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The Future of Insurance Starts Here

Forms & Document Design

AGENDA

- Mapping data in forms
- **Xml Smart Tags**
- **Smart Tags Examples**
- **Design & Test Forms**
- Advance Xml tags
- SQL & DATA Tags
- IF Tags
- Image Plugin & Image Tags

Mapping data in forms

- **Mapping data in a user-defined document is a new capability in My Insurance Center for facilitating user maintained document generation for policy and quotes.**

- **Prerequisites:**
  - MIC release 7.0.14 or higher
  - Word 2007
  - General knowledge of SQL
- Note: **Ctrl-Shift-X** will show all tags.

Xml Smarttags

- These are predefined simple XML tags that need no configuration and when placed on the form/document get replaced with the appropriate value from the Quote/Policy during runtime.
- SmartTags contain Policy level information which is not specific to any product.
- Using SmartTags also has performance benefits, as values are cached for a Quote/Policy and are used for all documents for that Quote/Policy without fetching values repeatedly from the database.
- These XML tags are simply added around place holders or boilerplates.
- Every SmartTag has a pre-defined value associated with it.
- Example – "Policy-PolicyNumber" tag is used to Map Quote/Policy number on the document.

Xml Smarttags

- Once the XSD (Majesco XML library) files are added to Microsoft Word, users can add the required tags to the document.
- The Tags appear on the document in a pink text balloon and have a starting and ending bracket. The tag should surround the boilerplate text.
- A XML tag is applied to a place holder or boilerplate and the boilerplate gets replaced with the value which the Tag fetches during runtime.
- One should use meaningful boilerplate text to represent the XML tag.

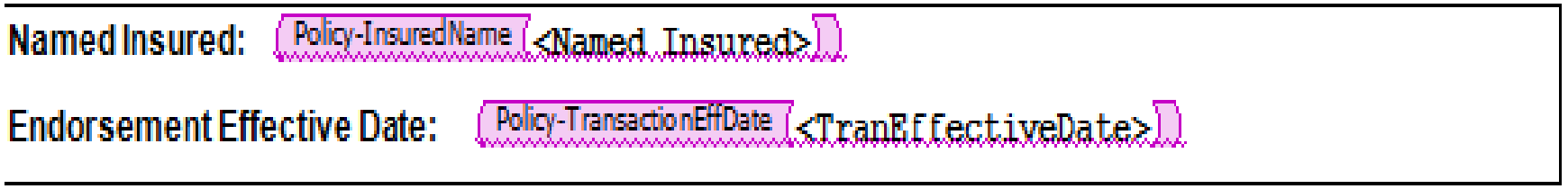
Sample Mail Merge Folder

- In XML Structure box right-click on a desired tag to set its Attributes.
- Following compressed file contains required XSD’s

Compressed
(zipped) Folder

Smart Tag Example

- Example – Smart Tag “Policy-InsuredName” is used to map the Named Insured. Boilerplate text for this Smart Tag can be <Named_Insured>



- Runtime Output is as follows when the boilerplate text is replaced with actual Insured Name from Policy:

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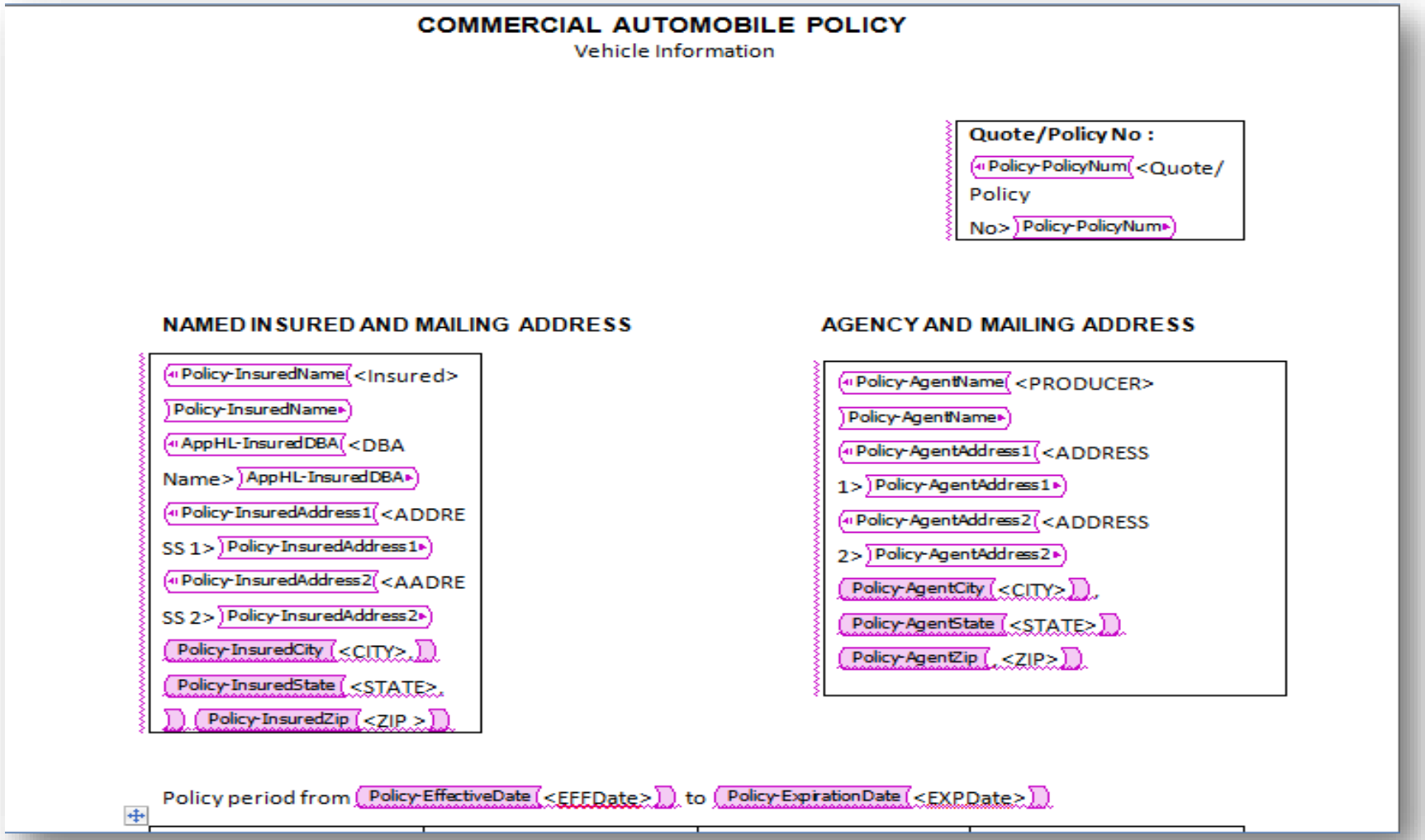
Smart Tag Example



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Design & Test Forms

- Please refer below document to design & test the forms.

Steps to Design Forms Template

Steps to Test Forms

Advanced XML Tags

- SQL,DATA , IMAGE and IF are the advanced XML Tags commonly used for mapping Variable data on the templates.
- To access the attributes of any XML Tag, right click the SQL tag and click on the "Attributes" menu. In the Dialog box that appears, users can select an attribute and type the value into the Value text box.

SQL & DATA Tags

- Whenever you have to retrieve data from database table we use SQL & DATA tags.
- SQL tag and DATA tags are complementary to each other.
- SQL tags have basic attributes like Query and ID. Query attributes holds the SQL query as value, which is executed against database.
- DATA tags are used to print result of query executed by SQL Tags.
- Data tags are applied to a boilerplate text.
- ID is a unique text for the SQL tag. The ID should be meaningful and related to data it prints.

SQL & DATA Tags

- Example : Want to retrieve vehicle data from MIS_VEHICLES

Vehicle No	Year	Make	Model
SQL DATA <VehicleNo> DATA	DATA <Year> DATA	DATA <Make> DATA	DATA <Model> DATA SQL

- Data Tags must be in the scope of the SQL tag it refers to. This means the SQL Tag should surround the DATA Tag.
- SQL and DATA Tags use some predefined expressions to be used in a Query or attribute.
- For each field in select clause, there should be one corresponding DATA tag.
  This means if a query is selecting three fields, there should be three data tags corresponding to each field.

Tag attributes

Function	Description
'${var:request('entityReference')}'	Is used in SQL queries added to the SQL tag for "query" attribute. Is replaced by an actual policy number during "Document Generation" process. Every query must use this expression in the “where” clause.
'${var:request('entityType')}'	Is used in SQL queries added to the SQL tag for "query" attribute. Is replaced by actual entity type during "Document Generation" process.
${var:sqlResult('queryID','fieldname')}	This expression is used in the DATA tag. Takes two parameters which need to be replaced by the user: ‘queryID' - This is the query ID of the corresponding SQL Tag 'fieldname' - This is the field name which is a part of select list of query in SQL Tag. This expression is responsible for replacing boilerplate text with the field name to which it refers.

IF Tags

- Majesco Policy provides "IF" tags for conditional mapping.
- IF tags and SQL tags are complementary to each other.
- IF tags are generally used as pair of two IF tags, one for a positive result and one for a negative result.
- An IF tag is not used for printing, but displays or hides the boilerplate text within it depending on success or failure of the condition.
- An IF tag should be surrounded by a SQL tag and should be within the scope of the SQL tag to which it refers.
- In DATA tag ‘${var:sqlResult(‘queryID’,’fieldname’)}’ an expression is used; the IF tag uses an expression as well – but in an IF tag, a comparison can be done for the value returned by the ‘${var:sqlResult(‘queryID’,’fieldname’)}’ expression.

IF Tags

- Example – IF Tag:
- First IF tag has a value 0= ${var:sqlResult('queryID','fieldname')}.
- Second IF tag has a value 0!= ${var:sqlResult('queryID','fieldname')}.
  If the first condition passes and ${var:sqlResult('queryID','fieldname')} returns 0 as a value then the boilerplate text of first tag will be displayed and second tag will be hidden.
- Generally, IF tags are used to conditionally display symbols which cannot be printed using DATA tags.
- Example – Checkboxes ☑ and ☐.

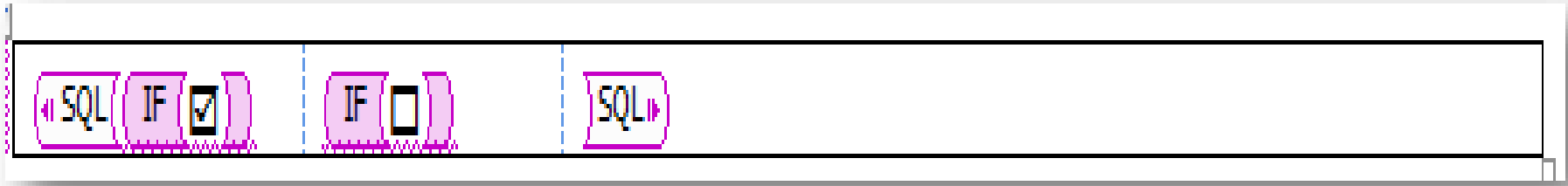

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Image Plugin & Image Tags

- Using image tag we can use images in form template.
- We need to add image in Dev-studio using image plugin and we can map those images in forms template using image tag.
- Image Plugin is used to insert any logo, signature or Barcode.
- Steps to add image in Dev-Studio :

https://confluence.majesco.com/display/MPCL/Images+Plugin

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THANK YOU!