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The Future of Insurance Starts Here

Forms and Documents Plugin

AGENDA

- Search forms and documents based on various search criteria
- Add and modify forms and documents.
- Design a document or form with fill-in data using MS Word.
- Define attachment rules.
- Define fill-in User Variables for forms
- Define SQL statements in form
- Using MapData tool

Forms & Documents Plugin

- The “Forms & Documents” plug-in of Dev Studio provides the functionality required to manage and configure various forms and documents, which are necessary throughout the lifecycle of an insurance policy.

- Confluence Link :

https://confluence.majesco.com/display/MPCL/Forms+and+Documents+Plugin

Navigating and searching

- Search forms and documents from the existing forms and documents library to quickly retrieve specific forms and documents.
- There are multiple ways to search for forms and documents:
  - **Keywords -** System will find all the forms and documents that have this Keyword(s) under the "Name", "Description" or "ID" columns.
  - **Name, Description, ID, Edition Date -** System will find all the forms and documents that have this specific Name, Description or ID that user has entered.
  - **Wildcard Search -** Using a '%' sign would allow the user to search for a pattern.
  - **Base vs. Custom -** Allows the user to search only Base forms or Custom forms or both.
- The scope of the search is limited to selected Line of Business or Product.
- Navigator (Left Panel) lists all forms and documents which can be filtered by entering search criteria in Search box or selecting Base and Custom checkbox.
- Editor (Right Panel) shows selected form or document
- Editor is a multi-tab interface to open multiple forms and documents for viewing or editing.

Creating a new form using form editor

- The Editor layout is designed to view or edit forms attributes on top panel and other related information about forms and document in bottom tab panel. The bottom tab panel organizes following information in multiple tabs:
  - ATTACHMENT LOGIC
  - TEMPLATES
  - VARIABLES
  - STATE FILINGS

Creating a new form using form editor

- **FORMS AND DOCUMENTS ATTRIBUTES**
  - The information displayed in the top panel of Editor provides information about a form or document's following attributes:

ID	Unique identifier across different editions/revisions of forms and documents • Example: CA-CA0201 ID is generated as: LOB - FORM_NAME (without edition date) • Example: IL-0017 ID for an Interline form is generated by starting with IL instead of LOB code
NAME	Form or document name • Example: CA02011204 Name is generated as: Form Name (with edition date)
EDITION	Form or document edition date • Example: 12-04
SOURCE	Describes if the form is "Base" or "Custom" form. "Base" indicates ISO / NCCI forms. "Custom" indicates customer-specific forms NOTE • This is automatically generated by Dev Studio and cannot be modified • Base forms cannot be modified by customers
STATE	Indicates if form or document is state-specific or countrywide
DESCRIPTION	Description of the form or document
TYPE	Whether it is a Form or Document NOTE Document and Forms are handled differently in Cover-All Policy; hence, it is important to differentiate between forms and document although there is little or no difference in configuring them. For example, documents are not printed on forms schedule, documents can be chosen separately to include in print package while all forms can be either included or excluded from the print package.

Forms & Documents Attributes

CATEGORY	Used for display order of the forms using Form, Pre Form & Post Form categories. Form: Forms are ordered using the form name. Pre Form: Forms are ordered before the forms under Form Category. (Typically used when a form has to be listed out of order of its form name or listed as the first form) Post Form: Forms are ordered after the forms under Form Category.
INTERLINE	Indicates whether the form can be used by multiple lines of business. If selected, a link will be displayed to specify applicable lines of business
MANUSCRIPT	Indicate if a form is a Manuscript form. Manuscript forms are generally designed as blank templates to allow users to put language at time of processing quote or policy using Cover-All Policy.
STATIC	Indicates if the form has any data mapping. Static forms do not have any data mapping.
REQUIRES ADOPTION	Indicates if forms require adoptions, i.e. only available upon company adoption. NOTE This is only applicable for "Base" (ISO/NCCI) forms and not "Custom" (Customer specific) forms.

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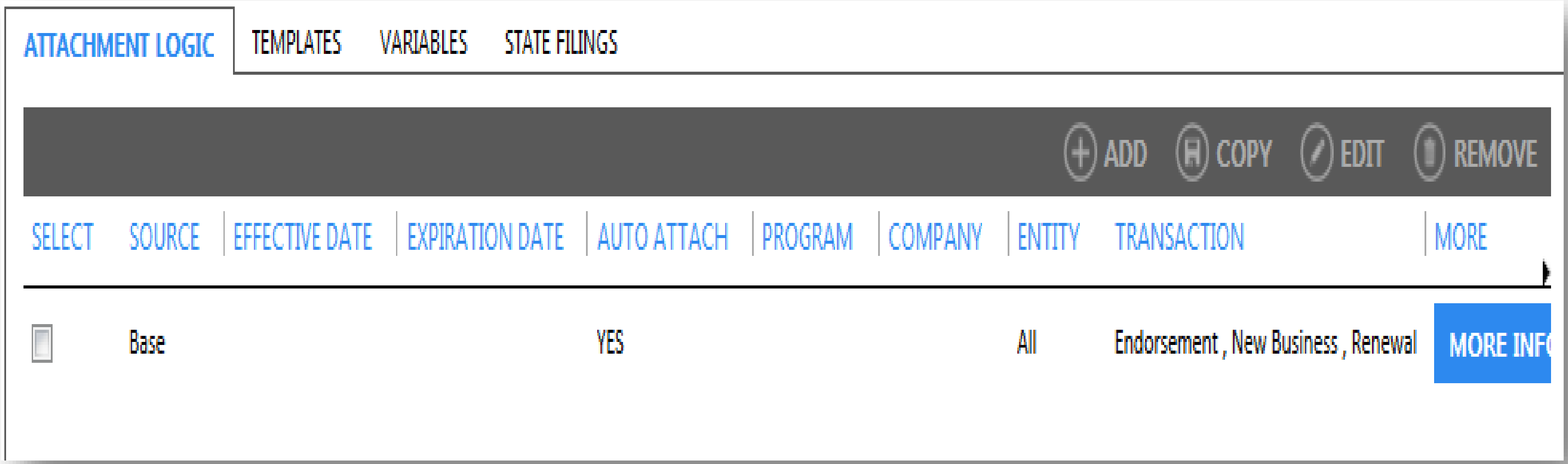
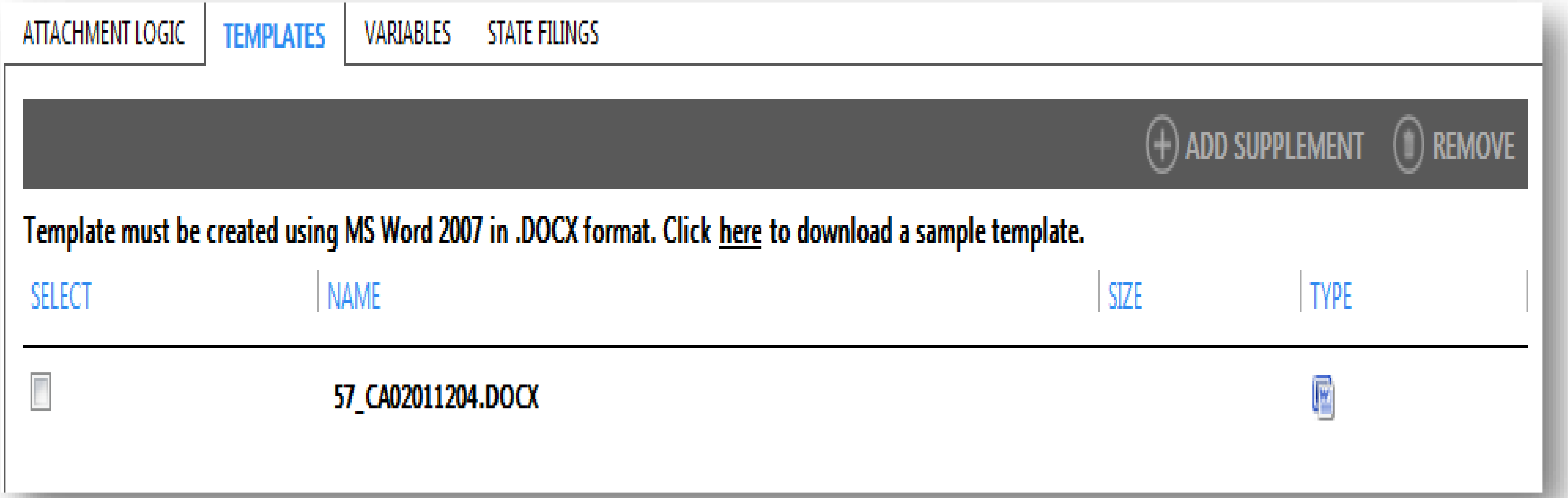
Attachment Logic

- Editor bottom panel tab ATTACHMENT LOGIC provides capability to define attachment rules.
- Attachment logic is a set of conditions that gets executed within Cover-All Policy to qualify applicable forms and documents.
- An attachment criteria configuration is mandatory for all the forms and documents.



Templates

- Editor bottom panel tab TEMPLATES provides capability to upload or download MS Word document template.
- MS Word document must be of file extension ".DOCX" and developed using MS Word 2007.
- Templates are required for all the forms and documents.



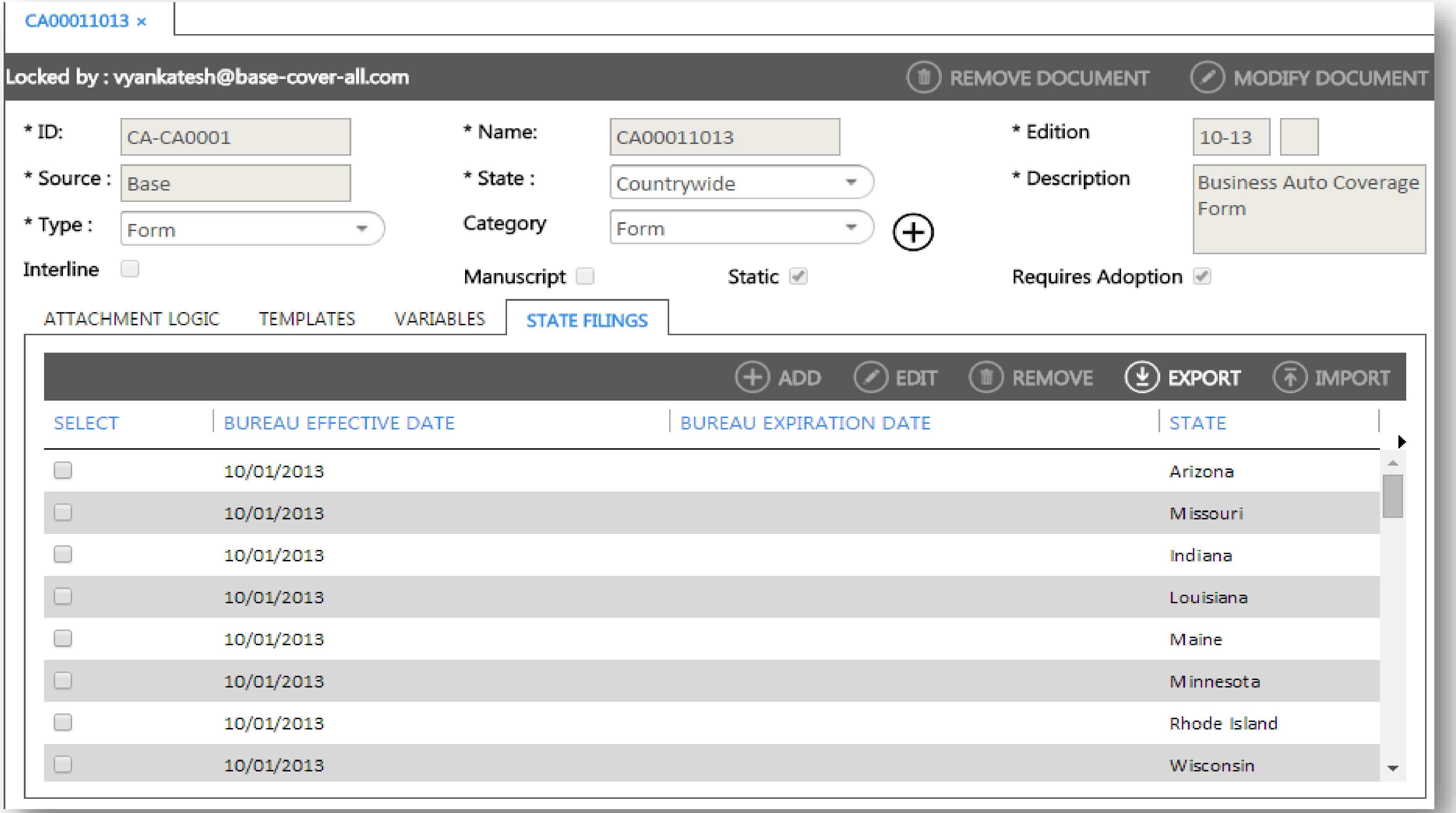
Naming Convention for Templates

- Although there is no restriction on what the form/document name should be, preferable following convention should be followed.
  - Form/Document number can be used as the template name.
  - The last four digits of form should indicate edition date ("MM-YY").
  - Hyphen (-) and spaces can be used between form name.
  - There should not be any special characters.
  - Form/Document name should be in upper case.
    Example: CA00200310.docx

State Filings

- The State Filings tab provides capability to define applicable states and their effective dates for countrywide forms. State Filings is applicable for "Base" (ISO / NCCI) forms only, which can be adopted by states.
- For each bureau form being added in the system, a state filing must be present.
- A state filing is added using a Bureau Effective Date for each state that is applicable for the form.
- ISO/NCCI bureau release forms using a Bureau Effective Date. For each form, based on the Bureau Effective date, each state applicable for the form is added in the State Filing section using the Bureau Effective date for that state in a Base Pack. Only then the forms in that state are available for adoption in the Custom Pack.
- If a form is a state specific form, then a single entry needs to be added with state filing bureau effective date.
- If a form is a countrywide form, then multiple entries need to be added to with appropriate state filing bureau effective dates for all applicable states.

State Filings



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VARIABLES

- Editor bottom panel tab TEMPLATES provides capability to define fill-in variables for information not entered in quote or policy screens and is typically needed only for a single form.
- Variable configuration is optional for filling data on forms if a form requires information that is not captured in policy or quote screens.
- Variable configuration is not applicable to Documents.
- Variables defined for forms are shown in Cover-All Policy Forms Tab for manual user data entry during quote or policy processing.

ATTACHMENT LOGIC | TEMPLATES | VARIABLES | STATE FILINGS

ADD | EDIT | REMOVE

SELECT	NAME	DESCRIPTION	TYPE	SIZE	REQUIRED?	VALUE TYPE	DEFA
☐	01Liab	Enter 'X' if reinstatement applies to Liability for AllCovered ""Autos""	STRING	1,024	No	Static	
☐	02Liab	Enter 'X' if reinstatement applies to Liability for All Covered ""Autos"" You Own	STRING	1,024	No	Static	

Basic form attachment rule

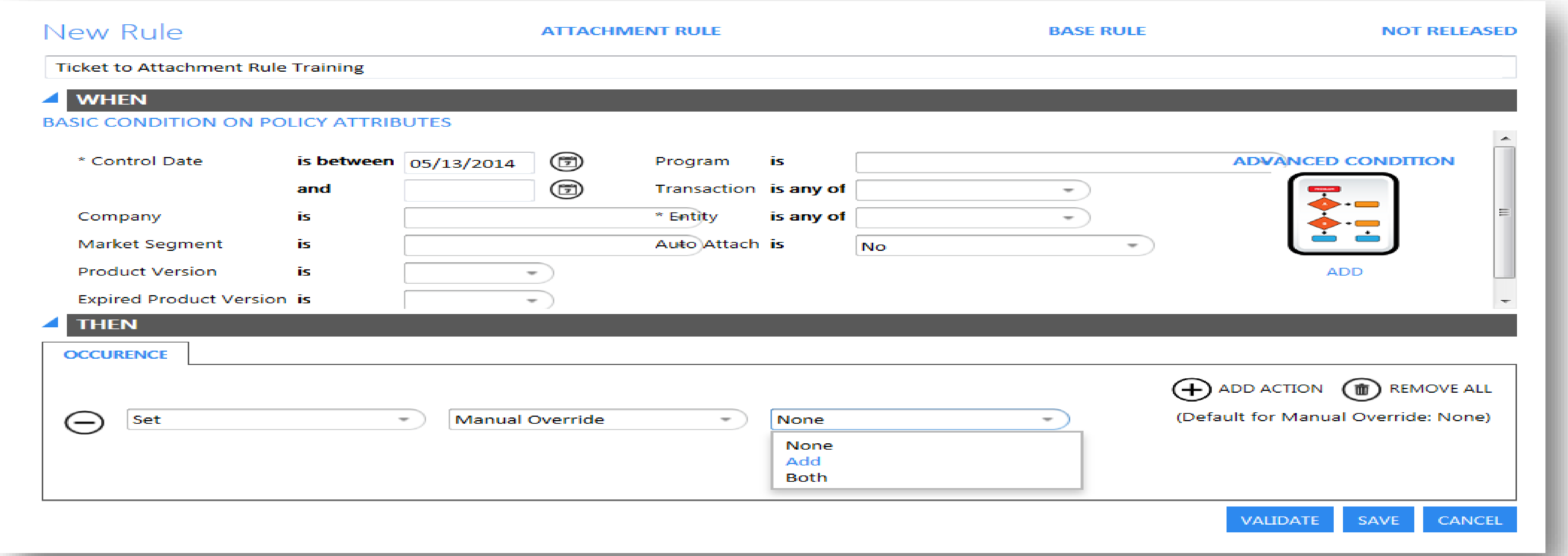
- This module describes the basic forms attachment rules. Basic forms attachment rules can be defined based on most common attributes and does not require any SQL knowledge.

UNDERSTANDING THE FORMS ATTACHMENT RULE EDITOR

- Attachment rules, also known as attachment criteria, are a set of conditions that need to be met for a form/document to be attached to the policy.
- When a Quote/Policy in Cover-All policy meets these conditions, the Form/Document qualifies for attachment.
- It is required that each form or document have this basic attachment rule setup in-order for the form/document to attach to any quote/policy.

Attributes of the Form Attachment Editor

- Navigating to the Form Attachment Rule Editor:
- The forms attachment rule editor is found on the Forms Editor (right panel) under the Attachment Logic Tab by adding a new attachment rule or editing an existing attachment rule.



Section of Rules

- The attachment rule editor is defined in two sections as “WHEN” and “THEN”.
  - “WHEN” section is used to define the rules required for the system to decide “When” the form/document should qualify for attachment and apply advance conditions as per business requirement. Advance condition will decide whether the form will attached or not.
  - “THEN” section is used to define the rules required for the system to decide actions taken after the form/document has qualified for attachment.

When attributes

Attribute	Description
Control Date is between and	Indicates the date range when an attachment rule is active. • Effective date/Control Date of a Quote/Policy is compared with Control Date range defined under this field. • Effective date (Entered for "in between") is mandatory. Expiration date (Entered for "and") is optional at the time the attachment rule is added. • Example - Effective date is 01/01/2014 and Expiration date is null or 01/01/2015
Company	Company for which the Attachment Rule is being configured. List of companies licensed for will be shown in the company dropdown list. If no company is selected attachment rule for the form will apply for all companies.
Product Version	The product version from which the attachment rule becomes effective.
Expired Product Version	The product version up to which the attachment rule is effective.
Transaction	Form/Document will attach to all selected transactions. Transactions can be selected from the dropdown list. Single or multiple values can be selected. If no transactions are selected form attachment rule will apply for all available transactions. • New Business • Endorsement • Renewal • Cancellation • Reinstatement • Audit
Entity	Form/Document will attach to all those entities which are selected. User can select valid values from the drop down list. Single or multiple values can be selected. "All" option is inclusive of Quote/Binder/Policy • Quote • Binder • Policy • All
Auto Attach	Specifies if form is mandatory or optional. • Yes - Mandatory • No Optional (Manually Attach) For documents the value will always be "Yes"
Advanced Condition	In addition to the basic form attachment attributes, Cover-All Policy supports advanced rules for attachment. These are configured by using a PL/SQL block of specific conditions to decide when the form or document would qualify for attachment. Refer to Module 4 for Advanced form attachment rules
Program	Users can select applicable programs from the drop down list for which the form to qualify for attachment. If no program is configured, the form will attach for all programs.

Then Occurrence

Override Base	Applicable for the forms configured from Base for which user would like to override with a new custom attachment rule • Yes – Custom Attachment Rule will take precedence over base rule.
Manual Override	Once the form is attached on the policy, this attribute determines how user can interact with a form on forms tab in Cover-All Policy. • Add - A user can add the form manually. • Delete - A user can delete a form. • Both - User can add and delete a form. • None - User cannot interact with form.
Occurrence Logic	It is used to determine the number of occurrences of forms to be created. For e.g if 5 vehicles are taken on a Policy and Collision coverage is taken for all 5 vehicles. If a separate form needs to be created for every vehicle then a query needs to be written in Occurrence logic section.

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Advance condition

- Advance condition is used when there is need to put condition other than those specified in WHEN condition.
- It contains a SQL query whose result should always return a ‘0’ value.
- Once the WHEN condition (if specified) is satisfied along with advance conditions returning ‘0’ then the rule qualifies to be executed.
- To View /Add advance conditions, user can click on ADVANCE CONDITION icon.
- NOTE : Advanced condition sql should be always ended by a ";" (semicolon)
- Advance condition either return 0 or non-zero.

  0 : True

  Non-zero : False

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Difference between Base and Custom attachment rules

- Attachment rules can be defined in Base Pack or in Custom Pack depending upon whether the form/document is configured in Base or Custom Pack.
- Base Attachment rule is defined for a base form and can only be added to or modified from a base pack.
- Custom Attachment rule can be defined for a base form as well as a custom form and can only be added to or modified from a custom pack.
- In order to add a custom attachment rule to a Base Form, in Attachment Rule editor under the “Then” section, “Override Base” should be set to “Yes”.
- Under the Forms Editor - Attachment Logic tab, users can view the different attachment rules configured for a particular form or document. At any given point, Cover-All policy system expects only one Attachment Rule to be active based on the conditions added in the attachment rules.

Form user variables

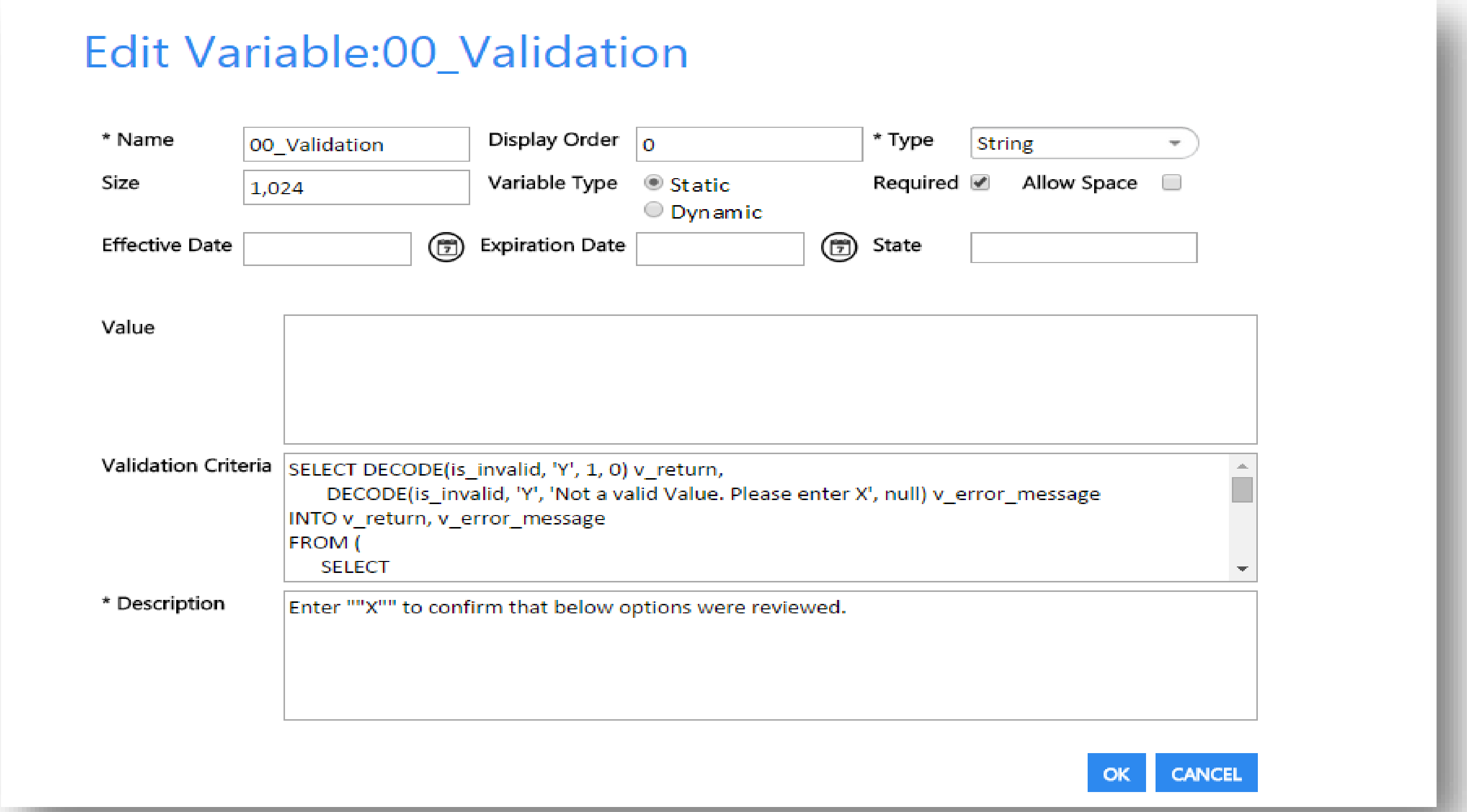
- Forms data can be mapped directly from application screens using system variables; however, in cases where the information to be mapped is not captured in policy application screens, additional data elements outside of the policy application screens called User Variables are required.
- Cover-All Policy provides the capability of adding User Variables for a particular form. User Variables are displayed only if a form is attached during policy transaction processing.

Form user variables

- Cover-All Policy classifies Variables printed on forms as "User Variable" and "System Variable".
- System Variable: Data is retrieved and mapped from objects configured via Dev Studio like Coverage, Risks and even data that is in rating/premium calculations which are part of the policy system.
- User Variables: Cover-All provides a capability to capture the data outside of the Policy system where users can enter data during Forms Management process with the purpose of printing on forms only.
- User Variables are configured for a particular form and are displayed when a form attaches to a Quote/Policy. Multiple User Variables can be configured for a Form Definition.
- In Dev Studio, User Variables are configured through the "Variables" tab on Forms Definition Editor.
- In Cover-All Policy, User Variables that are configured for a particular form are then displayed on the Forms Tab by clicking on the ”Variable” link for the form during the forms management process.

Form user variable – Creating variables

- Navigating to the User Variables Editor
  - The User Variables Editor is found on the Forms Editor (right panel) under the User Variables Tab by adding a new user variable or editing an existing user variable.



Microsoft Word Document

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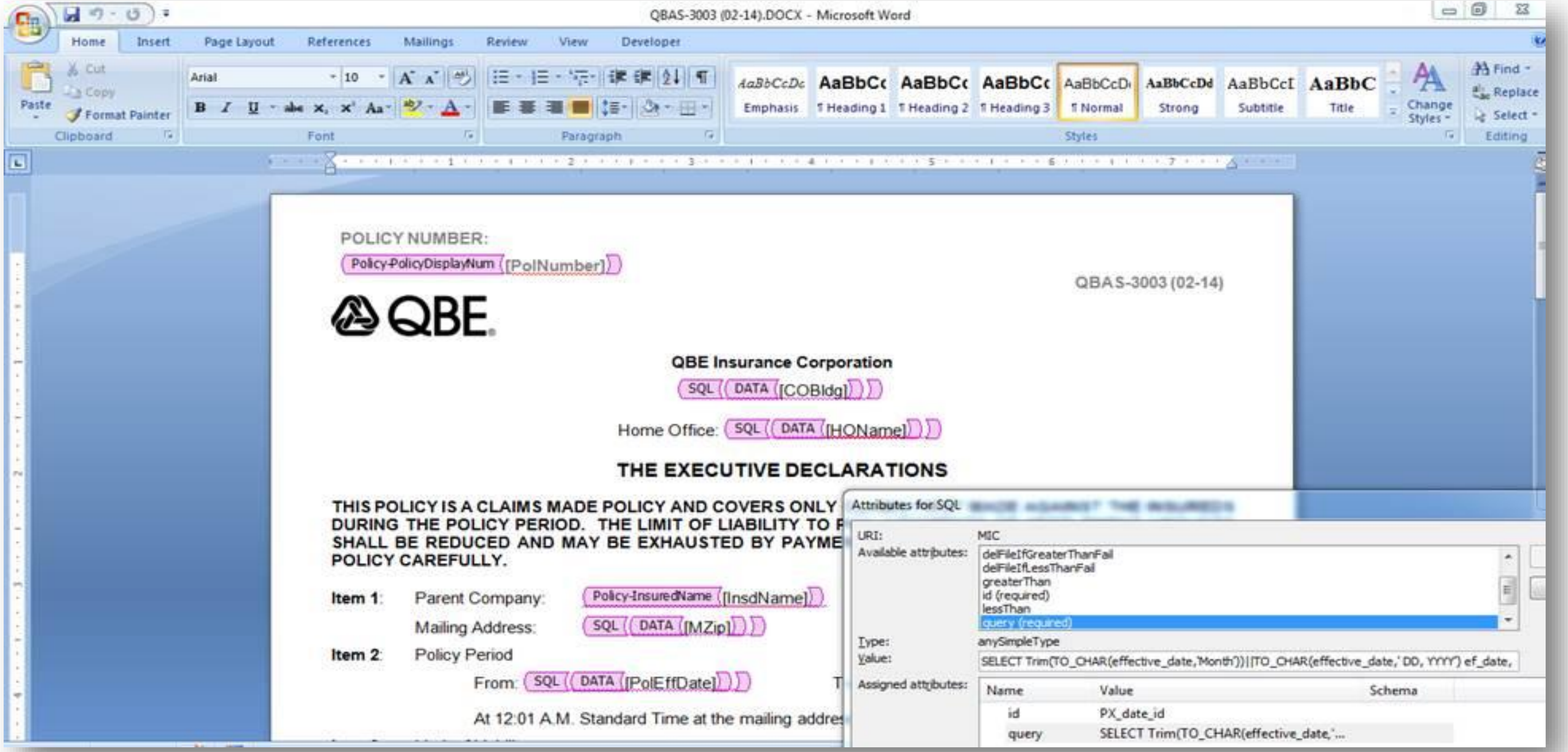
Attributes of user variable

Attribute	Description
*Name	Defined name for the variable – this value must be unique for a given form. Example – 00_ Validation
*Type	A user variable is configured with a Data Type, The data type used depends on what type of value this variable needs to hold. The following are available values: • Integer • String • Large String • Date • Long • Rich Text • Decimals • Percent • USD
Size	The size/length of the variable up to which data can be entered.
*Description	This is the description of the User Variable that will appear on the Forms Tab while entering data for User Variable. This will be displayed as a label.
Required	User Variables can be optional or mandatory. When the Required check box is checked for any user variable, Cover-All Policy requires users to enter a value for the variable.
Variable Type	Static : It will always show fixed value (eg. limits) Dynamic : It will always show variable value.
Display Order	The order in which the variables will appear on the forms tab. Note: If this order is set as null, Variables are ordered by Name.
Effective Date	The date from which the Variable is effective. This value is compared with effective date of a Quote/Policy.
Expiration date	The date from which the Variable is expired and will not be available in the UI. This value is compared with effective date of a Quote/Policy.
Validation Criteria	User can write a PL/SQL block to validate the values which are entered in Variables.
Value	Cover-All also provides capability to Default a Value to the particular user variable. This is used for forms where the Variable Data does not change from one policy to another. Once the form is attached, the User Variables are automatically populated using the Default Value for the Variable.

Mapping System Variable form

- For system variable in which data needs to be fetched through sql query we can select SQL tag by selecting the text for e.g Type SQLTest select the SQLTest → Right click → Apply XML Elements and select SQL.
- Again right click on same text Select Attributes. Then in "available attributes" section select ID and in value give any value like TestID and click on add button.
- Then again go to "available attributes" section and select Query and in value section write the query.
- If required, IF tags could be added around DATA tags to enable conditional data population
- Then write any text where data needs to be displayed. Select the text right click → Apply xml tags→ DATA.
- Again select the text → Right click → Attribute → Select Value(Required) available under Available attributes option → Under value option paste below mentioned text ${var:sqlResult('QueryID','Column1')}. Where QueryID is ID of SQL query created on above step and Column1 is the column selected on select query.

System variable



Mapping User Variable form

- For User Variable data to be mapped on form a text should be written and selected → Right Click → Apply XML Element → FORMDATA.
- Then again select the text → Right Click → Attributes→ select VaribleName(Required) → under value section put the variable name created on Forms through Dev Studio.

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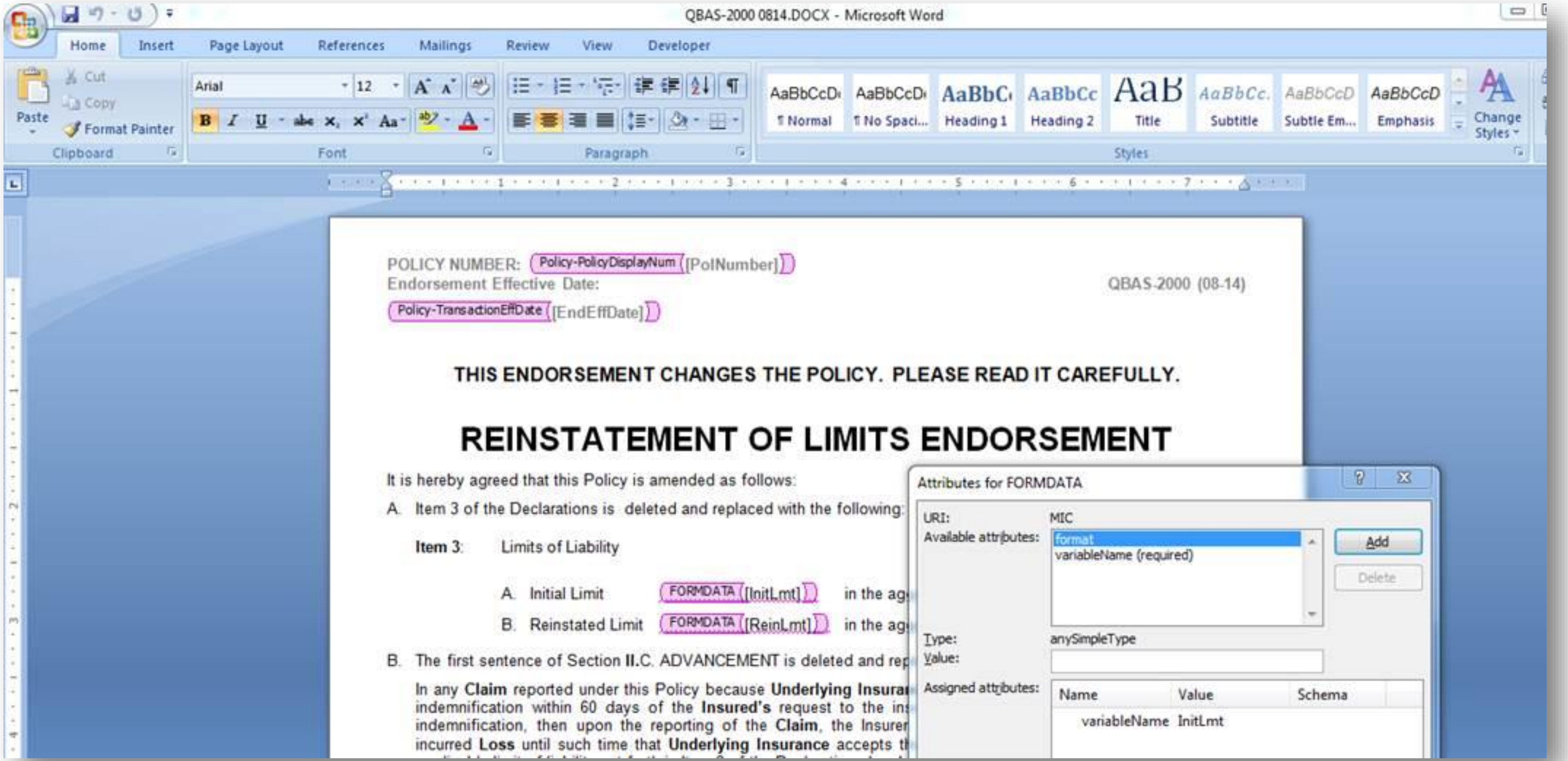
Form user variable – Using variables



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THANK YOU!