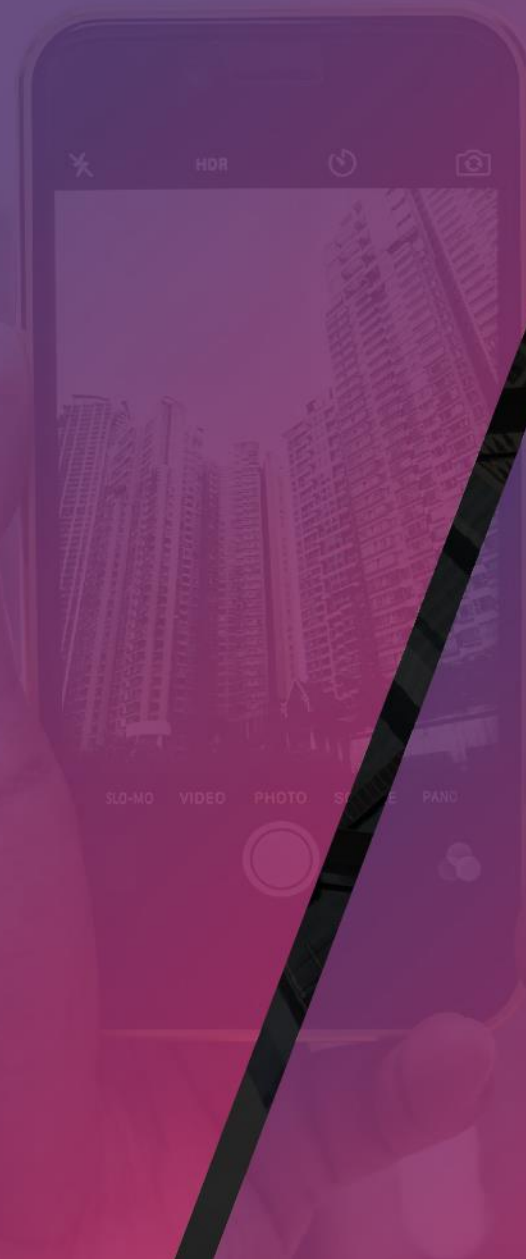




**The Future of Insurance Starts Here**

**Action Rules in Dev Studio**



# AGENDA

- What is Action Rule and its purpose?
- How to begin with a Action rule?
- Different parts of Action Rules
- Database table
- Best Practices



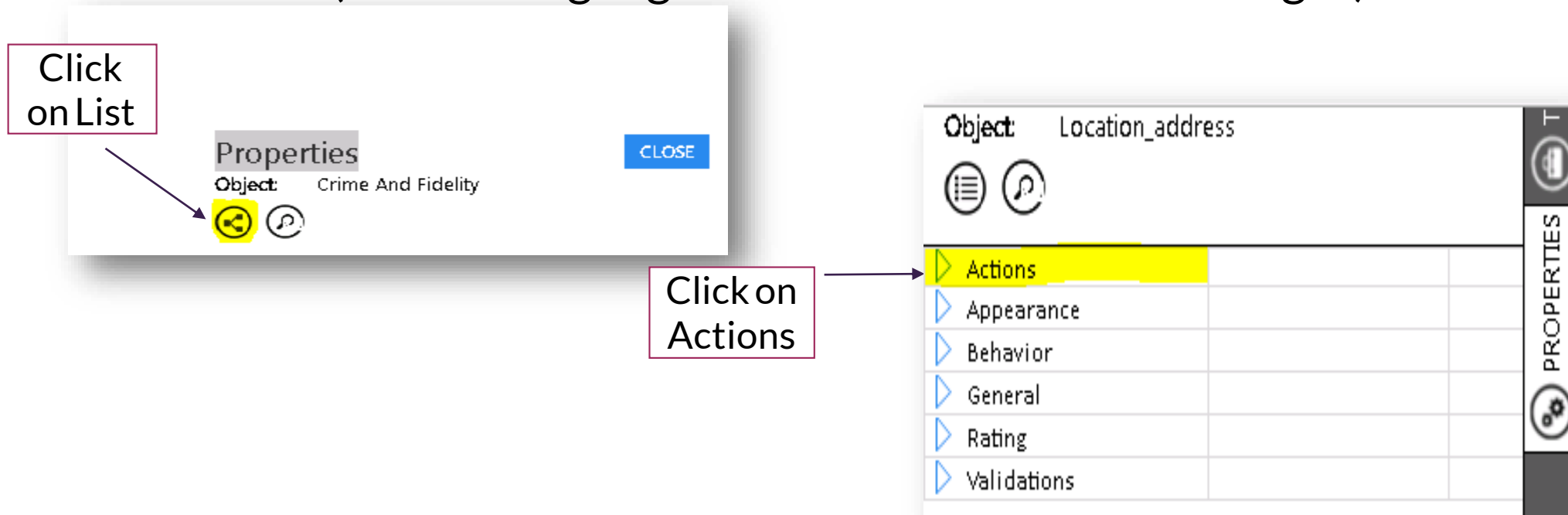
# What is Action Rule and its purpose?

- Action Rule is one of the feature provided by Dev Studio to perform certain operations on client side(Browser) rather than server side(as happens with customization).
- One of the reason is to avoid communication with server every time and hence improve performance.
- It works with the Runtime cache hence doesn't need to always communicate with server.

# How to begin with a Action rule?

- **Action List :**

- Screens plug-in's Properties Editor (Right Panel) contains properties section of Object / Fields.
- Users can click on list section of Properties Editor (Right panel), to locate Actions(Click on highlighted section as shown in images).





# How to begin with a Action rule?

DEV STUDIO

training7

Line Of Business: Crime & Fidelity

VIEW TABS

NEW VIEW

Screens

Search GO

Base Custom

NAME DESCRIPTION

- Locations
- Broker
- Crime Anc
- LOB Ba
- Lob\_cf
- Locatic
- Insuri
- Endors**
- Terrori
- IA Bal
- Sched
- Experi

\*ENDORSEMENTS x

SEARCH COMPLETE CANCEL SAVE

Description

Location\_address

Street

Address Field1

Satya Test Field Inland Marine LABEL1

Line\_2

City

State

Zip\_code

Location Sublimit

Indoor Values

Properties

Field: Location\_address

Object: Location\_address

Actions

Field	Object	...
On Change	Defined	...
On Click	Not Defined	...

Appearance

Behavior

General

Rating

Validations

TOOLBOX

PROPERTIES

# How to begin with a Action rule?

Action can be configured on 2 different properties:

- **On Change** : When the requirement is to trigger another event action, On Change will be used. Normally used with Radio Buttons (applicable to all except Check box).
- For Example: If there are two radio buttons and selecting one has to trigger a new field then On Change should be used.
- **On Click** : When the requirement is to trigger another event actions, On Click will be used. Normally used with Checkbox.
- For Example: If there are two checkboxes and selecting one has to trigger a new field then On Click should be used

# How to begin with a Action rule?

- **ACTION RULE CONFIGURATION EDITOR:**
  - The Editor layout is designed to view or edit ACTION Rule attributes.

## Rules

(OBJECT: Address, HIERARCHY: Crime And Fidelity->Endorsements->Endorsements->LOCATION, FIELD: Zip\_code, PROPERTY: On Change)

Category: Action Rule

Author:

Release:

Search By:

ADD SEARCH

☒ BASE ☒ CUSTOM ☒ ALL HIERARCHIES

 ADD  EDIT  COPY  REMOVE

SELECT	SOURCE	RULE ID	CATEGORY	RELEASE	RULE DESCRIPTION	MORE
<input type="checkbox"/>	BASE	19892	Action Rule	2013.5.0	perform geocode	<a href="#">MORE INFO</a>
<input type="checkbox"/>	BASE	12514	Action Rule	2013.5.0	Enable Disable the Copy Mailing address when ZIP_CODE is changed	<a href="#">MORE INFO</a>
<input type="checkbox"/>	BASE	AAM-CF-0009	Action Rule	13.11.0	Enable Disable the Copy Mailing address when ZIP_CODE is changed	<a href="#">MORE INFO</a>

CLOSE

# How to begin with a Action rule?

- Action Rules added by base user for a given property are called as Base Rules which are visible in both Base and Custom login of Cover-all Dev studio.
- As per customer requirement, customized Action rules can be applied on the top of the Base Rules, those are called as Custom Rules.
- The information displayed in the top panel of Editor provides information about a Validation Rule attribute and has following fields. First top line indicates Parent object name, actual object, field name and the property on which the User is applying the Rule



# Attributes

Attribute	Description
CATEGORY	<ul style="list-style-type: none"><li>• This is the specification of the Validation Rule<ul style="list-style-type: none"><li>○ Default value: Action Rule</li></ul></li></ul>
AUTHOR	<ul style="list-style-type: none"><li>• This column holds information of the User</li></ul>
RELEASE	<ul style="list-style-type: none"><li>• Product Release version from which User wants to apply Rule for a specific Property<ul style="list-style-type: none"><li>○ Example: Base Release no 16.1.0</li><li>○ Example: Custom Release no 41.0.0</li></ul></li></ul>
SEARCH BY	<ul style="list-style-type: none"><li>• Criteria to search rules</li></ul>

# How to begin with a Action rule?

- Users can specifically filter on the type of Rules (Base, Custom and all hierarchies).
- Editor Bottom panel shows all Rules for specific Property and has following attributes.

Attribute	Description
SELECT	<ul style="list-style-type: none"><li>○ User can Edit Rule by selecting SELECT</li></ul>
SOURCE	<ul style="list-style-type: none"><li>○ This column holds Type of Action Rule</li><li>○ Base: If Action Rules are created for the Base.</li><li>○ Custom: If Action rules are created for customize requirement</li></ul>
RULEID	<ul style="list-style-type: none"><li>○ This column holds Rule ID for specific field property</li><li>○ This is auto generated Id based on screen and description of the Rules.</li></ul>
CATEGORY	<ul style="list-style-type: none"><li>○ This column holds Validation Rule</li><li>○ Default Value: Action Rule</li></ul>
RELEASE	<ul style="list-style-type: none"><li>○ Product Release version from which User wants to apply Rule for specific Property</li><li>○ This column is mandatory field</li><li>○ Example: Base Release no 16.1.0</li><li>○ Example: Custom Release no 40.0.0</li></ul>
RULE DESCRIPTION	<ul style="list-style-type: none"><li>○ This column holds description of the applied Action Rule for properties.</li></ul>
MORE	<ul style="list-style-type: none"><li>○ User can click on MORE INFO, to modify or add conditions/ define Rule</li></ul>

# Different parts of Action Rules and the corresponding table

- **RULE CONFIGURATION EDITOR: MORE INFO :**

- On click of MORE INFO/ADD button on panel it opens rule configuration editor

Rule: 12514

Action Rule

2082.5.0

perform geocode

WHEN

BASIC CONDITION ON POLICY ATTRIBUTES

Control Date

is between

Product

is

Control By Adoption ?

☐

and

Line of Business

is

Adoption Type

Company

is

Transaction

is any of

Bureau Effective Date

State

is any of

Originating Role

is any of

Product Version

is

Program

is any of

Current Role

is any of

ADVANCED CONDITION

Market Segment

is any of

MultiState

is

THEN

ZIP\_CODE

ACTIONS FOR: FIELD: Zip\_code, OBJECT: Crime And Fidelity->Endorsements->Endorsements->LOCATION

+ ADD ACTION

REMOVE ALL

Call

Show Fields

PARAMETERS...

CLOSE

# Operations Parameters

Action	Property	Options
<b>SET</b>	Used to set different Types of properties.  This is typically used when defining fields.	Options: Yes or No
<b>CALL</b>	Used only when under Action Type of properties.  For Example: Save W/O Validation	Parameters : Always or Conditionally

# Database table

- The editor contains 3 main sections as mentioned below
  - WHEN
    - ADVANCED CONDITION
  - THEN
- The parameters of WHEN condition goes into PCT\_QUALIFIERS table
- The query of ADVANCED CONDITION goes into PCT\_QUALIFIER\_CRITERIA.
- The parameters in THEN part goes to PCT\_OPERATIONS and PCT\_OPERATION\_PARAMETERS table.



Steps to analyze  
Action Rule

# Different parts of Action Rules and the corresponding table

- **RULE CONFIGURATION EDITOR: WHEN SECTION :**
  - In this section, user can apply conditions on Policy/System attributes and Advance conditions as per business requirement. This section is called as **WHEN: BASIC CONDITION ON POLICY ATTRIBUTES**

Attribute	Description
CONTROL DATE is between	User can apply condition by selecting CONTROL DATE range, between those dates Rule can be Active. The date entered for "and" can be Null is between: 01/01/2016 and: Null/01/01/2017
COMPANY is	This column defines list of licensed companies for which the user is configuring the Rule. If Company is Null then rule can apply to all companies.
STATE is any of	This column holds the state code for which the rule is applicable. Null State Code record is applicable to all States. State Code is two-character string. Example: AL for Alabama



# Different parts of Action Rules and the corresponding table

Attribute	Description
PROGRAM is any of	Users can select applicable program for which the Rule has to qualify. If there is no program configured, then Rule applies to all programs
MARKET SEGMENT is any of	This column defines list of Market Segment for which the user is configuring the Rule. If Market Segment is Null then rule can apply to all market.
PRODUCT is	This column holds the Product for which the rule is applicable. Null Product record is applicable to all Product.
LINE BUSINESS IS OF	This column defines Line of Business for which the User is configuring the Rule. The log-in Line of business having Default set to LOB Example: User Logs-in with General liability then the Line Of Business is GL

# Different parts of Action Rules and the corresponding table

Attribute	Description
TRANSACTION is any of	This column defines Transaction for which the Rule is configured. Example: If Transaction is any of "CANCELLATION" then this Rule executes only for cancellation transactions performed on Policy.
ORIGINATING ROLE is any of	This column specifies the rule is applicable for any originating role. Null is applicable to all originating role.
CURRENT ROLE is any of	This column specifies the rule is applicable for any specific/set of role. Null is applicable to all role.
CONTROL      BY ADOPTION	This column defines if this rule is to be adopted by customers. Not selected means adoption is not required.
ADOPTION TYPE	This column specifies the adoption type for this rule if control for adoption is selected.

# Different parts of Action Rules and the corresponding table

Attribute	Description
BUREAU EFFECTIVE DATE	This column defines the date from which the rule is applicable as specified by bureau(for e.g. ISO)
PRODUCT VERSION is	This column holds Product version from which rule can be applied to the Field property. The Product version is of Base pack version
CUSTOM PACK VERSION	This column holds Custom version from which the rule can be applied to the Field property. The Custom version is for custom Rule

- Data for WHEN section goes into PCT\_QUALIFIERS table

# Different parts of Action Rules and the corresponding table

- **ACTION RULE CONFIGURATION EDITOR: THEN SECTION**

- The THEN section of validation rule contains Add Action section as mentioned below:

The screenshot displays the 'Action Rule Configuration Editor' for rule 'CF-C-11686075-19569'. The rule description is 'Enable Disable the Copy Mailing address when ZIP\_CODE is changed'. The interface is divided into 'WHEN' and 'THEN' sections. The 'WHEN' section is currently active, showing a 'BASIC CONDITION ON POLICY ATTRIBUTES' with fields like 'Control Date', 'Product', 'Line of Business', 'Company', 'State', 'Program', and 'Market Segment'. A dropdown menu is open over the 'Product' field, listing actions such as 'Add', 'Add Object', 'Cancel', 'Check Criteria', 'Clear Notification', 'Delete', 'Edit', 'Email', 'Enable Fields', and 'Exit'. The 'THEN' section is visible below, showing 'ACTIONS FOR: FIELD: Zip\_code, OBJECT: Cr' and a list of actions including 'Call'. At the bottom, there are buttons for 'VALIDATE', 'SAVE', and 'CANCEL'.

Rule: CF-C-11686075-19569    Action Rule    NOT RELEASED

Enable Disable the Copy Mailing address when ZIP\_CODE is changed

**WHEN**

BASIC CONDITION ON POLICY ATTRIBUTES

Control Date is between [ ] Product is [ ] Control By Adoption ? ☐

and [ ] Line of Business is CF Adoption Type [ ]

Company is [ ] Bureau Effective Date [ ]

State is any of [ ] Custom Pack Version is [ ]

Program is any of [ ]

Market Segment is any of [ ]

**THEN**

ZIP\_CODE

ACTIONS FOR: FIELD: Zip\_code, OBJECT: Cr

Call [ ]

> Endorsements -> LOCATION    + ADD ACTION    - REMOVE ALL

VALIDATE    SAVE    CANCEL

# Different parts of Action Rules and the corresponding table

- The Action Rules section contains list of actions that can be called on event.
- Show Fields, Enable Fields, Popup Message, Save w/o Validations are common type of actions that can be called.
- Some of the actions displays Parameters section. Show field action is one of the action that shows PARAMETERS section. Data for parameters goes into PCT\_OPERATION\_PARAMETERS table
- Action can be conditional if conditionally Radio button is checked. And the condition returns true value.

**Action Parameters**

**Execute** ☒ Always ☐ Conditionally

Show/Hide following fields :

SELECT	NAME	VISIBLE LOGIC
<input type="checkbox"/>	{../COPY_MAILING_ADDRESS}	\$ { func:decode( var:component('LINE_1'), '' }, func:decode( var:component('LINE_2

OK CANCEL

# Different parts of Action Rules and the corresponding table

- For e.g. If there is a requirement that on change of value on LINE 1 field, the other fields like LINE 2, CITY, STATE CODE, ZIP CODE needs to be shown(make as updatable). Assume that initially all these fields are non-editable (Updatable = N).
- Then an Action rule can be configured on “On Change” of LINE 1 field. Action to be used will be “Show Fields” and in parameter specify all the fields that needs to be editable(LINE 2, CITY, STATE CODE, ZIP CODE ).



## Different parts of Action Rules and the corresponding table

- Advanced Condition section in Action Rule:

[illegible]

# Best Practices

- No new listeners should be added in the system except 'Save without Validate' and that too when really necessary.
- Please prefer configuration rules instead of action rules.



THANK YOU!

