| get\_scndry\_task\_ls /0 | method | Update | Generated | Standard |
| input\_parameter\_xml /2 | method | New | Manual |  |
| input\_parameter /3 | method | Update | Generated | Specific |
| verify\_parameter /0 | method | Update | Manual | Specific |
| $service:cc\_bllngdtl\_dfntn | Class | New | Generated |  |
| describe\_input /2 | method | New | Generated |  |
| describe\_xml /2 | method | New | Generated |  |

The Type can be – class, method, field, enumerate … etc.

#### Data Dictionary

N/A

#### Task Input Data

The details of the input parameters are described in the following table below.

|  |  |  |  |
| --- | --- | --- | --- |
| **Tag** | **Description** | **Mandatory** | **Type** |
| /Contract | Basic information about a contract: product, dates, situation, tax plan | Yes | List |
| /BillingList | List with Billings | Yes | List |
| /Billing | Scheduling rules for regular operations (including Billing rules) for a contract or an insured member | Yes |  |
| /PaymentType | The bank transaction used for the payment if the payment source is money input | Yes | enum |
| /BillReceiver | A code identifying the role type of the bill receiver also called the payer  Possible values are: third\_party, insured, owner | Yes | enum |
| /Frequency | A code identifying the frequency of billing | No | enum |
| /MainDueDay | This is a mandatory information for billing or regular premium which has not to be proceed on the underwriting date. | No | string |
| /MainDueMonth | This is a mandatory information for billing or regular premium which has not to been proceed on on the underwriting date. | No | string |
| /BankAccount | Billing bank account | No |  |
| /IBAN | BillingBank Account IBAN | Yes | string |
| /Payer | The payer or the bill receiver refers an existing PartyRole in the contract party role list | Yes |  |
| /PartyType | The characteristics of a party which is independent of its role. | Yes | enum |
| /Person | Payer person | No |  |
| /ClientNumber | Client Number of existing person | No | string |
| /PersonTitle | Mr/Mrs/Mms for new person | Yes | enum |
| /FirstName | New Person First Name | Yes | string |
| /LastName | New Person Last Name | Yes | string |
| /BirthDate | New Person Birth Date | Yes | date |
| /BankAccountList | Payers bank accounts | No | list |
| /BankAccount |  |  |  |
| /IBAN | Payer Bank Account IBAN | Yes | string |
| /PostalAddressList | Payer Postal Address List | No | list |
| /PostalAddress | Payer Postal Address Information |  |  |
| /CountryCode | Payer Postal Address Country Code | Yes | string |
| /CityName | Payer Postal Address City name | Yes | string |
| /Street | Payer Postal Address Street | Yes | string |
| /PostalCode | Payer Postal Address Postal Code | Yes | string |
| /StreetNumber | Payer Postal Address Street Number | Yes | string |
| /StreetNumber2 | Payer Postal Address Street Number2 | No | string |
| /Organization |  | No |  |
| /ClientNumber | A primary party number. | No | string |
| /ClientNumber2 | A secondary client number defined from an external application hosting a slave database. | No | string |
| /LegalName | The legal name of an organization | Yes | string |
| /OrganizationTitle | The title of the organization | No | string |
| /SIRETNumber | The additional registration number for a corporate entity | Yes | string |
| /BankAccountList | Payers bank accounts | No | list |
| /BankAccount |  |  |  |
| /IBAN | Payer Bank Account IBAN | Yes | string |
| /PostalAddressList | Payer Postal Address List | No | list |
| /PostalAddress | Payer Postal Address Information |  |  |
| /CountryCode | Payer Postal Address Country Code | Yes | string |
| /CityName | Payer Postal Address City name | Yes | string |
| /Street | Payer Postal Address Street | Yes | string |
| /PostalCode | Payer Postal Address Postal Code | Yes | string |
| /StreetNumber | Payer Postal Address Street Number | Yes | string |
| /StreetNumber2 | Payer Postal Address Street Number2 | No | string |

* + 1. Step « Risk Definition »

#### Description

This step is used to define the given risks with the appropriate coverages for them. The information is structured in lists. Every item in the list corresponds to a risk, with the appropriate coverages for it.

#### Updates

Description of classes, methods and fields updated as part of current implementation

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Element name** | **Type** | **Update/New** | **Comments** | **Standard/**  **Specific** |
| $banewbus:cc\_risk\_dfntn | Class | Updated |  | Specific |
| describe\_in /2 | Method | Updated | Generated | Specific |
| describe\_xml /2 | Method | New | Generated |  |
| get\_action\_ls /0 | Method | New | Generated |  |
| get\_business\_service\_class /2 | Method | New | Generated |  |
| get\_scndry\_task\_ls /0 | Method | Updated | Generated | Standard |
| input\_parameter /3 | Method | Updated | Generated | Specific |
| input\_parameter\_xml /2 | Method | New | Manual |  |
| get\_object\_key/4 | Method | New/Inherited | Manual | Standard |
| get\_scndry\_actvty\_ls/2 | Method | New/Inherited | Manual | Standard |
| request\_ws\_sa/4 | Method | New/Inherited | Manual |  |
| $service:cc\_risk\_dfntn | Class | New | Generated |  |
| describe\_input /2 | Method | New | Generated |  |
| describe\_xml /2 | Method | New | Generated |  |

The Type can be – class, method, field, enumerate … etc.

#### Data Dictionary

For details see [Secondary activity documents](#RiskModification) for each of the riss, ( section Step « Risk Definition »)







#### Task Input Data

The details of the input parameters are described in the following table below.

|  |  |  |  |
| --- | --- | --- | --- |
| **Tag** | **Description** | **Mandatory** | **Type** |
| /Contract | Basic information about a contract: product, dates, situation, tax plan | Yes | List |
| /MembershipList | List of memberships defining insured risks and usage | Yes | Membership |
| /Membership | A membership to a contract | Yes |  |
| /Questionnaire | List of questions with details for Home Building risks | No | List |
| /AnswerSummary | answer | Yes | Boolean |
| /Identifier | Main question identifier | Yes | String |
| /QuestionAnswerList | List of complementary question answers | Yes | List |
| /QuestionAnswer | Answer details | Yes | List |
| /AnswerType | Answer data type | Yes | enum($asi\_data\_dictionary,value\_type) |
| /QuestionIdentifier | Complementary Question Identifier | Yes | String |
| /ExtCoverNote | Cover note to membership | Yes | CoverNote |
| /Number | Cover note identifier | No | String |
| /Contract | A contract is the contract agreed and signed between the customer and the insurer and is based on one product sold by the insurer.  It describes the parties involved (owner, insured, beneficiary, etc.), the selected coverages, the payments, etc.  It corresponds to all details that appear on the particular conditions or general conditions. | Yes | Contract |
| /CoverageList | The list of coverages | Yes |  |
| ……. | See detailed description of coverage tree parameters in documents for [Secondary activity](#RiskModification) (section in each document **Step « Coverage Selection »**) |  |  |
| /PackageList |  | No | List |
| ……. | See detailed description of package tree parameters in documents for [Secondary activity](#RiskModification) (section in each document **Step « Coverage Selection »**) |  |  |
| /ProductOption |  | No |  |
| ……. | See detailed description of coverage option parameters in documents for [Secondary activity](#RiskModification) (section in each document **Step « Coverage Selection »**) |  |  |
| /PremiumAdjustmentList | List of membership adjustments | No | List |
| ……. | See detailed description of adjustment parameters in documents for [Secondary activity](#RiskModification) (section in each document **Step « Premium Adjustments »**) |  |  |
| /DriverList | List of drivers | No |  |
| ……. | For more details see [Secondary activity](#RiskModification) documents for Vehicle risks |  |  |
| /ExtGreenCard | Green card details | No |  |
| ……. | For more details see [Secondary activity](#RiskModification) documents for Vehicle risks |  |  |
| /InsuredRisk | Insured risk: asset, building/property, vehicle, etc. | Yes | InsuredRisk |
| /EndDate | End date of insured risk | No | Date |
| /EffectiveDate | Start date of insured risk | No | Date |
| /Automobile | An insured automobile | Yes | Automobile |
| ……. | For details see [Secondary activity documents for risk Automobile](#Automobile), ( section **Step « Risk Definition »)** |  |  |
| /Building | An insured building (Immeuble) | Yes | Building |
| ……. | For details see [Secondary activity documents for risk Immeuble](#Immeuble), ( section **Step « Risk Definition »)** |  |  |
| /Caravan | An insured Caravan | Yes | Caravan |
| ……. | For details [see Secondary activity documents for risk Caravan,](#Caravane) ( section **Step « Risk Definition »)** |  |  |
| /Dwelling | An insured Home | Yes | Dwelling |
| ……. | For details [see Secondary activity documents for risk Home](#Habitation), ( section **Step « Risk Definition »)** |  |  |
| /ExtCivilLiability | Civil liability Insured Risk | Yes | ExtCivilLiability |
| ……. | For details [see Secondary activity documents for risk Civil Liability](#Civil), ( section **Step « Risk Definition »)** |  |  |
| /Moped | Insured Risk Cyclomoteur | Yes | Moped |
| ……. | For details [see Secondary activity documents for risk Cyclomoteur](#Moped), ( section **Step « Risk Definition »)** |  |  |
| /Motorcycle | Insured Risk Motorcycle | Yes | Motorcycle |
| ……. | For details [see Secondary activity documents for risk Motorcycle,](#Motorcycle) ( section **Step « Risk Definition »)** |  |  |
| /MotorisedVehicle | Insured Risk Machine | Yes | MotorisedVehicle |
| ……. | For details [see Secondary activity documents for risk Machine](#Machine), ( section **Step « Risk Definition »)** |  |  |
| /Trailer | Insured Risk Remorque | Yes | Trailer |
| ……. | For details [see Secondary activity documents for risk Remorque,](#Trailer) ( section **Step « Risk Definition »)** |  |  |
| /TruckCamper | An insured Camping car | Yes | TruckCamper |
| ……. | For details [see Secondary activity documents for risk Camper,](#TruckCamper) ( section **Step « Risk Definition »)** |  |  |
| /Van | An insured Van | Yes | Van |
| ……. | For details [see Secondary activity documents for risk Van](#Van), ( section **Step « Risk Definition »)** |  |  |
| /ExtAccident | Insured Risk Accident [see Secondary activity documents for risk Accident](#Accident), ( section **Step « Risk Definition »)** | Yes | ExtAccident |
| … |  |  |  |
| /ExtAllRisks | Insured Risk All Risks [see Secondary activity documents for risk All Risks](#AllRisks), ( section **Step « Risk Definition »)** | Yes | ExtAllRisks |
| … |  |  |  |
| /ExtServices | Insured Risk Services Easy - PROTECT see [Secondary activity documents for risk Service Easy Protect](#SrvcEasyProtect), ( section **Step « Risk Definition »)** | Yes | ExtServices |
| … |  |  |  |
| /Usage | Additional details for usage | No | Usage |
| /TaxExemption |  | No |  |
| /AutomobileUsage | Additional details for automobile usage | Yes | Automobile Usage |
| ……. | See [Secondary activity documents](#Automobile) |  |  |
| /BuildingUsage | Additional details for Building | Yes | BuildingUsage |
| ……. | See [Secondary activity documents](#Immeuble) |  |  |
| /CampingCarUsage | Additional details for camper usage | Yes | Camping car Usage |
| ……. | See [Secondary activity documents](#TruckCamper) |  |  |
| /CaravanUsage | Additional Details for Caravan | Yes | CaravanUsage |
| ……. | See [Secondary activity documents](#Caravane) |  |  |
| /DwellingUsage | Additional Details for Home | Yes | DwellingUsage |
| ……. | See [Secondary activity documents](#Habitation) |  |  |
| /MopedUsage | Additional Details for Moped | Yes | MopedUsage |
| ……. | See [Secondary activity documents](#Moped) |  |  |
| /MotocycleUsage | Additional Details for Motocycle | Yes | MotocycleUsage |
| ……. | See [Secondary activity documents](#Motorcycle) |  |  |
| /MotorisedVehicleUsage | Additional Details for Machine | Yes | MotorisedVehicleUsage |
| ……. | See [Secondary activity documents](#Machine) |  |  |
| /TrailerUsage | Additional Details for Remorque | Yes | TrailerUsage |
| ……. | See [Secondary activity documents](#Trailer) |  |  |
| /VanUsage | Additional Details for Van | Yes | VanUsage |
| ……. | See [Secondary activity documents](#Van) |  |  |

* + 1. Step « Premium Adjustments »

#### Description

On this step the user can define a list of premium adjustments. According to requirements the web service has to stop on this step and allow the user to manually define adjustments. On this reason the step won’t be modified to work in service mode.

#### Updates

N/A

#### Data Dictionary

N/A

#### Task Input Data

N/A

* + 1. Step « Validation »

#### Description

This step is just a view and is not impacted by the web services development

#### Updates

N/A

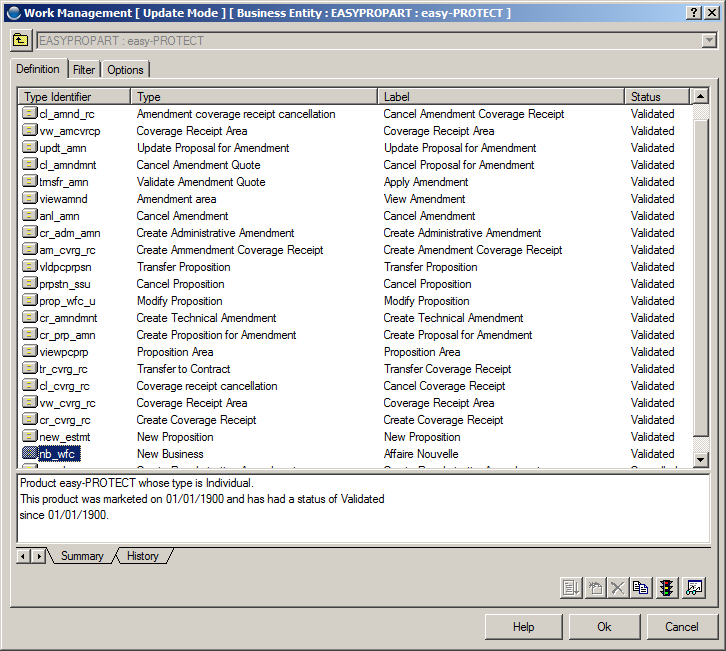
* 1. Secondary Business Activities by Risk

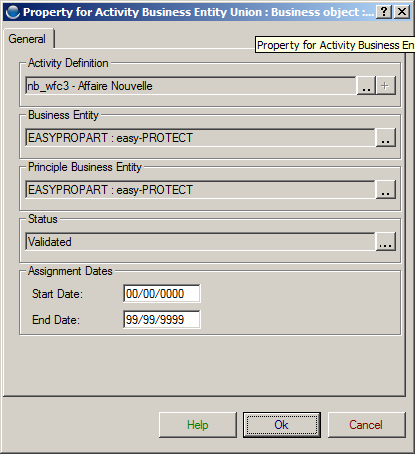
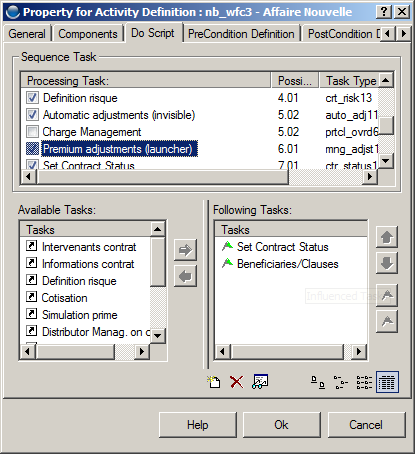
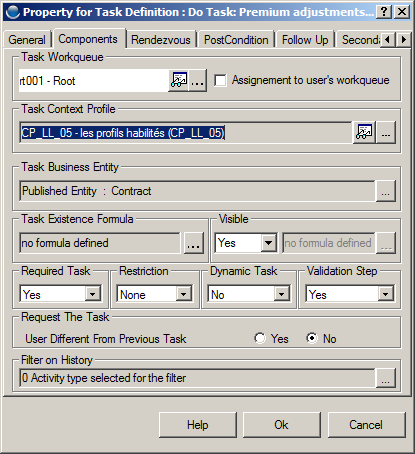
1. 2. 1. “Create Risk” Secondary Business Activity

|  |  |
| --- | --- |
| Risk Label | Activity Document |
| Automobile |  |
| Camping car (TruckCamper) |  |
| Van (Camionnette) |  |
| Machine (Motorised Vehicle) |  |
| Motorcycle |  |
| Moped (Cyclomoteur) |  |
| Civil Liability - |  |
| Caravane |  |
| Trailer( Remorque) |  |
| Habitation Individuelle (Dwelling) |  |
| Immeuble (Building) |  |
| All Risks |  |
| Service Easy Protect |  |
| Accident – type insured Accident Comfort and Accident Performance |  |

1. Parameterisation
   1. Step “Premium Adjustment” on activity “New Business”

Update parametrization for task “Premium Adjustment” in “New business” activity for EASYPROPART product. Set Validation property to “Yes”.





1. Appendix
2. Glossary

A.I.A. - LaLux back office application

“PROdige” – front end web application which will use NewBusiness web service for creation of contracts in A.I.A