

Oracle Insurance

**Data Capture
Palette User Guide**

Release 5.2

October 2014

Copyright © 2014, Oracle and/or its affiliates. All rights reserved.

Oracle Insurance Data Capture Palette User Guide

Release 5.2

Part # E56149-01

Library #E56152-01

October 2014

Primary Author: Mary Elizabeth Wiger

Contributing Authors: Laura Childers

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

CONTENTS

Preface	viii
Audience	viii
Related Documents	viii
Conventions	ix
System Requirements.....	ix
Manual History	ix
CHAPTER 1	
Overview of Data Capture Palette	10
Creation Process.....	11
Product Configuration and Palette Relationships	12
CHAPTER 2	
Products Page.....	13
Product Page Fields.....	14
Functionality	14
Editing Products	15
CHAPTER 3	
System Wide Functionality.....	16
Navigation	16
Records per Page Settings	16
Column Sorting	17
Searching	18
Help	19
Copying Content	19
CHAPTER 4	
Questionnaire.....	21
Fields.....	22
Functionality	22
New Questionnaires.....	22
Opening a Questionnaire	24
Manage Questionnaire Tabs.....	24
Column Layout Options	25
Default Submit Navigation	26
Locale.....	28
Customizing a Locale.....	29
Locale Settings.....	30

	Editing Questionnaires	33
	Deleting Questionnaires	34
CHAPTER 5		
	Risk Objects	35
	Risk Object Listing	36
	Functionality	36
	Risk Object Details	37
	Properties	37
	Editing	39
	Name Formats	40
	Deleting	42
CHAPTER 6		
	Tabs	43
	Fields	44
	Functionality	44
	New	44
	Searching	52
	Editing	54
	Deleting	55
	Working with a Tab in a Questionnaire	56
CHAPTER 7		
	Question Groups	57
	Fields	58
	Functionality	58
	New	59
	Searching	66
	Editing	67
	Deleting	69
CHAPTER 8		
	Questions	71
	Fields	71
	Functionality	73
	Searching	73
	Question Preparation	73
	Forming Questions	74
	Question Types	74
	Panel	75
	Parent/Trigger	75
	Postback	75
	Simple	76
	Table	76

New	76
General Tab Fields	78
Functionality	79
Answer Display Format	81
Fields.....	81
Control Properties	82
Behaviors	83
Function	84
Actions	86
Integration Activity.....	88
Answer Maps	92
Make Conditional	94
Display Condition	98
Help Text.....	99
Question Conditions.....	100
Question Visibility.....	100
Mapping IDs	101
Control Types.....	101
Editing	106
Copying Questions.....	107
Deleting	107
Questions in Worksite	109

CHAPTER 9

Releases	110
Fields.....	110
Functionality	111
Generate	112
Delete.....	113
Publish	114
View Risk Object Schema XML	116
View UI Config XML.....	117
View SSIX XML.....	118

CHAPTER 10

Workbench	119
Fields.....	120
Functionality	120
Add New Column	121

CHAPTER 11

Worksite	124
----------------	-----

SUPPORT

Contacting Support	126
--------------------------	-----

GLOSSARY

Glossary Terms..... 127

APPENDIX A

Question Condition Language 130
 Question Condition Language Usage 130
 Value Lookup 132
 <Object Reference> 132
 Object Reference Property Definitions 137
 <Property> 138
 <Property Values> 139
 <Operators> 139
 <Operator Values>..... 140

APPENDIX B

Question Behavior – Functions 142

APPENDIX C

Question Behavior – Action 151

APPENDIX D

Question Behavior – Activities 156

APPENDIX E

Question Behavior – Answer Maps..... 159

INDEX

Index 162

LIST OF FIGURES

FIGURE 1 OIDC PROCESS FLOW	11
FIGURE 2 PROJECT PAGE/HOME PAGE.....	13
FIGURE 3 PRODUCT RIGHT CLICK MENU	14
FIGURE 4 PRODUCT DESCRIPTION	15
FIGURE 5 EDITING A PRODUCT.....	15
FIGURE 6 PAGE SETTINGS FOR TABS	16
FIGURE 7 SORTING BY COLUMNS	17
FIGURE 8 SEARCHING FOR TABS	18
FIGURE 9 HELP	19
FIGURE 10 MANAGE QUESTIONNAIRE	21
FIGURE 11 CREATING A NEW QUESTIONNAIRE	23
FIGURE 12 SELECTING A QUESTIONNAIRE.....	24
FIGURE 13 TWO COLUMN LAYOUT	25
FIGURE 14 WORKSITE DEFAULT POLICY SUBMIT NAVIGATION	26
FIGURE 15 WORKSITE STANDARD NAVIGATION	27
FIGURE 16 LOCALE TAB	28
FIGURE 17 CUSTOMIZING LOCALE	29
FIGURE 18 RISK OBJECTS.....	35
FIGURE 19 RISK OBJECT LISTING.....	36
FIGURE 20 RISK CATEGORIES RIGHT CLICK MENU	36
FIGURE 21 RISK OBJECT DETAILS.....	37
FIGURE 22 RISK OBJECT PROPERTIES.....	38
FIGURE 23 RISK OBJECT PROPERTIES - NAME FORMAT.....	40
FIGURE 24 NAME FORMAT IN WORKSITE	40
FIGURE 25 RISK OBJECT FIELD (MID) OF A QUESTION	41
FIGURE 26 TABS	43
FIGURE 27 NEWTAB	45
FIGURE 28 QUESTIONNAIRE IN WORKSITE.....	46
FIGURE 29 ASSIGNING RISK OBJECTS	48
FIGURE 30 ASSIGNING QUESTION GROUPS	49
FIGURE 31 QUESTION GROUP ASSIGNMENT TAB - RISK SELECTION	50
FIGURE 32 QUESTION GROUP ASSIGNMENT TAB - QUESTION GROUP ASSIGNMENT	51
FIGURE 33 QUESTION GROUP ASSIGNMENT TAB - ASSIGNED QUESTION GROUPS.....	52
FIGURE 34 SEARCH UNASSIGNED QUESTION GROUPS	53
FIGURE 35 EDITING A TAB.....	54
FIGURE 36 DELETE CONFIRMATION MESSAGE.....	55
FIGURE 37 TABS IN WORKSITE	56
FIGURE 38 QUESTION GROUPS MAIN	57
FIGURE 39 QUESTIONNAIRE IN WORKSITE.....	59
FIGURE 40 CREATING A NEW QUESTION GROUP	60
FIGURE 41 CREATING NEW QUESTION GROUP SUCCESS MESSAGE	61
FIGURE 42 ASSIGNING QUESTIONS	62
FIGURE 43 ASSIGNING QUESTIONS TO THE QUESTION GROUP.....	63
FIGURE 44 ASSIGNING QUESTIONS TO A QUESTION GROUP.....	65
FIGURE 45 EDITING A QUESTION GROUP	67
FIGURE 46 UPDATING A QUESTION GROUP	68
FIGURE 47 DELETING A QUESTION GROUP	69
FIGURE 48 DELETE CONFIRMATION.....	70
FIGURE 49 MANAGE QUESTIONS.....	72
FIGURE 50 CREATING A NEW QUESTION	77
FIGURE 51 ANSWER DISPLAY FORMAT OF A QUESTION.....	81
FIGURE 52 CONTROL PROPERTIES OF A QUESTION	82

FIGURE 53 BEHAVIORS OF A QUESTION	83
FIGURE 54 QUESTION BEHAVIOR FUNCTION	84
FIGURE 55 QUESTION BEHAVIOR ACTION	86
FIGURE 56 QUESTION BEHAVIOR INTEGRATION ACTIVITY	90
FIGURE 57 QUESTION BEHAVIOR ANSWER MAP	92
FIGURE 58 SELECTING THE OPTIONS FOR MAKE CONDITIONAL	94
FIGURE 59 ENTERING A CUSTOM VALUE	95
FIGURE 60 MAKE CONDITIONAL FUNCTION ON A QUESTION	96
FIGURE 61 COMPLETED BEHAVIORS TAB	97
FIGURE 62 DISPLAY CONDITION COMPLETED	98
FIGURE 63 HELP TEXT ON A QUESTION	99
FIGURE 64 UPDATING A QUESTION	106
FIGURE 65 DELETING A QUESTION	108
FIGURE 66 DELETE CONFIRMATION	108
FIGURE 67 QUESTIONS IN WORKSITE	109
FIGURE 68 RELEASES	110
FIGURE 69 GENERATING A RELEASE	112
FIGURE 70 SUCCESSFULLY GENERATED RELEASE	113
FIGURE 71 DELETING A RELEASE	113
FIGURE 72 PUBLISHING A RELEASE	114
FIGURE 73 SUCCESSFUL PUBLISHED RELEASE	115
FIGURE 74 RISK OBJECT SCHEMA	116
FIGURE 75 UI CONFIG XML	117
FIGURE 76 SSIX SAMPLE XML	118
FIGURE 77 WORKBENCH, PROJECT LIST	119
FIGURE 78 ADDING NEW COLUMN TO PROJECT LIST	121
FIGURE 79 SELECTING RISK OBJECT FIELD	122
FIGURE 80 EDITING A RISK OBJECT IN PROJECT LIST	123
FIGURE 81 RE-ORDERING COLUMNS IN PROJECT LIST	123
FIGURE 82 DATA CAPTURE WORKSITE HOME	124
FIGURE 83 DATA CAPTURE WORKSITE HOME, PRODUCT & QUESTIONNAIRE SELECTED	125

PREFACE

Welcome to the Oracle Insurance Data Capture Palette User Guide. Oracle Insurance Data Capture (OIDC) is a web-based data capture application system built specifically for the insurance industry that streamlines data capture by allowing insurers to create and configure questions and rules through an intelligent front-end data capture web application. OIDC can be used by producers, CSRs, underwriters or applicants to enter information using an intelligent, rules-based interview approach.

OIDC can integrate with many systems, provide straight-through-processing and eliminate redundant entry. OIDC checks for accuracy and completeness and then accepts or knocks out depending on the answers.

OIDC consists of the following components:

- **Data Capture Worksite** - (Worksite) The front end application where users can work with projects, and create new applications, forms, requests or submissions.
- **Data Capture Palette** - (Palette) The back end workspace where questionnaires are created. A questionnaire can be an insurance application, a claims form, or any other input method that requires data to be captured and then used by other systems.

This guide explains the features and functionality of Palette.

AUDIENCE

This guide is intended for business users and others who create data capture questionnaires.

RELATED DOCUMENTS

For more information, refer to the following Oracle resources:

- The Oracle Insurance Data Capture series. You can view these guides at this address:
<http://www.oracle.com/technetwork/documentation/insurance-097481.html>
- The Oracle Insurance web site:
<http://www.oracle.com/industries/insurance/index.html>

CONVENTIONS

The following text conventions are used in this document:

Convention	Description
bold	Boldface type indicates graphical user interface elements associated with an action.
<i>Italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
Monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

SYSTEM REQUIREMENTS

For minimum operating system and hardware requirements, please see the Hardware Software requirements guide.

Manual History

New editions incorporate any updates issued since the previous edition.

Edition	Publication Number	Product Release	Publication Date	Comment
1 st Edition	P01-206-01	4.5	April 2011	
2 nd Edition	P01-206-02	5.0	August 2011	Features Update
3 rd Edition	P01-206-03	5.0.1	February 2012	Features Update
4 th Edition	P01-206-04	5.1.0	April 2013	Feature Update
5 th Edition	P01-206-05	5.1.1	November 2013	Feature Update
6 th Edition	P01-206-06	5.2	October 2014	Feature Update

OVERVIEW OF DATA CAPTURE PALETTE

Data Capture Palette (Palette) is the back end design time workspace where questionnaires are created. A questionnaire can be an insurance application, a claims form, or any other input method that requires data to be captured and then be used by other systems.

Palette Contents:

Palette is composed of multiple areas where you create the various questionnaire components. You begin by selecting the product where you want to work. Next you can create a new questionnaire or select an existing questionnaire to work in. Each product can have one or more questionnaires. Opening the questionnaire will allow you to design and edit the components that are unique to that questionnaire.

These areas work in combination to create a questionnaire of your design. The main components of Palette are:

- **Product** - Holds a list of current products that have been implemented from product configuration basic system information for each product.
- **Questionnaire** - Holds a list of current questionnaires per product and the basic system information for each questionnaire.
- **Risk Objects** - This area contains the risk objects for the product. A Risk Object is the insured or property that data is being collected on. Risk Objects are set up in product configuration.
- **Tabs** - This is where you create the tabs that will be displayed on the questionnaire. Tabs will contain the questions groups that you have created along with the basic navigation buttons.
- **Question Groups** - This is where you categorize questions together into like minded groups. Question groups contain the questions that you have created.
- **Questions** - Questions that are asked on the questionnaire are created and edited here. The Questions tab also is where the answer fields used by the questions are created and edited. Questions and answers are created from the fields defined in the product object model. Additional questions that are specific to data capture only can be created in Palette.
- **Releases** - The final stage when creating a questionnaire is creating a release. A release is the packaging of the XML representation of the questionnaire.
- **Workbench** - Workbench is where you manage the columns that will be displayed on the workbench.
- **Help** - Displays the most recent version information, the database being used and context information.

CREATION PROCESS

1. Begin in Product Configuration (PC) by creating the product you want to use. This would include all of the objects and fields that were defined in the business object model that was used to generate the product object model version. Product Configuration Product Implementation publishes the product definition to Palette, and creates the appropriate objects and field-based questions.
2. Next move to Palette to define the components of the questionnaire. This is where you create or select the questionnaire, tabs, question groups, questions you want to use.
3. Create a questionnaire release and the published questionnaire is populated to Workbench.

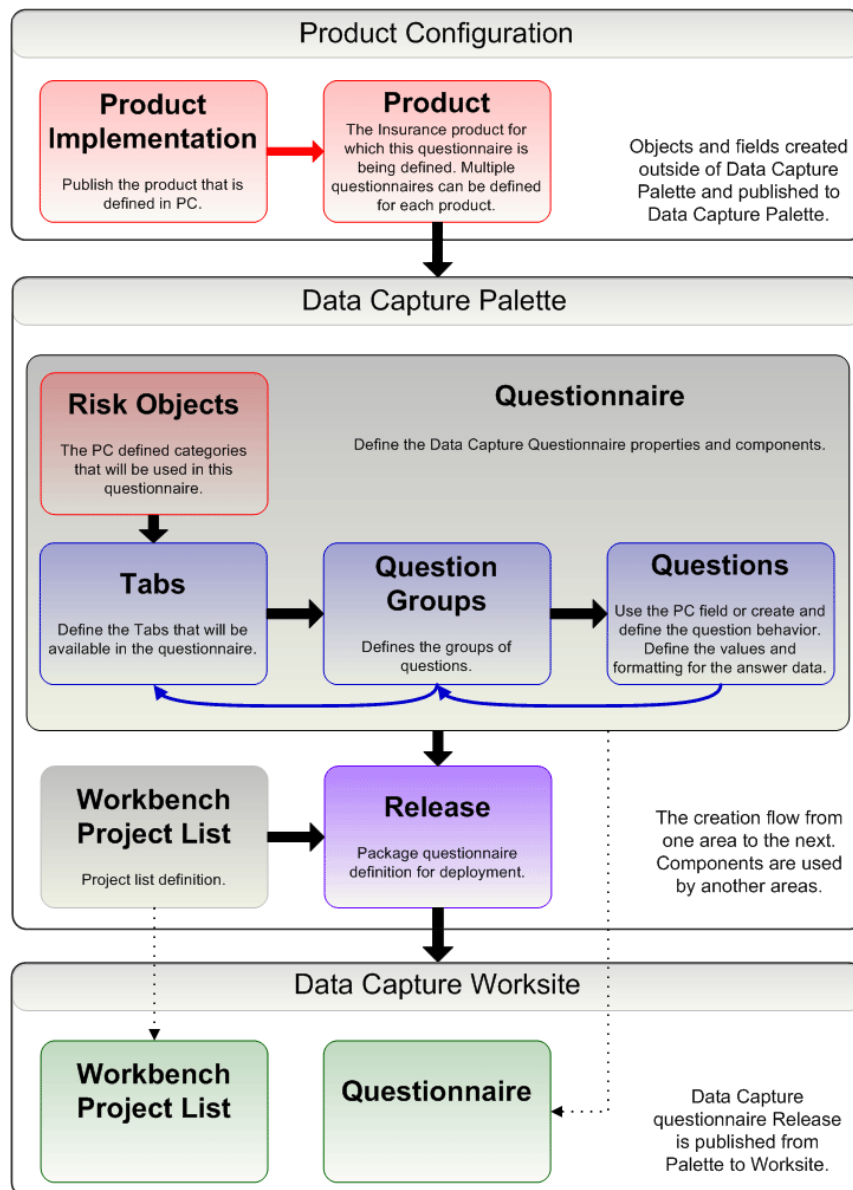


Figure 1 OIDC Process Flow

There are many possible ways to create a questionnaire. The recommended creation process allows you to create a base element and then fine tune the other elements involved. This way, as you move back and forth between tabs, questions, question groups and answer maps, you will create the questionnaire that meets your needs.

Product Configuration and Palette Relationships

Product Configuration and Palette objects have relationships and dependencies throughout the system.

- **Products** - Products created in PC are also created in Palette when the product object model version is published to data capture using Product Implementation.
- **Objects** - Objects created in PC are also created in Palette when the product object model version is published to data capture using Product Implementation.
- **Fields** - Fields created in PC are created as Questions in Palette when the product object model version is published to data capture using Product Implementation.

Palette Requirements:

Palette is populated with content from Oracle Insurance Product Configuration (PC). Product Configuration is the business modeling tool that allows you to create a re-usable schema that defines your insurance product. Creation of the business model must be done prior to any work being performed in Palette.

You must have content published to Palette before any work can be started.

PRODUCTS PAGE

The Products page is where you select the product where you want to create a questionnaire. Products act as classifications that allow you to distinguish questionnaire sources and create questions and question groups unique to that product. Products can represent the actual lines of business your company handles or any classification that you want to use. Products are defined in Product Configuration.

You must select a product for each questionnaire created. There are two areas on the Products page:

- **Available Products** - The Available Products area lists the products where a questionnaire can be created. Each product has a right click menu of the options available.
- **Product Details** - The Product details area contains the details of the product selected in the Available Products area. The selected product is listed at the top of the area.

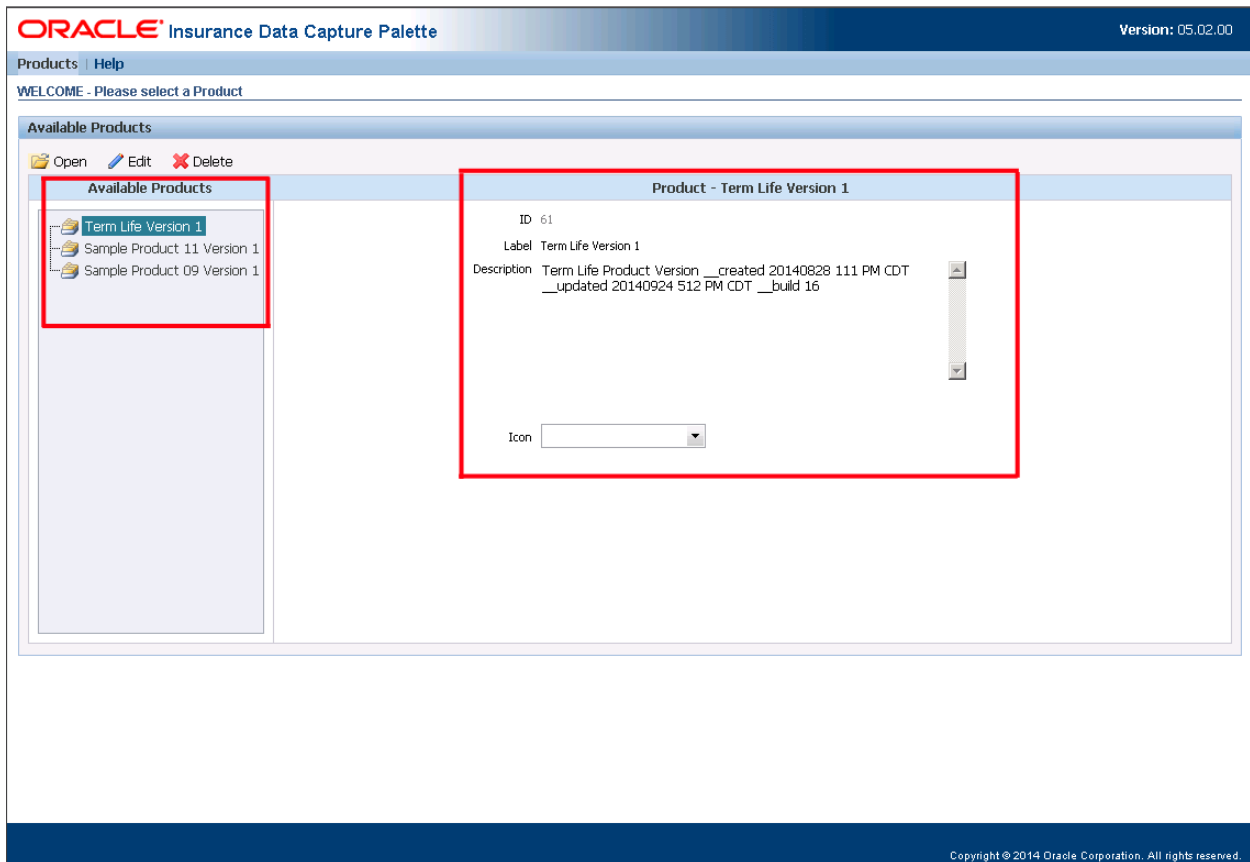


Figure 2 Project Page/Home Page

PRODUCT PAGE FIELDS



The properties for the selected project are displayed in the Project Details area on the right side of the screen. In Palette, only the icon field can be updated. There are four fields for each project:

- **ID** - This is a system generated ID number. This is an information only field and cannot be changed in either Palette or Product Configuration.
- **Label** - The descriptive text that is displayed for this project. This field can be edited in Product Configuration only.
- **Description** - The description of the product. This field can be edited in Product Configuration.
- **Icon** - You can choose a display icon from the system-defined list. Icons cannot be added to this list. If no icon is selected, the default icons are used.

FUNCTIONALITY

The Product page has menu options located at the top of the screen and right click menus on each project listed in the Available Projects area.

Menu Options:

 Open	Opens the project.
 Edit	Edits the selected project.
 Delete	Deletes the selected project.

Right Click Options:

Products listed in the Available Products area have a right click menu with the same options as the menu bar; Open, Edit, and Delete. To view the right click menu options, select the product where you want to work and right click.

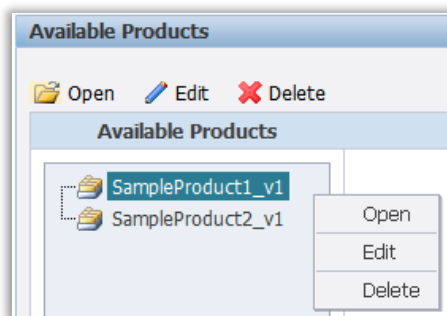


Figure 3 Product Right Click Menu

Viewing the Description:

To view the product description, hover your cursor over the product. An information field is displayed.

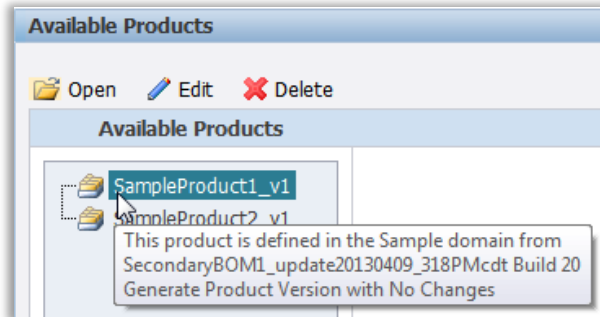


Figure 4 Product Description

EDITING PRODUCTS

In Palette, only product icons can be edited. Any other changes to the Product must be made in PCP.

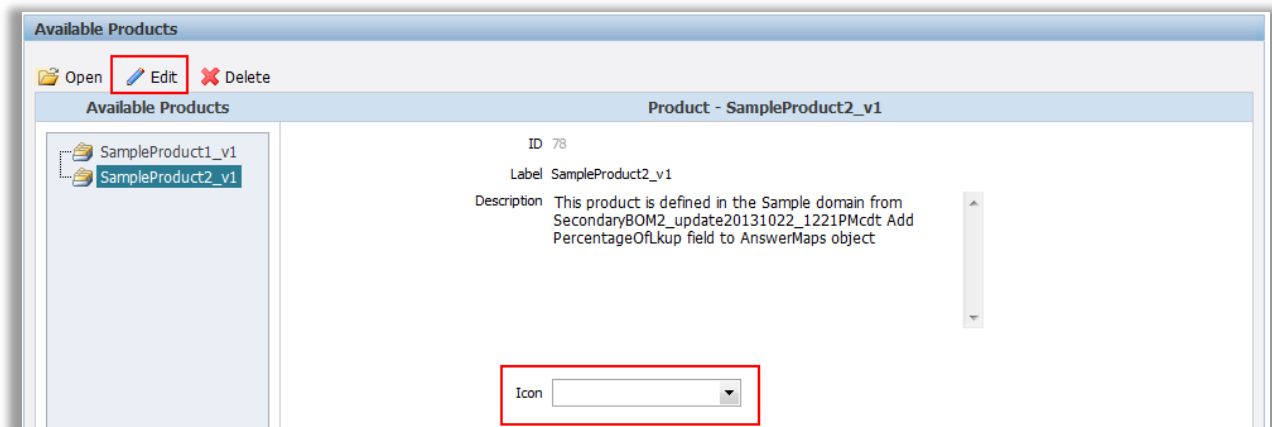


Figure 5 Editing a Product

To Edit:

1. Select product you want to edit.
2. Right click and select **Edit** or click **Edit** in the menu bar.
3. Select the icon you want to use.
4. Click **Update** to save changes.

Items that are grayed out, such as the ID, Label and Description must be edited in Product Configuration.

SYSTEM WIDE FUNCTIONALITY

OIDC has functionality that applies throughout the system regardless of what product or questionnaire you are in. Functionality includes setting the records displayed per page, column sorting, and searching.

NAVIGATION

System wide there is common navigation. Page settings and column sorting work the same on any screen where these functions are available.

Records per Page Settings

Records per Page settings can be set on Tab, Questions Groups, Questions, and Releases screens. Page settings allow you to set the number of records you want displayed per page. The records selector on most screens allows for 10, 25, 50, 75 or 100 records per page. A smaller number will eliminate scrolling on the page. A larger number will require scrolling but allow you to view a greater selection.

Selections do not apply to all screens.

If more than one page of tabs, question groups, questions, or answer maps is present, pages numbers will be displayed in the lower left corner of the screen. To go to another page, click the underlined page number. You can select any page at any time.

The screenshot shows the Oracle Insurance Data Capture Palette interface. At the top, it says 'ORACLE Insurance Data Capture Palette' and 'Version: 05.02.00'. Below that are navigation tabs: 'Products | Questionnaire | Risk Objects | Question Groups | Questions | Workbench | Help'. The main content area is titled 'Product - Term Life Version 1' and 'Manage Question Groups'. There is a search bar and a dropdown menu for 'Records per page' which is currently set to 25. Below this is a table with columns: Edit, Assign, ID, Risk Object, Name, and Display Text. The table contains 13 rows of data.

Edit	Assign	ID	Risk Object	Name	Display Text
		1242	TermLife.Policy	CompanyPlan	Company and Plan
		1243	TermLife.Coverage	BaseCoverage	Base Coverage
		1244	TermLife.Coverage	SupplementalCoverages	Supplemental Coverages
		1245	TermLife.Coverage	Replacement	Replacement
		1246	TermLife.Agent	Agent	Agent
		1247	TermLife.Agent.Address	AgentAddress	Agent Address
		1248	TermLife.Insured	Applicant	Applicant
		1249	TermLife.Owner	Owner	Owner
		1250	TermLife.Owner.Address	OwnerAddress	Owner Address
		1251	TermLife.Beneficiary.Address	BeneficiaryAddress	Beneficiary Address
		1252	TermLife.Payment	Payment	Payment
		1253	TermLife.Policy	Summary	Summary
		1254	TermLife.Policy	Submit	Submit
		1255	TermLife.Policy	Beneficiaries	Beneficiaries
		1256	TermLife.Owner	Beneficiaries	Beneficiaries

Figure 6 Page Settings for Tabs

Column Sorting

Columns can be sorted on Tabs, Questions Groups, Questions, and Releases screens.

You can sort fields by individual column headers.

- Alphabetically (A to Z)
- Alphabetically (Z to A)
- Numerically (lowest to highest)
- Numerically (highest to lowest)
- Date (Newest first) for Releases

ORACLE Insurance Data Capture Palette Version: 05.02.00

Products | Questionnaire | Risk Objects | Question Groups | Questions | Workbench | Help

Product - Term Life Version 1

Manage Question Groups

[Add New Group](#)

Search Records per page: 25

Edit	Assign	ID	Risk Object	Name	Display Text
		1242	TermLife.Policy	CompanyPlan	Company and Plan
		1243	TermLife.Coverage	BaseCoverage	Base Coverage
		1244	TermLife.Coverage	SupplementalCoverages	Supplemental Coverages
		1245	TermLife.Coverage	Replacement	Replacement
		1246	TermLife.Agent	Agent	Agent
		1247	TermLife.Agent.Address	AgentAddress	Agent Address
		1248	TermLife.Insured	Applicant	Applicant
		1249	TermLife.Owner	Owner	Owner
		1250	TermLife.Owner.Address	OwnerAddress	Owner Address
		1251	TermLife.Beneficiary.Address	BeneficiaryAddress	Beneficiary Address
		1252	TermLife.Payment	Payment	Payment
		1253	TermLife.Policy	Summary	Summary
		1254	TermLife.Policy	Submit	Submit
		1255	TermLife.Policy	Beneficiaries	Beneficiaries
		1256	TermLife.Owner	Beneficiaries	Beneficiaries

Copyright © 2014 Oracle Corporation. All rights reserved.

Figure 7 Sorting by Columns

To sort by a different column header, click the column header you want to sort by and the current results will be resorted. Information will be sorted either alphabetically or numerically, depending on the column header. You can sort results as many times as you want. The first click will sort A-Z or lowest to highest. The second click will reverse the order, Z-A or highest to lowest.

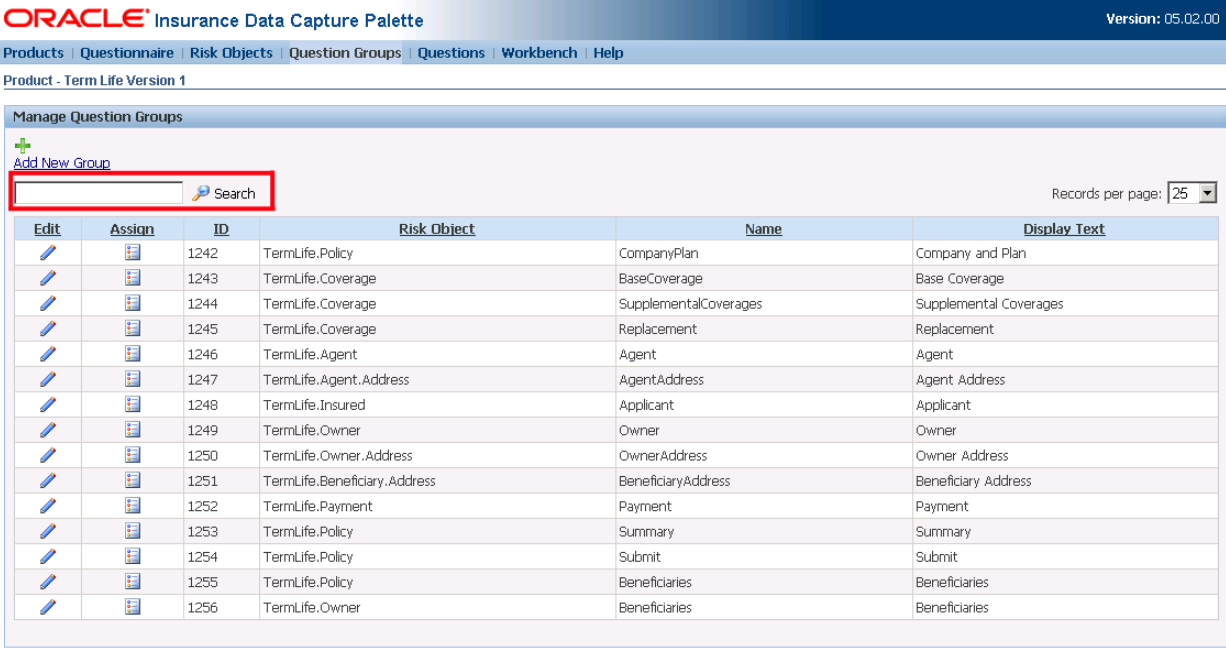
Sorting does not filter results. It only rearranges the order in which they are displayed.

Searching

Manage Questionnaire, Tabs, Question Groups, Questions, and Releases all contain a Search function. Search allows you to search for a specific element within the screen selected.

Searches are done against the columns listed or descriptions and IDs. The results returned will be the elements that meet the search criteria. Searches are done against the entire tab and will return every element that meets the search criteria.

Searching can be done at any time and does not affect the elements you have already selected.



ORACLE Insurance Data Capture Palette Version: 05.02.00

Products | Questionnaire | Risk Objects | Question Groups | Questions | Workbench | Help

Product - Term Life Version 1

Manage Question Groups

+ Add New Group

Search Records per page: 25

Edit	Assign	ID	Risk Object	Name	Display Text
		1242	TermLife.Policy	CompanyPlan	Company and Plan
		1243	TermLife.Coverage	BaseCoverage	Base Coverage
		1244	TermLife.Coverage	SupplementalCoverages	Supplemental Coverages
		1245	TermLife.Coverage	Replacement	Replacement
		1246	TermLife.Agent	Agent	Agent
		1247	TermLife.Agent.Address	AgentAddress	Agent Address
		1248	TermLife.Insured	Applicant	Applicant
		1249	TermLife.Owner	Owner	Owner
		1250	TermLife.Owner.Address	OwnerAddress	Owner Address
		1251	TermLife.Beneficiary.Address	BeneficiaryAddress	Beneficiary Address
		1252	TermLife.Payment	Payment	Payment
		1253	TermLife.Policy	Summary	Summary
		1254	TermLife.Policy	Submit	Submit
		1255	TermLife.Policy	Beneficiaries	Beneficiaries
		1256	TermLife.Owner	Beneficiaries	Beneficiaries

Copyright © 2014 Oracle Corporation. All rights reserved.

Figure 8 Searching for Tabs

To Search:

1. Enter your search criteria in the search window.
2. Click the search icon at the end of the field. Results will be displayed in the body of the screen.

To clear the field, clear the search field and search against a blank field. This will return all available elements.

Help

The Help option displays:

- Current Version
- Databases being utilized

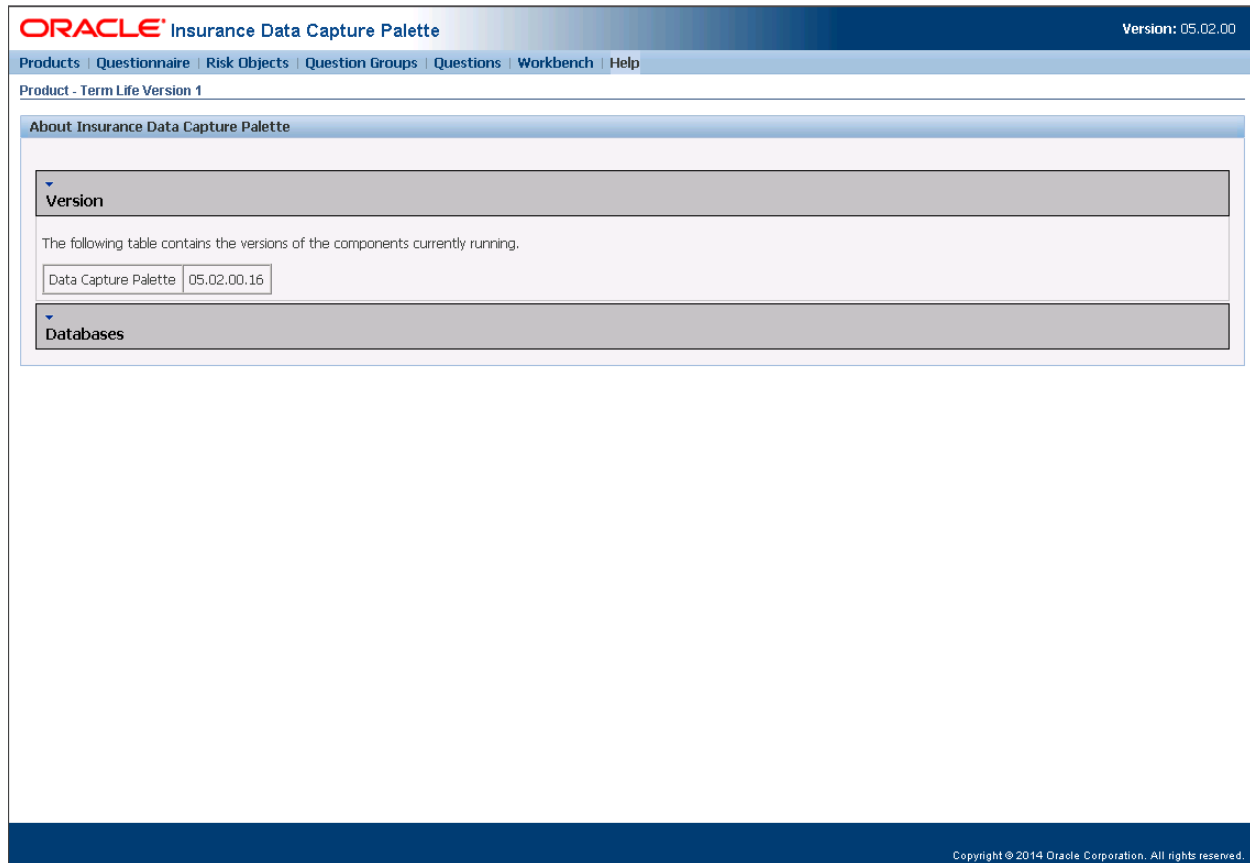



Figure 9 Help

To view information, click the expand icon  in front of the option you want to view.

Copying Content

On screens where you can view XML, such as Releases and Questions, you will not be able to use your mouse right click features to copy however, you can use your keyboard controls. Highlight the text you wish to cut or copy. Use the Control Key plus the letter key to either "C" copy or "X" cut. Position your cursor where you want your text to be placed. Use the Control Key plus the letter key "V" to paste.

- **Control + X** will cut text.
- **Control + C** will copy text.
- **Control + V** will paste text.
- To go to the beginning of an entry, use the home key on your keyboard.
- To go to the end of an entry, use the end key on your keyboard.

On some screens, you will be able to paste text back in to the screen. In Releases, you will be able to copy content only from:

- View Risk Object Schema XML
- View UI Config XML
- View SSIX XML

You will be able to paste the copied text into another program for easier viewing. You will not be able to paste any content back into these screens.

QUESTIONNAIRE

Opening a product will place you on the Manage Questionnaire screen. Manage Questionnaire allows you to create, edit and delete questionnaires for the selected product. From here you can:

- Create a new questionnaire
- Select to work on an existing questionnaire
- Clone an existing questionnaire
- Delete an existing questionnaire

Once you select a questionnaire, you will have access to the configuration components and to the questionnaire specific elements, Tabs and Releases as well as Workbench options.

ORACLE Insurance Data Capture Palette Version: 05.02.00

Products | Questionnaire | Risk Objects | Question Groups | Questions | Workbench | Help

Product - Sample Product 09 Version 1

Manage Questionnaires

Search + New 📁 Open 🔗 Clone ✖ Delete

Selection	Name	Label	Last Release Label	Last Release Date
<input type="checkbox"/>	SampleQuestionnaire1	Questionnaire 1 Data Capture Features Lite	Q1r01 - 5.2.0 build 16	Sep 25 2014 11:53AM

Copyright © 2014 Oracle Corporation. All rights reserved.

Figure 10 Manage Questionnaire

All questionnaires must be created. There are no default questionnaires that come with the system.

FIELDS

The Manage Questionnaire screen has a tool bar at the top of the screen and a listing of all current questionnaires for the product. Questionnaires are listed from newest to oldest with the newest at the top of the list. There are five fields for each questionnaire:






- **Selection** - Check this box to select the questionnaire.
- **Name** - The name of the questionnaire.
- **Description** - The description of the questionnaire.
- **Last Release Label** - The descriptive label of the last release for this questionnaire.
- **Last Release Date** - The date of the last release for this questionnaire.

FUNCTIONALITY

The Manage Questionnaire screen has menu options located at the top of the screen. There are no right click menus.

Menu Options:

There are four menu items in the top bar menu.

 Search	Searches the screen for the criteria that have been entered.
 New	Creates a new Questionnaire.
 Open	Opens the Questionnaire.
 Clone	Clones the Questionnaire
 Delete	Deletes the selected Questionnaire.

NEW QUESTIONNAIRES

New Questionnaires can be created at any time.

To Create a New Questionnaire:

1. Open the product where you want to create a new questionnaire. This places you on the Manage Questionnaire screen for the product.

- Click **New**. The screen refreshes with the Properties tab for the new questionnaire. The Properties tab is part of the configuration file components for the questionnaire. The Properties tab has a Name field that is required to create a new questionnaire. Fields with a red asterisk (*) are required.

The screenshot shows the 'New Questionnaire' form in the Oracle Insurance Data Capture Palette. The form is titled 'New Questionnaire' and has two tabs: 'Properties' and 'Locale Settings'. The 'Properties' tab is active and contains the following fields:

- Name:** A text input field with a red asterisk (*) indicating it is required.
- Label:** A text input field.
- Question Layout Type:** A dropdown menu currently set to 'Two Column'.
- Enable Default Submit Navigation:** A checked checkbox.

At the bottom of the form are two buttons: 'Create' and 'Cancel'.

Copyright © 2014 Oracle Corporation. All rights reserved.

Figure 11 Creating a New Questionnaire

- Enter the **Name information**. The field is limited to 30 alpha numeric characters. Spaces can be used as well as the special characters underscore (_) and period (.). You can edit the Name field prior to publishing the first release. This field is required.
- Enter a **Label**. The label that will be displayed in Questionnaire. A brief description of the questionnaire. This field is limited to 50 characters. Alpha numeric, special characters, and spaces are allowed.
- Select the **column layout** for the questionnaire.
- Check if you want to **enable default submit navigation**.
- Click **Create**. The screen displays a success or failure message. Click **OK**. You must correct any errors to continue.

You can now work on the elements of this questionnaire, such as risk objects and tabs. The Locale tab can be updated now or at a later time. The default locale from the server is used.

NOTE: *It is strongly recommended that you do not change the Name Information after the release has been published.*

Opening a Questionnaire

Once a questionnaire has been created, it will be listed on the Manage Questionnaires screen. Questionnaires will be listed from newest to oldest with the newest at the top of the list.

1. Check the **Selection** box of the questionnaire where you want to work. Only one questionnaire at a time can be selected.

ORACLE Insurance Data Capture Palette Version: 05.02.00

Products | Questionnaire | Risk Objects | Question Groups | Questions | Workbench | Help

Product - Sample Product 09 Version 1

Manage Questionnaires

Search + New Open Clone Delete

Selection	Name	Label	Last Release Label	Last Release Date
<input checked="" type="checkbox"/>	SampleQuestionnaire1	Questionnaire 1 Data Capture Features Lite	Q1r01 - 5.2.0 build 16	Sep 25 2014 11:53AM

Copyright © 2014 Oracle Corporation. All rights reserved.

Figure 12 Selecting a Questionnaire

2. Click **Open** in the top bar menu. The screen refreshes with the Properties tab for the selected questionnaire. Once you have opened a questionnaire, you can edit the configuration file components of the questionnaire or select an option from the top bar menu.

MANAGE QUESTIONNAIRE TABS

Opening a selected questionnaire places you on the Properties tab. The Properties tab is one of two tabs found in the Manage Questionnaire area. These tabs hold configuration file components for the selected questionnaire.

There are default values in the Locale tab.

Column Layout Options

Question Layout Type allows you to display multiple columns on a questionnaire in Worksite. This can be helpful when you have a questionnaire where you want to see more than one column and reduce scrolling. When using multi column layout, there are a few things you should keep in mind.

1. The length of your question. The longer the question, the more likely it is that it will wrap. Wrapping does not affect the way the question behaves. Wrapping will affect the way the question is displayed on the page. It may wrap but be visually unattractive.
2. The order in which you want the questions to appear. You should have some idea of what order you want to place your questions and in what column you want them to be displayed. Strategically placing questions may require inserting blank questions. The use of blank questions can force a question in to the order you want.

The screenshot shows the Oracle Insurance Data Capture Workbench interface. At the top, the user is identified as 'superBA' with the role 'AdminRole' and team 'DEVTest'. The breadcrumb trail is 'Workbench > Project'. The user's name 'David Davidson' is displayed. Below this, there are tabs for 'Insured Info', 'Coinsured Info', 'Basic Features', and 'Submit'. The main content area is titled 'Questionnaire' and contains a section for 'Insured Personal Information'. This section is divided into two columns. The first column contains the following fields: First Name (David), Last Name (Davidson), Date of Birth (03/23/1972), Age (41), and Occupation (Analyst). The second column contains: Middle Name (D), Gender (Male), Marital Status (Married), and Opt Out (Do Not Solicit) (checked). At the bottom of the form, there are navigation buttons: '<< Back', 'Next >>', and 'Submit Policy'.

Figure 13 Two Column Layout

Default Submit Navigation

Every questionnaire has some default navigation. Tabs may contain one or more navigation buttons:

- **Next** - Takes you to the next tab.
- **Back** - Returns you to the previous tab.
- **Submit Policy** - Submits the data gathered in the questionnaire to the target system.

Using Policy Submit Navigation:

When default policy submit navigation is used (`EnableDefaultPolicySubmitNavigation = true`), the expectation is that the last tab will trigger the submit activity. The Submit Policy button will be active on the last object instance on the next to last tab.

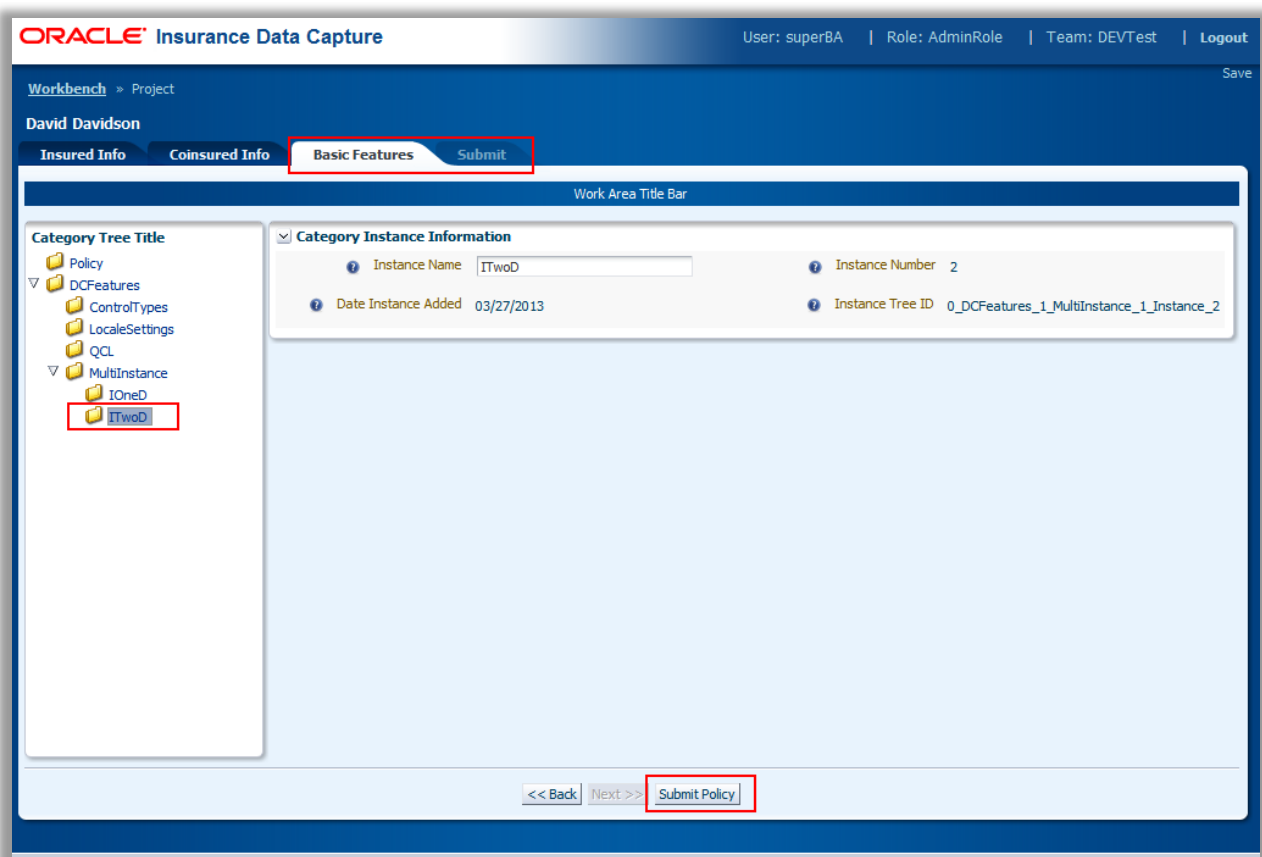


Figure 14 Worksite Default Policy Submit Navigation

Using Standard Navigation:

When default policy submit is not used (EnableDefaultPolicySubmitNavigation = false), there will be no Submit Policy button.

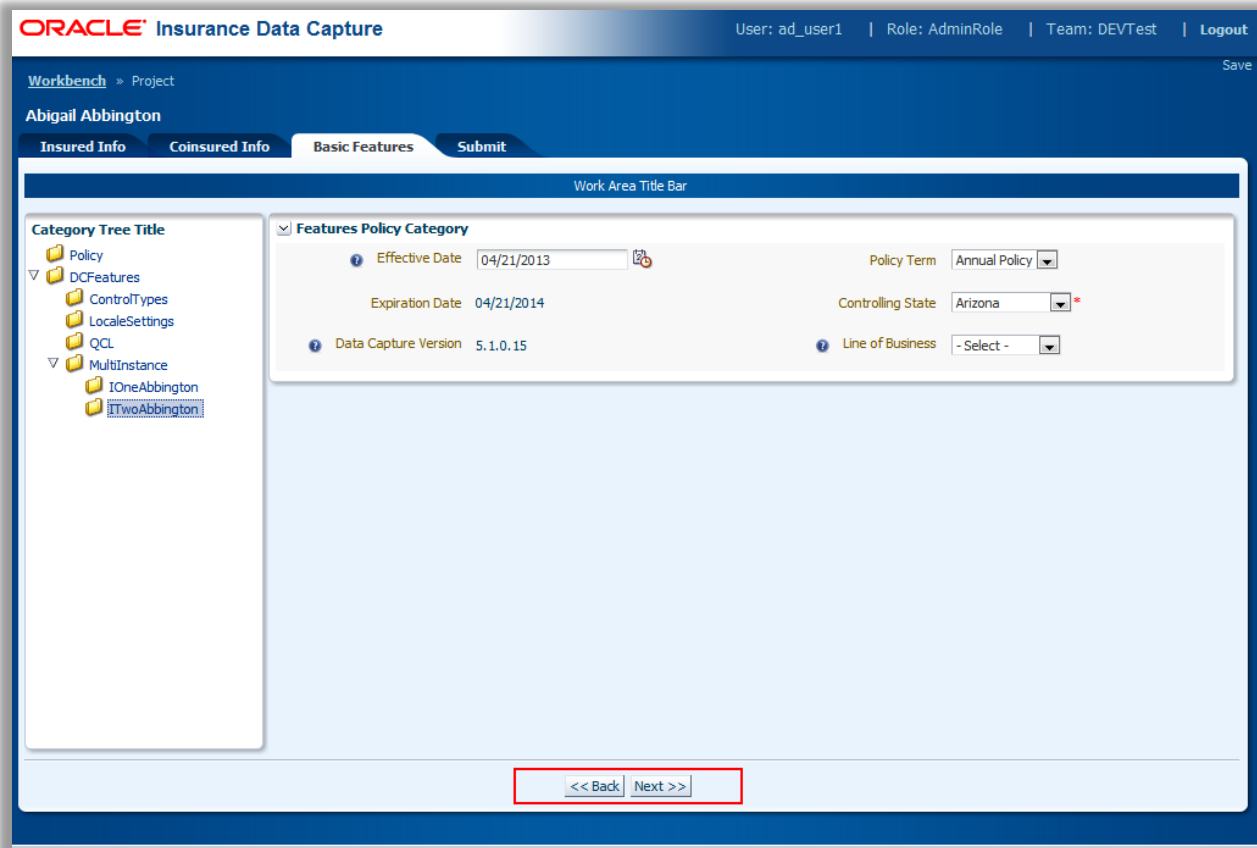


Figure 15 Worksite Standard Navigation

Locale

Locale is defined as the unique attributes of a location including the formatting of numbers, currency, time, date, phone numbers and tax identification numbers. The default locale will be US English. The default can be changed on the questionnaire. Administrators can change the default by editing the locale file on the server where Palette is installed. Every new questionnaire will assume the default locale.

Locale settings will be used if a field is identified as a number, currency, time, date, phone number or tax identification number in an Answer Map. The fields will automatically follow the settings defined by the locale of the questionnaire. Questionnaires must have a locale.

ORACLE Insurance Data Capture Palette Version: 05.02.00

Products | Questionnaire | Risk Objects | Tabs | Question Groups | Questions | Releases | Workbench | Help

Product - Sample Product 09 Version 1 | Questionnaire: SampleQuestionnaire1

Manage Questionnaires - SampleQuestionnaire1

Properties | **Locale Settings**

Locale Selection and Customization

Locale: en-US

Sample Formatting

Number	123,456,789.5
Currency	\$ 123,456,789.50
Negative Currency	(\$ 123,456,789.50)
Time	1:26:58 PM
Short Date	10/13/2014
Local Phone	(555)-444-4444
Long Distance Phone	1-(555)-444-4444
International Phone	8888-1-(555)-444-4444
Personal Tax ID	666-66-6666
Business Tax ID	33-3333333

Copyright © 2014 Oracle Corporation. All rights reserved.

Figure 16 Locale Tab

The Locale tab has two sections:

- The **Locale selector** located at the top of the tab. The current locale used by the questionnaire will be shown. You can select another locale from the list. After you have made your selection, click **Update** to save your choice.
- The **Sample Formatting** located in the middle. The default settings of the current locale will be displayed in the sample area. This area is for display only. You cannot make updates here.

Customizing a Locale

After selecting a locale, the default number, currency, time, date, phone number and tax identification number formats will be automatically displayed in the Sample area. To customize the settings, click **Customize** next to the Locale selector. A separate screen will be displayed.

Numbers	
Decimal symbol:	<input type="text" value="."/> *
Digit grouping symbol:	<input type="text" value=","/> *
Digit format pattern:	<input type="text" value="#,#0.###"/> *
Negative sign symbol:	<input type="text" value="-"/> *
Currency	
Currency symbol:	<input type="text" value="\$"/> *
Positive currency format:	<input type="text" value="¤n"/> * ¤ represents the currency symbol
Negative currency format:	<input type="text" value="(¤n)"/> * ¤ represents the currency symbol
Time	
Time format:	<input type="text" value="h:mm:ss a"/> * 'a' represents the AM/PM symbol
Date	
Date format:	<input type="text" value="MM/dd/yyyy"/> *
Phone	
Local phone number:	<input type="text" value="(aaa)-nnn-nnnn"/> *
Long distance phone number:	<input type="text" value="c-(aaa)-nnn-nnnn"/> *
International phone number:	<input type="text" value="xxxx-c-(aaa)-nnn-nnnn"/> *
Tax ID	
Personal tax ID / SSN:	<input type="text" value="nnn-nn-nnnn"/> *
Business tax ID / EIN:	<input type="text" value="nn-nnnnnnn"/> *
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

Figure 17 Customizing Locale

Locale Settings

The current locale settings will be displayed. These values can be updated and you will be allowed to type in an alternate value on select fields if you choose. You must have a value in each field.

Formats are for display purposes. Data is not stored in any designated format.

Numbers

Number formats will be used for any field identified as a number. If you want to create a number that does not use the locale number format, such as a ZIP code or house number, use the text field answer map and define the values as numeric.

- **Decimal symbol** - The decimal symbol indicates the integral part of a number from the fractional part. For example, 10.25 (using a period as the decimal symbol) or 8,50 (using a comma as the decimal symbol).
- **Digit grouping symbol** - The digit grouping symbol indicates the symbol that will be used to show the thousands separator. For example, 1,000 (using a comma as the digit grouping symbol) or 1.000 (using a period as the digit grouping symbol). Digit grouping is by the thousandths only.
- **Digit format pattern** - The digit format pattern is used for decimal precision and the location of the zero position.

Decimal precision is the number of places you want displayed for any decimal value.

The zero position is the last position of the zero value. You can set the placement of the zero value to be prior to the decimal symbol, for example a digit format `#,##0.##` would display the entry 5.001 as 5. Or you can set the placement of the zero value to be after the decimal symbol. For example, a digit format of `#,###.#0` would display the entry 120 as 120.00.

To enter the digit format, enter a 0 in the last place where you want to display a zero value. Enter a pound sign (#) for every numeric value you want displayed after the decimal symbol.

Where:

- **First line #** equals the preceding numbers
- **,** represents the digit grouping symbol
- **0** equals the zero position of the number
- **.** represents the decimal symbol
- **End line #** equals the decimal precision

NOTE: Do not change the decimal or digit grouping symbols in the digit format pattern. The decimal symbol is for visual confirmation only. The digit grouping symbol can be removed if you do not want to display a digit grouping. Unless deleted, the digit grouping symbol and the decimal symbol entered in the respective fields are the elements that will be used in the questionnaire.

- Most separators, i.e. comma (,), period (.), or space () will be allowed.
- Do not use the same separator for the decimal and digital. The separators should be different.
- Only one separator per entry. You will not be able to enter a space () for the millions separator and then a comma (,) for the thousands separator. You will have to select either the space or the comma.

- **Negative sign symbol** - This is the sign used to denote negative numbers.

Currency

Currency format will be used for any field identified as a currency.

- **Currency symbol** - the symbol to designate the currency being used. Symbols can be any value up to 10 digits.
- **Positive currency format** - the format of positive currency values. You can select a format from the list. There are four options:
 - **¤n** - The currency symbol immediately before the value
 - **n¤** - The currency symbol immediately after the value
 - **¤ n** - The currency symbol one space in front of the value
 - **n ¤** - The currency symbol one space after the value
- **Negative currency format** - the format of negative currency values. You can select a format from the list. There are 16 options:

Where:

- **¤** - Represents the currency symbol
- **n** - Represents the numeric value
- **()** - The numeric value will be placed in parenthesis
- **-** - Will place a dash (-) in the numeric value
- - A single space may be in front or after the numeric value

Time

Time format will be used for any field designated as a time.

- **Time format** - the format of the time being displayed. You can select a time value from the list or enter your own format.

Where:

- **H or h** - The hour
- **m** - The minute
- **s** - The second
- **a** - AM/PM indicator
- The lower case **h** represents a 12 hour clock.
- The capital **H** represents a 24 hour clock.

NOTE: Any custom time value will be added to the list of available selections.

Date

Date format will be used for any field designated as a date.

- **Date format** - the format of the date being displayed. You can select a format from the list or enter your own format.

Where:

- **M** - The month
- **d** - The date
- **y** - The Year. You can use a 4 digit entry YYYY or a 2 digit Year entry YY

- A separator does not have to be used
- Static values are allowed

Phone Number

Phone number format will be used for any field designated as a phone number. Phone fields will have specific phone formats that need to be entered. Phone numbers can be up to 22 digits including separators.

- **Local phone number** - the format of the local phone number being displayed. You can enter your own format.
- **Long Distance phone number** - the format of the long distance phone number being displayed. You can enter your own format.
- **International phone number** - the format of the international phone number being displayed. You can enter your own format.

Where:

- **x** - The country code
- **c** - The long distance
- **a** - The area code indicator
- **n** - The local number

- The only separator allowed is the dash (-)
- A separator does not have to be used

Tax Identification Number

Tax identification format will be used for any field designated as a SSN. Tax identification fields will have specific SSN formats that need to be entered. Tax identification numbers can be up to 22 digits including separators.

- **Personal tax ID/SSN** - the format of the personal tax ID/SSN being displayed. You can enter your own format.
- **Business tax ID/EIN** - the format of the international phone number being displayed. You can enter your own format.

Where:

- **n** equals the number
- The only separator allowed is the dash (-)
- A separator does not have to be used.

Customizing the Locale

1. Enter the questionnaire where you want to customize the locale.
2. Select the **Locale Settings** tab.
3. Select the **Locale** you want to use from the locale selector.
4. To customize the settings, click **Customize**. A separate screen will be displayed.
5. Make your entries. Fields are validated when you exit the field. If there are any errors, please correct before continuing.
6. Click **OK** to close the screen. You will be back on the Locale Settings tab.
7. Click **Update** to save your changes. Your changes are not applied until you click Update.

Editing the Locale

While it is possible to change the locale at any time, it is recommended that the locale be selected prior to the questionnaire being published and not be changed once the questionnaire has been published.

CAUTION: *Changing locale after the questionnaire has been published may result in programs not running properly.*

EDITING QUESTIONNAIRES

You can edit any Manage Questionnaire tab at any time. Each tab can be edited in the same way.

1. Check the **Selection** box of the questionnaire where you want to work. Only one questionnaire at a time can be selected.
2. Click **Open** in the top bar menu. The screen will refresh with the Properties tab for the selected questionnaire.
3. Select the tab where you want to make changes.
4. Type in the entry that you want and click **Update**. You must click Update to save your entry.
5. A successful update will display a message box. Click **OK** to close the message and return to the screen. An unsuccessful update will display an error message. Please make any necessary changes and try again.

Changes will not be effective until a release has been generated and published.

DELETING QUESTIONNAIRES

You can delete any questionnaire at any time.

1. Check the **Selection** box of the questionnaire where you want to work. Only one questionnaire at a time can be selected.
2. Click **Delete** in the top bar menu. A Confirmation message will be displayed.
3. Click **OK** to delete the questionnaire. Click Cancel to return to the previous screen without deleting.
4. The screen will refresh and with the selected questionnaire removed.

Make sure this is the action you want to take. This action cannot be undone.

RISK OBJECTS

The Risk Objects screen is where risk objects are managed. A *Risk Object* is the insured or property that data is being collected on. Risk objects are created in product configuration. You cannot create risk objects Palette. You can manage risk object properties that are specific to Data Capture: Default Prefix, Name Format, and Icon.

There are two areas on the Risk Objects screen:

- **Risk Object Listing** - The available risk objects will be listed in a tree structure format on the left side of the screen. The risk object tree will display the relational structure of the risk objects. Each risk object will have a right click menu of options.
- **Risk Object Details** - The details area contains the details of the selected risk object.

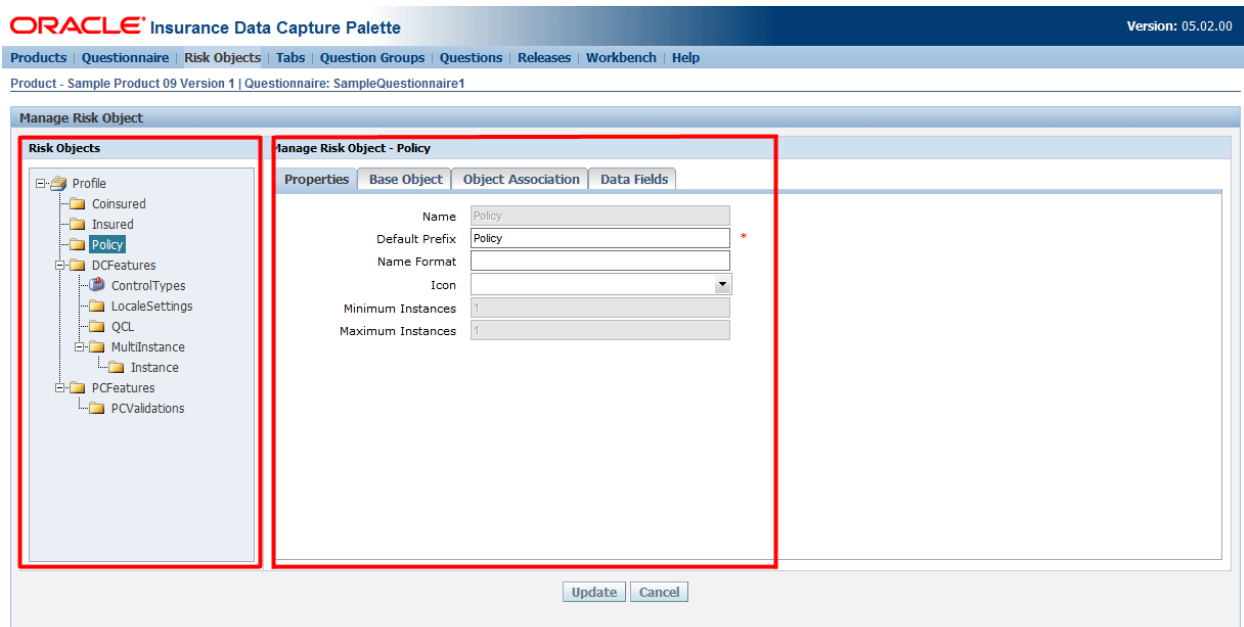


Figure 18 Risk Objects

RISK OBJECT LISTING

The risk objects available to the product will be listed on the left side of the screen. The risk object tree visually shows the relationship between the risk objects, siblings and parent/child. Risk objects displayed in the tree will be available to any questionnaire in the product.

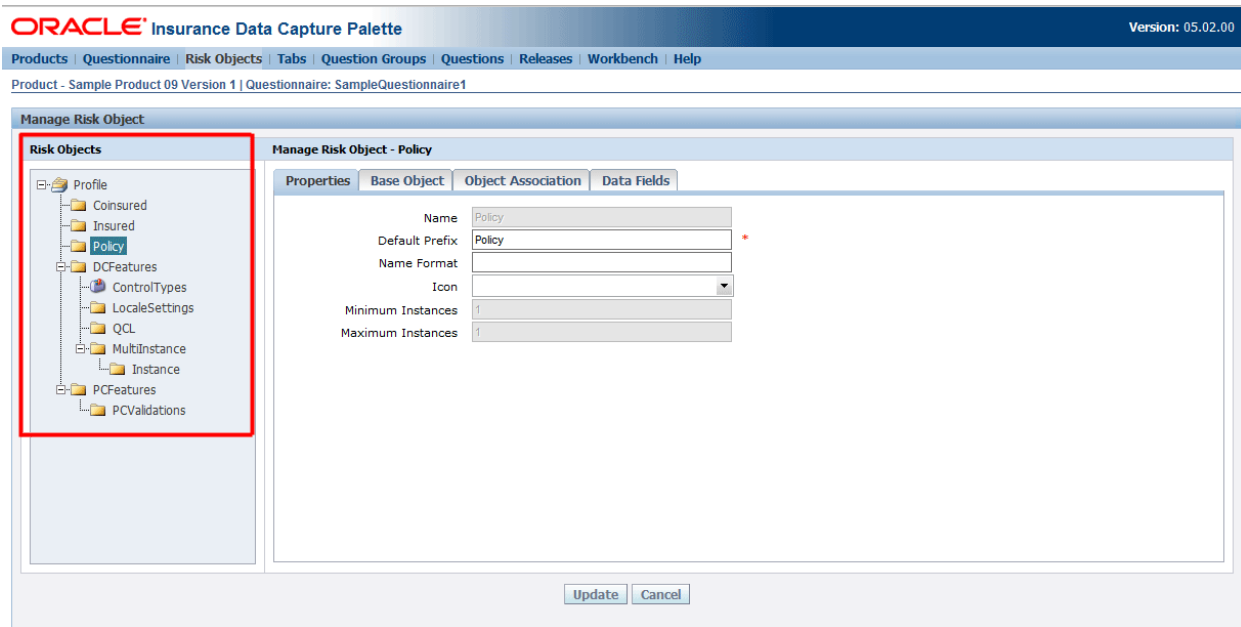


Figure 19 Risk Object Listing

FUNCTIONALITY

Limited editing of risk objects is done on the right click menu only. Every risk object has the Edit option. Only select fields can be edited in Palette. Risk object details are edited in Product Configuration.

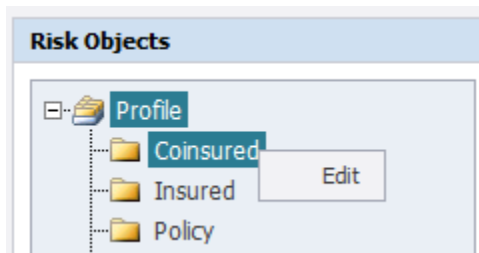


Figure 20 Risk Categories Right Click Menu

- **Edit** - Edits the selected risk object.

To view the right click menu options, select the risk object you want and right click.

RISK OBJECT DETAILS

The details area contains the details of the selected risk object.

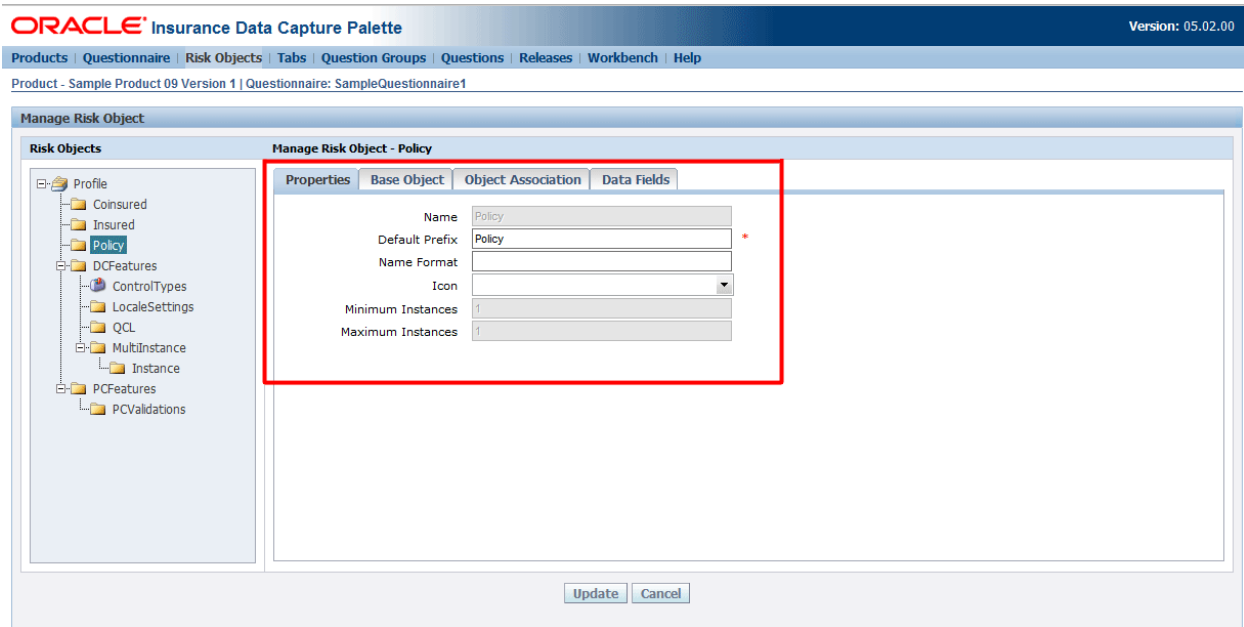


Figure 21 Risk Object Details

Risk object tabs:

- **Properties** - Lists the details of the risk object.
- **Data Fields** Displays a list of Fields that were created in this object in product configuration.

Properties

Every object will have a properties tab.

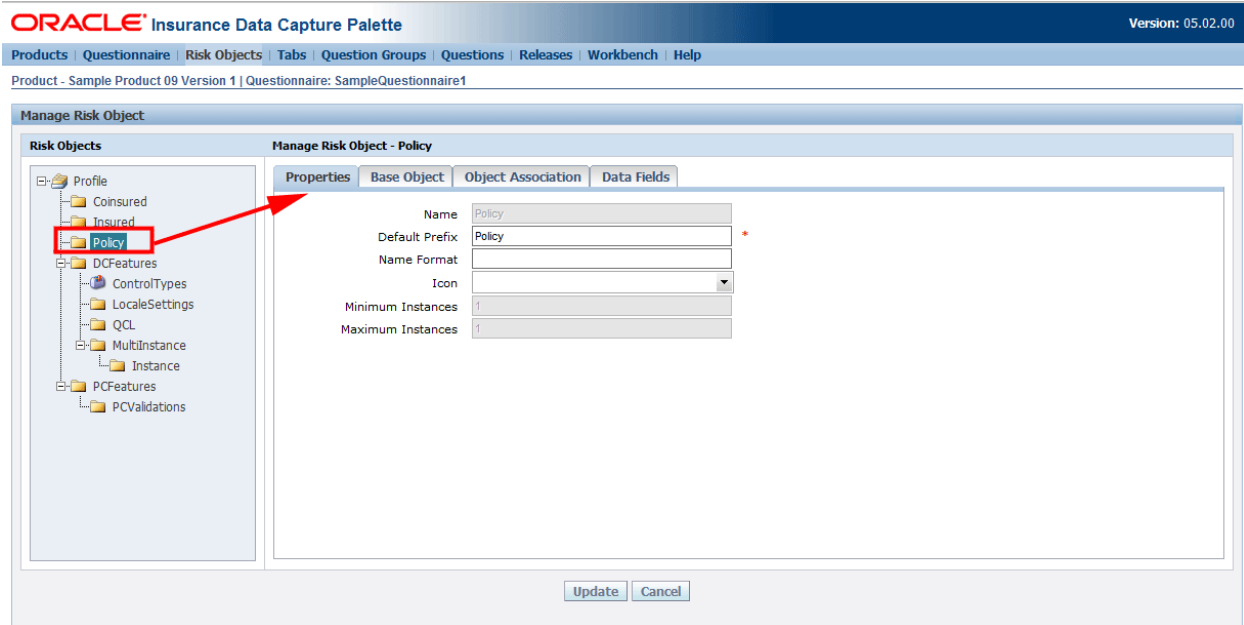


Figure 22 Risk Object Properties

- **Name** - Is the identifying element. The risk object name displays the object Custom ID created in product configuration. You cannot edit this value.
- **Default Prefix** - The identifying name used in risk object trees and question group headings in questionnaire. The field is limited to 30 alpha numeric characters. Spaces can be used as well as the special characters underscore (_) and period (.). The field is required. The default value is the object Custom ID created in product configuration
- **Name Format** - Allows for a custom defined name to be used as a label on the questionnaire. This field requires the question property Risk Object Field or Mapping ID (mId) and may be completed at a later time. If no format is entered, the default prefix will be displayed.
- **Icon** - The representative icon for the risk object. A folder is the default icon.
- **Minimum Instances** - The minimum number of instances required for this risk object is defined in product configuration (Min Occurrences) and cannot be edited in Palette.
- **Maximum Instances** - The maximum number of instances allowed for this risk object is defined in product configuration (Max Occurrences) and cannot be edited in Palette.

To Enter Properties:

1. Fields with a red asterisk (*) are required. Default Prefix is required.
2. The Default Prefix and Icon can be entered at any.
3. Click **Update** to save your entry. Risk object options will be in effect when a release is generated and published.

EDITING

Risk objects can be edited at any time. Changes to risk objects that are unique to a product will be visible in that product only.

Please be aware that changes to risk objects may affect other questionnaires in that product.

To Edit Risk Objects:

1. Select the risk object you want to edit and right click. Select **Edit**. The screen will refresh and the editable field will be open.
2. Make your changes. Options will depend upon the type of risk object selected.
3. Click **Update** to save changes.

TIP: *Items that are grayed out are not available for editing.*

TIP: *If you are unsure or this is not the action you want to take, click Cancel.*

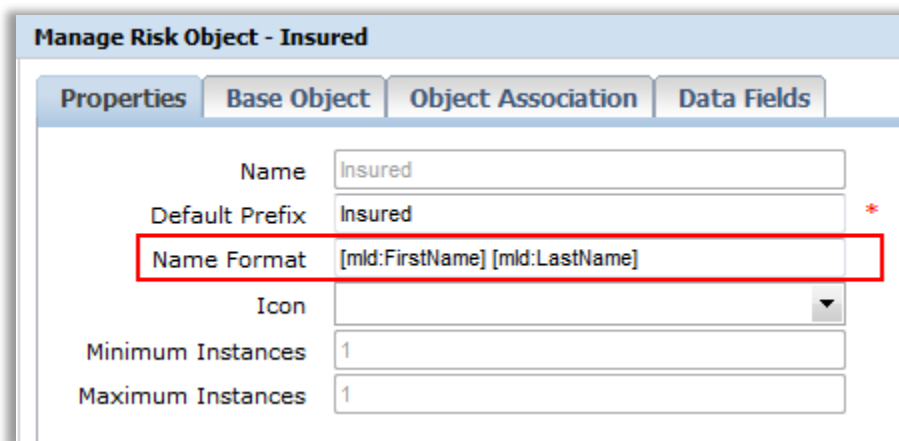
Name Formats

Name formats are used to format how risk object information is to be displayed on the questionnaire. If there is a name format entered, when a questionnaire is in process or completed, the risk object will be displayed as formatted. The name format can be entered on the Properties tab.

If you do not enter a Name Format, the risk object name will be displayed. For example, instead of the Insured's first and last name, "Insured" would be displayed.

For Example:

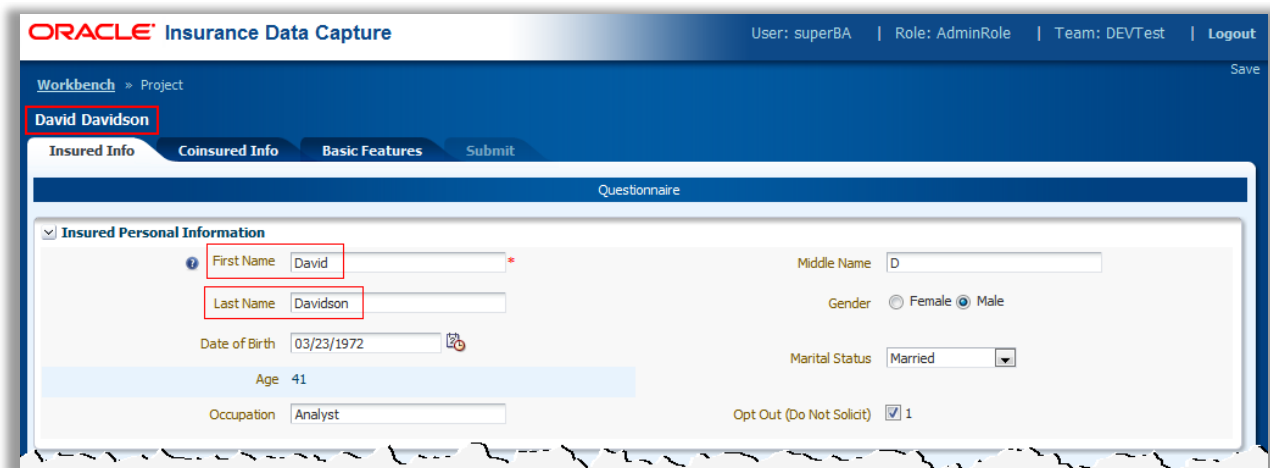
For example, if you want to format how an Insured name is displayed, you would enter a name format like: [mId:FIRST_NAME] [mId:LAST_NAME]



The screenshot shows the 'Manage Risk Object - Insured' configuration interface. It has four tabs: 'Properties', 'Base Object', 'Object Association', and 'Data Fields'. The 'Properties' tab is active. The 'Name Format' field is highlighted with a red rectangle and contains the text '[mId:FirstName] [mId:LastName]'. Other fields include 'Name' (Insured), 'Default Prefix' (Insured), 'Icon' (dropdown), 'Minimum Instances' (1), and 'Maximum Instances' (1).

Figure 23 Risk Object Properties - Name Format

This would take the values entered in the Insured's First Name and Last Name questions and place it on every instance where this risk object was being displayed in the questionnaire.



The screenshot shows the Oracle Insurance Data Capture Workbench interface. The user is logged in as 'superBA' with the role 'AdminRole' and team 'DEVTest'. The 'Workbench > Project' section shows 'David Davidson' selected. The 'Insured Info' tab is active, showing a questionnaire for 'Insured Personal Information'. The 'First Name' and 'Last Name' fields are highlighted with red boxes. The questionnaire includes fields for First Name (David), Last Name (Davidson), Middle Name (D), Gender (Male), Date of Birth (03/23/1972), Age (41), Marital Status (Married), Occupation (Analyst), and Opt Out (Do Not Solicit) (checked).

Figure 24 Name Format in Worksite

Entering a Name Format:

Name formats are created using the question property Risk Object Field. This information may not be available at the time of risk object creation. The risk object can be edited at a later time and the name format can be entered then.

The screenshot shows the Oracle Insurance Data Capture Palette interface. The title bar reads "ORACLE Insurance Data Capture Palette". Below the title bar is a navigation menu with items: Products, Questionnaire, Risk Objects, Tabs, Question Groups, Questions, Releases, Workbench, and Help. The current page is "Product - Sample Product 09 Version 1 | Questionnaire: SampleQuestionnaire1". The main content area is titled "Edit Question - FirstName" and contains several tabs: General Info, Answer Display Format, Control Properties, Behaviors, Display Condition, and Help Text. The "General Info" tab is active and displays the following fields:

ID	7229
Question Type	Simple *
Risk Object	Product09.Coinsured <input type="button" value="Select"/>
Risk Object Field	FirstName <input type="button" value="Select"/>
Data Type	String
Control Type	Single Line Text Input *
Mapping ID	<input type="text"/>
Parent Question ID	<input type="text"/>
Child Question Sequence #	<input type="text"/>
Text	First Name
Required	<input type="checkbox"/> This question requires an answer
Default Value	<input type="text"/>

At the bottom of the form are three buttons: Update, Cancel, and Delete.

Figure 25 Risk Object Field (mId) of a Question

Prior to entering a Name Format, you will need the question risk object field for the information that you want to use. The risk object field can be found on the question.

1. Open the questionnaire where you want to format names.
2. Proceed to the **Questions** tab.

3. Locate the question(s) that contains the information you want to format. For example, if you want to format the Insured and the Insured contains the first name, last name and middle initial, you would need to locate all three questions.
4. Select Edit on the question(s) to access the Risk Object Fields/Mapping IDs.

Name format must follow the pattern: [mld:xxx]

Element	Description
[– Left bracket
mld	– lower case m, capital l, lower case d
:	– Semi-colon
xxx	– where xxx is the question risk object field name (PCP Custom ID) mapping ID
]	– Right bracket

The name format must be in the exact order you want. For example: [mld:FirstName] [mld:LastName]
 With a single space between the brackets.

Punctuation can be added between the entries. Comma (,) period (.) –dash (-) and underscore (_) are allowed.

Name formats will override the values in the Default Prefix. Name formats are not required and can be added or removed at any time.

DELETING

Objects are managed in product configuration. You cannot delete risk objects in Palette.

TABS

The Tabs screen is where you manage tabs. Tabs are the pages that will be displayed for the questionnaire. Each tab contains question groups and the associated risk objects. Tabs are unique to the questionnaire where they were created

The Tabs menu option will not be visible until you select the questionnaire where you want to work.

All tabs must be created. There are no default tabs.

The screenshot shows the Oracle Insurance Data Capture Palette interface. The top navigation bar includes 'Products', 'Questionnaire', 'Risk Objects', 'Tabs' (highlighted), 'Question Groups', 'Questions', 'Releases', 'Workbench', and 'Help'. The version is 05.02.00. Below the navigation bar, the current context is 'Product - Sample Product 09 Version 1 | Questionnaire: SampleQuestionnaire1'. The main area is titled 'Manage Tabs' and contains a search bar, 'New', 'Edit', and 'Delete' buttons, and a 'Records per page: 10' dropdown. The table below lists the tabs:

Selection	Name	Title	Show Risk Object Tree	Tab Type
<input type="checkbox"/>	Submit	Submit	<input type="checkbox"/>	Data Collection
<input type="checkbox"/>	Summary	Summary	<input type="checkbox"/>	Data Collection
<input type="checkbox"/>	PCFeatures	PC Features	<input checked="" type="checkbox"/>	Data Collection
<input type="checkbox"/>	DCBasicFeatures	DC Basic Features	<input checked="" type="checkbox"/>	Data Collection
<input type="checkbox"/>	Coinsured	Coinsured Info	<input checked="" type="checkbox"/>	Data Collection
<input type="checkbox"/>	Insured	Insured Info	<input type="checkbox"/>	Data Collection

Figure 26 Tabs

On the Manage Tabs screen you can:

- Create new tabs
- View and edit existing tabs
- Delete un-used tabs
- Search for tab elements

FIELDS





When tabs are present, there are five fields:

- **Selection** - Check this box to select a tab.
- **Name** - The name of the tab.
- **Title** - The title of the page as it is displayed in the questionnaire.
- **Show Risk Object Tree** - The option to display or not display the risk tree in the questionnaire.
- **Tab Type** - The type of view in the questionnaire.

FUNCTIONALITY

All functionality is handled by selecting a tab and clicking the option from the tool bar menu. There are no right click menus.

Menu Options:

 Search	Searches Tab properties for the criteria that have been entered.
 New	Creates a new Tab.
 Edit	Edits the selected Tab.
 Delete	Deletes the selected Tab.

NEW

New Tabs can be created at any time. You will not be able to create tabs at the product level.

Creating tabs is a three step process. When you create a new tab, you will be placed on the New Tabs screen. This screen has three sections:

- **Properties** - You must define the properties of the tab before you can move to the next tab.
- **Risk Object Assignment** - You must assign the risk objects for this tab.
- **Question Group Assignment** - The last step is assigning question groups.

ORACLE Insurance Data Capture Palette Version: 05.02.00

Products | Questionnaire | Risk Objects | **Tabs** | Question Groups | Questions | Releases | Workbench | Help

Product - Sample Product 09 Version 1 | Questionnaire: SampleQuestionnaire1

New Tab

Properties | Risk Object Assignment | Question Group Assignment

Name *

Title *

Show Risk object Tree Yes No

Risk Object Tree Title

Work Area Title Bar

Copyright © 2014 Oracle Corporation. All rights reserved.

Figure 27 NewTab

The assignment sections will be visible as you complete the Properties section. You have to create properties before the risk object assignment and the question group assignment section will be accessible.

Tab Creation Preparation:

Prior to creating any tabs in Palette, you may find it helpful to have a plan on how you want the tabs to be displayed on the questionnaire in Worksite. Knowing which tab you want displayed first, second and so on will assist you when you create your tabs.

You may also find it helpful to have a plan for the elements that you want on your tabs. What questions you want to use or what information you want to gather on each tab.

The screenshot shows the Oracle Insurance Data Capture Workbench interface. At the top, the user is identified as 'superBA' with the role 'AdminRole' and team 'DEVTest'. The breadcrumb trail is 'Workbench > Project'. The main header displays the name 'David Davidson' and four tabs: 'Insured Info', 'Coinsured Info', 'Basic Features', and 'Submit'. The 'Insured Info' tab is selected, and the 'Questionnaire' section is visible. Under the 'Insured Personal Information' section, the following fields are populated: First Name (David), Last Name (Davidson), Date of Birth (03/23/1972), Age (41), Occupation (Analyst), Middle Name (D), Gender (Male), Marital Status (Married), and Opt Out (Do Not Solicit) (checked). Navigation buttons at the bottom include '<< Back', 'Next >>', and 'Submit Policy'.

Figure 28 Questionnaire in Worksite

Some items to consider:

1. The order you want to tabs to be displayed. The order that you create the tabs in will be the order the tabs are displayed in the questionnaire. Tabs cannot be re-ordered.

For example, if you know you want the Insured Information tab to be displayed first in the questionnaire, you would need to create that tab first.
2. The risk objects that you want to use on each tab. You can use single or multiple risk objects on tabs. You also can use the same risk object on multiple tabs. If you are using child risk objects, make sure that the parent risk object is also used.
3. The order you want the risk objects to be displayed on that tabs. Risk objects will be displayed in the order in which they were selected. If you select the Insured first and the Co-Insured second, then the Insured will be listed first on the tab and the Co-Insured will be next and so on. Risk objects cannot be re-ordered.
4. The question groups that you want to be displayed on each tab. Or the information you need to gather on the tab.

Step 1 - Creating a New Tab, Properties:

This is where you assign the basic properties to the tab.

1. Open the **Product** where you want to create a tab.
2. Select the **Questionnaire** where you want to create a tab. Click **Open**.
3. Select **Tabs** on the top bar menu. This will open the New Tabs screen.
4. Click **New** to open the New Tab screen.
5. Enter the **Properties** for the tab.
6. Click **Create** to go to the next screen.

Clicking Create will save your entries. If you want to stop at this point and continue later, you can.

TIP: *In order to continue, Risk Objects must be in place. If you have not created any custom risk objects that you need, you can stop here and finish at a later time.*

Properties Fields:

Tab Properties contains 5 fields. Two fields are required, Name and Title. The other fields can remain with the default values or can be completed a later time.

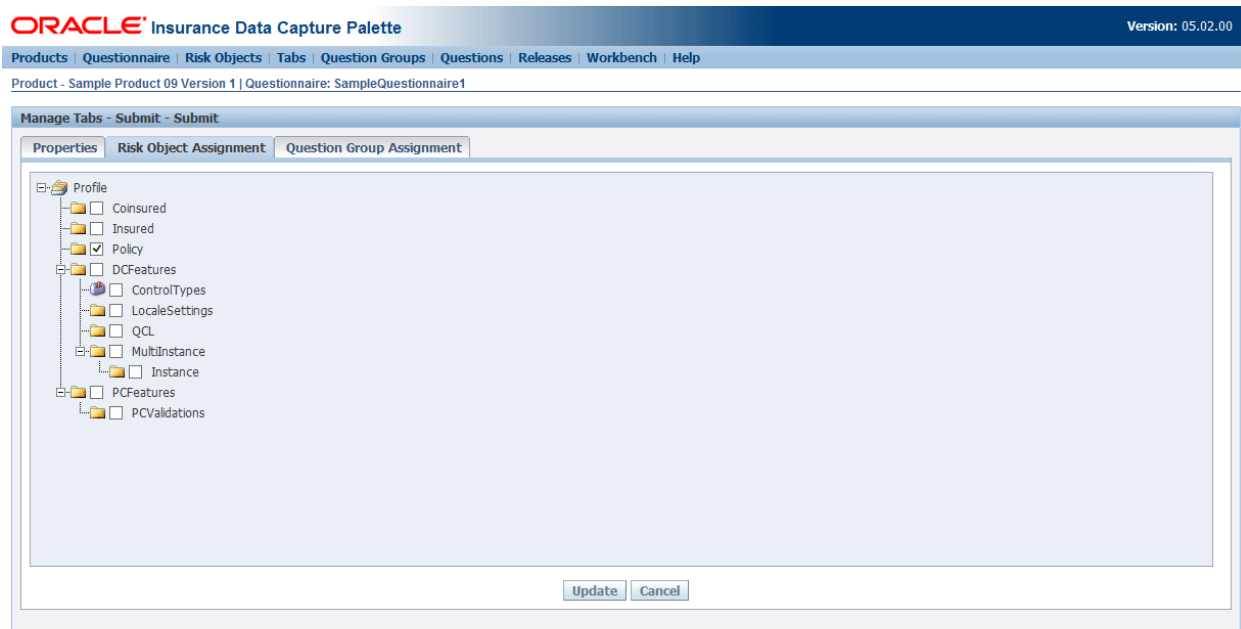
- **Name** - A unique identifier for the tab. This will be used for page navigation and not displayed on the questionnaire. The field is limited to 30 alpha numeric characters. The Name field cannot contain spaces and the only special characters allowed are underscore (_) and period (.). Names cannot be duplicated. The field is required.
- **Title** - The name of the tab as it appears in the questionnaire. This tab will be displayed as a navigation tab at the top of the questionnaire. The field is limited to 30 alpha numeric characters. Spaces can be used as well as the special characters underscore (_) and period (.). Titles can be duplicated. The field is required.
- **Show Risk Object Tree** - Select Yes to display the risk object tree on the tab. Select No to hide the risk object tree.
- **Risk Object Tree Title** - Enter the name of the risk object tree if displayed. This name will be displayed in the title bar over the risk object tree. The default is Risk Items. The field is limited to 30 alpha numeric characters. Spaces can be used as well as the special characters underscore (_) and period (.).
- **Work Area Title Bar** - Enter the title that will be displayed in the title bar at the top of the tab. The default is Questionnaire. If a risk object tree is not displayed, this will be the only element displayed. The field is limited to 30 alpha numeric characters. Spaces can be used as well as the special characters underscore (_) and period (.).

Step 2 - Creating a New Tab, Risk Object Assignment:

Next you will need to assign risk objects to the tab. The risk objects assigned will define the type of data that will be gathered on the tab. Placing a risk object on the tab makes the object available to be used on the tab. If you need more than one instance of a object on a tab, make sure you include a question that

will allow for multiple instances or return to product configuration and adjust the minimum number of instances. You can select as many risk objects as you need. Each object assigned to a tab creates a form.

Keep in mind the relationship between risk objects. For example, in Figure 28, if you are going to use, the ControlTypes risk object under DCFeatures, you need to make sure you use the DCFeatures risk object also. It does not have to be on this tab but it must be somewhere within the questionnaire. ControlTypes is related to DCFeatures and must be used in that context.



Copyright © 2014 Oracle Corporation. All rights reserved.

Figure 29 Assigning Risk Objects

Risk Object Order:

To specify an order, select the risk object that you want to be first and click Update. This will assure that the risk object you have selected will be first. Repeat the select and Update process for the remaining risk objects.

To Select a Risk Object:

1. Check the box in front of the risk object that you want to make available to the tab.
2. Click **Update** to go to the next screen.

Clicking Update will save your entries. If you want to stop at this point and continue later, you can.

TIP: In order to continue, Question Groups must be in place. If you have not created any questions groups, you will not be able to assign questions.

Step 3 - Creating a New Tab, Question Group Assignment:

The last step is to assign question groups. Assigning Question Groups to Tabs defines the specific data that will be gathered on that Tab.

There are three areas where you can view information or perform an action:

- Risk Objects (Forms)
- Question Group Assignment - Unassigned
- Question Group Assignment - Assigned

You also can search the question groups.

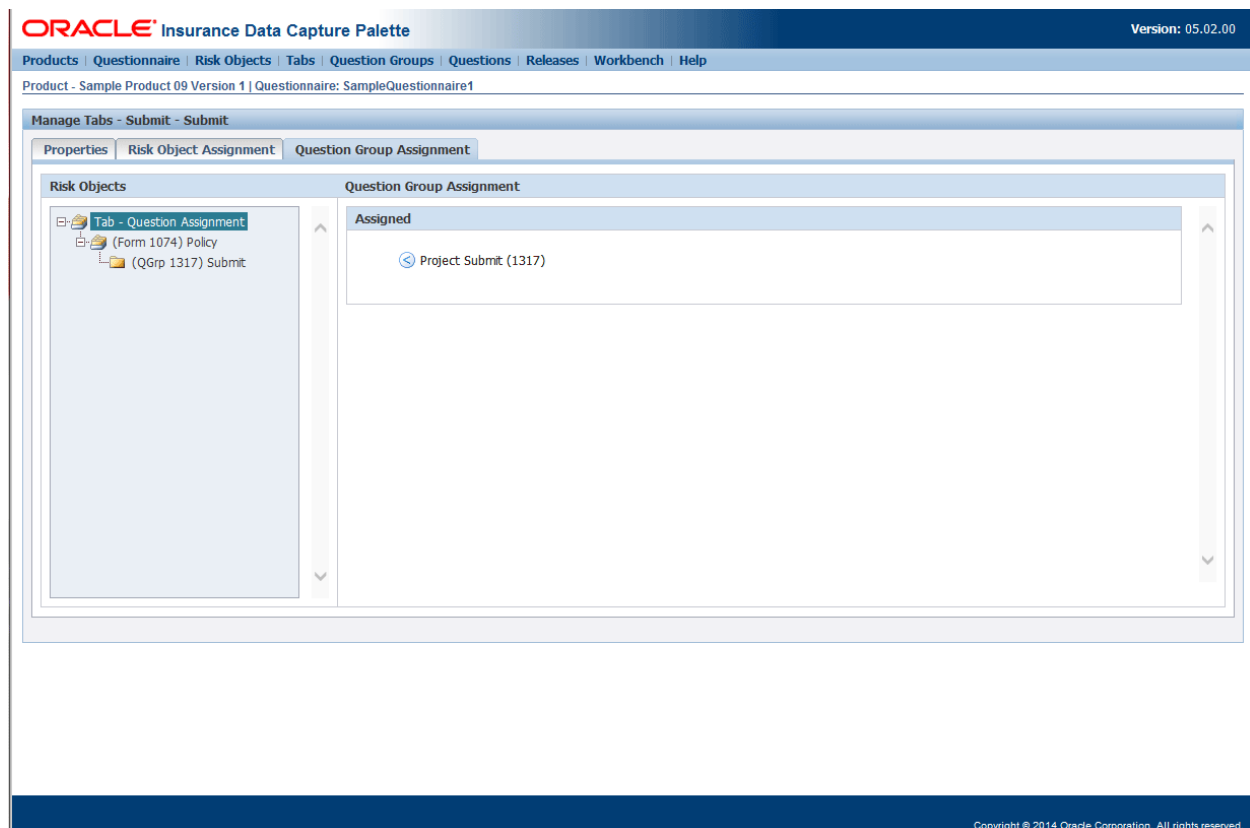





Figure 30 Assigning Question Groups

There are three icons in the Question Group Assignment area:

	Select - moves the selected question group to the assigned question group area.
	Remove - removes the selected question group from the assigned question group area.
 Search	Searches the available question groups for the criteria that have been entered.

Selecting the Risk Objects:

The Risk Objects area displays the list of risk objects (forms) currently assigned to the tab. This is an information only area. No changes can be made here.

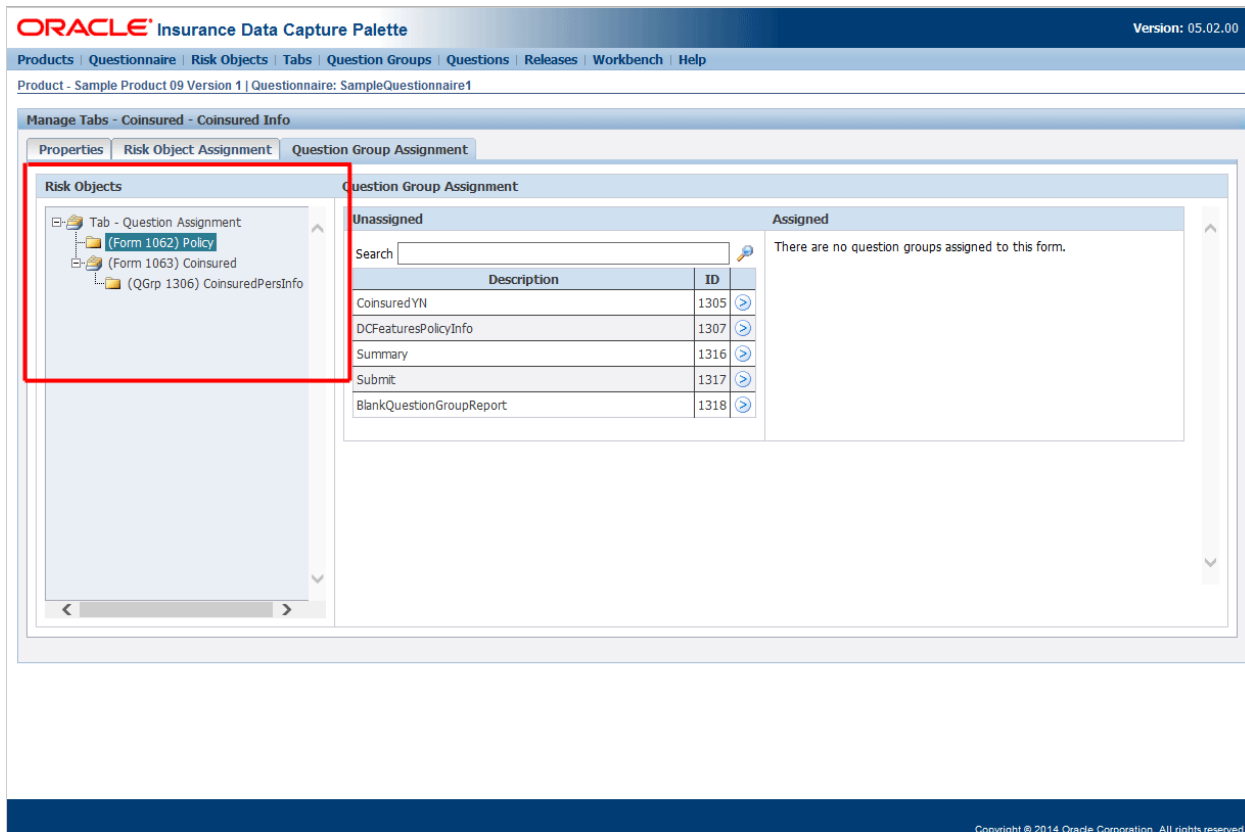


Figure 31 Question Group Assignment Tab - Risk Selection

The risk objects area will display the assigned risk objects and the assigned question groups underneath. A form is the association of a risk object to a tab. In front of each risk object, is a Form ID number (Form nn), where nn equals the unique numeric identifier of the form (risk object and tab association).

In front of each question group assigned to the risk object is a question group ID number (QGrp nn), where nn equals the ID number of the question group.

Selecting Question Group Assignment - Unassigned:

The Question Group Assignment - Unassigned area lists all the available question groups that have not been assigned to the currently selected risk object. Once a question group has been assigned, it will be moved from unassigned to assigned. You cannot repeat a question group.

The Question Group Assignment Unassigned area lists all the Question Groups available to this questionnaire risk object that have not been assigned to the currently selected form.

If there are no question groups listed, you must go to the Question Groups screen and create them.

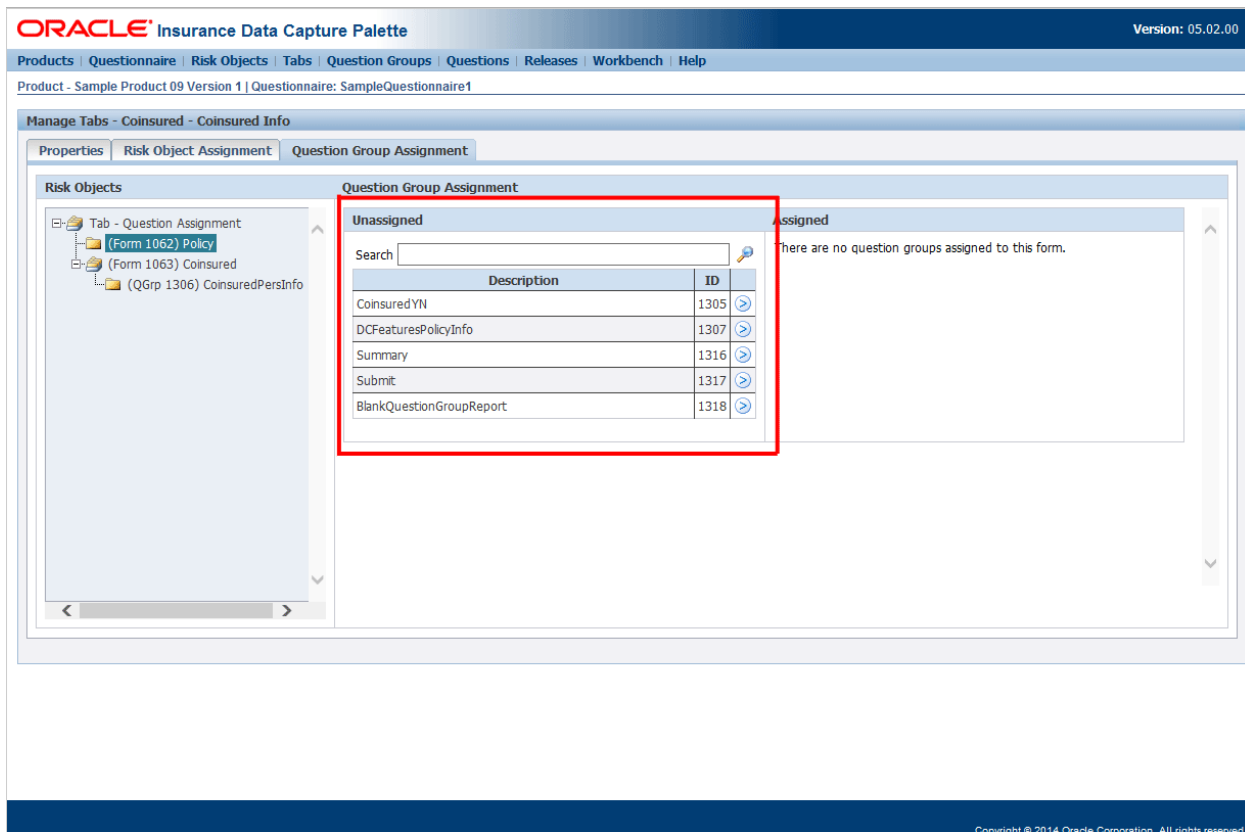


Figure 32 Question Group Assignment Tab - Question Group Assignment

To Assign a Question Group:

1. Select the **form** you want to use. You must select the form (risk object) where you want the question groups to be placed.
2. Select the **question groups** you want for the risk. Click the **Select** icon at the end of the row. The question group will move over into the assigned question group area. Question groups are saved when you select.

Question Group Assignment - Assigned:

The Assigned question group area contains the question groups that have been selected for the risk object. In this area you can - Unassign Question Group(s).

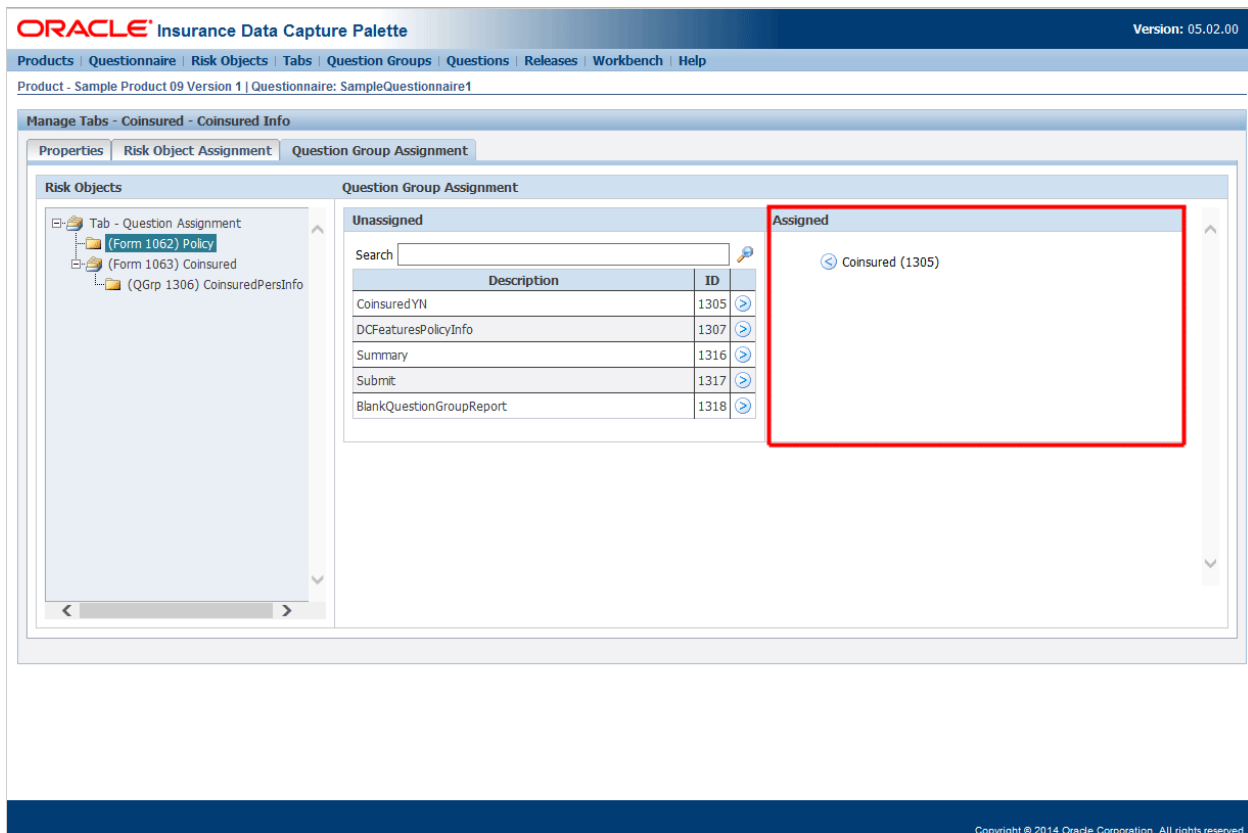


Figure 33 Question Group Assignment Tab - Assigned Question Groups

To Unassign a Question Group:

1. Select the **question groups** you want to unassign.
2. Click the **Remove** icon at the end of the row. The question group will move over into the unassigned question group area. Question groups are saved when you select.

Searching

At the top of the unassigned area is a search option. This allows you to Search for question groups by description or ID. Searching can be done at any time and does effect the question groups you have already selected.

Searches are done against question group descriptions and IDs. The results returned will be the question groups that meet the search criteria that are not assigned to the risk. You will be able to assign a question group to the risk object from a search. You can search against the entire tab. This will return every question group that meets the search criteria; however you will not be able to assign a question group to a risk object. Question groups can only be assigned if a risk object has been selected.

To clear the field, clear the search field and search against a blank field. This will return all available question groups.

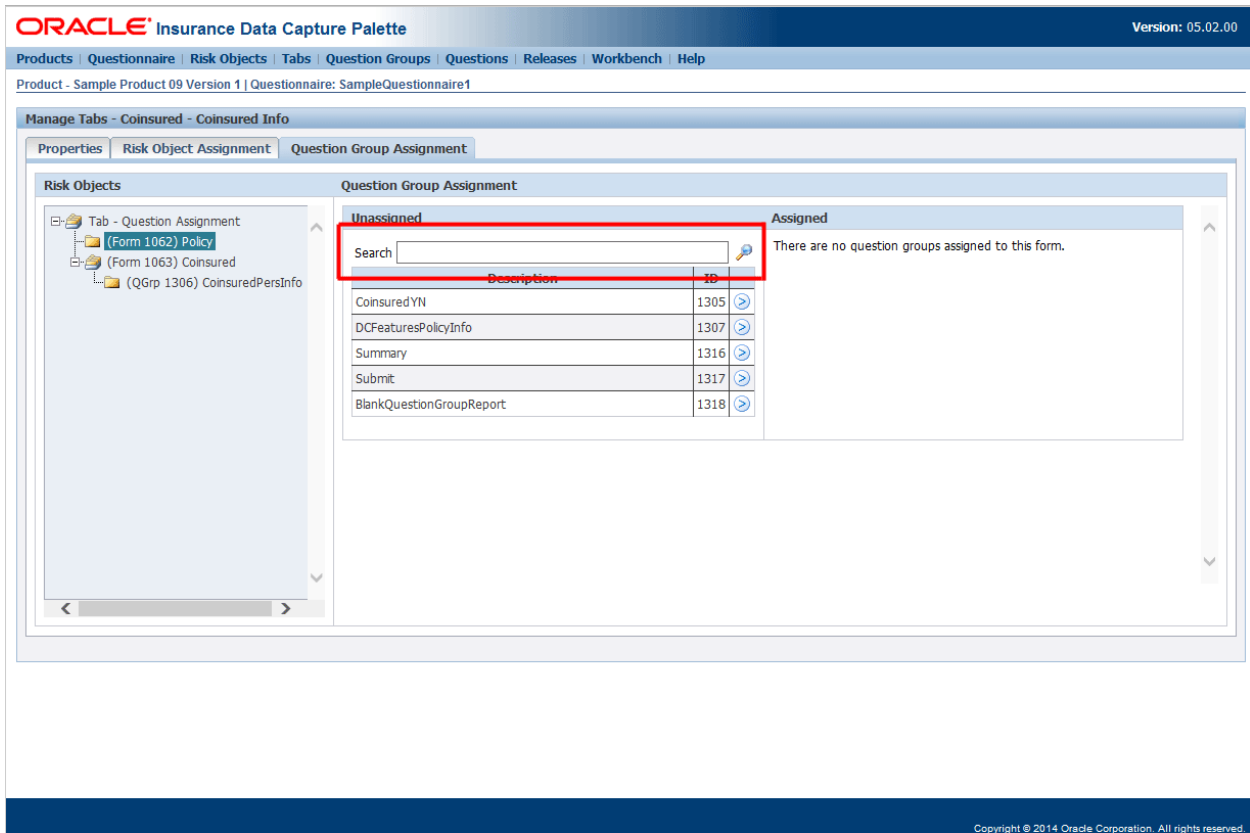


Figure 34 Search Unassigned Question Groups

EDITING

You can edit any tab at any time. Risk Objects and Question Groups can be added or removed. Tabs will not reflect any changes in Worksite until the release has been published.

If you want to remove a risk object you will need to unassign the question groups from the risk objects. Risk objects cannot be removed until all associated question groups have been unassigned.

ORACLE Insurance Data Capture Palette Version: 05.02.00

Products | Questionnaire | Risk Objects | **Tabs** | Question Groups | Questions | Releases | Workbench | Help

Product - Sample Product 09 Version 1 | Questionnaire: SampleQuestionnaire1

Manage Tabs

Search + New **Edit** Delete Records per page: 10

Selection	Name	Title	Show Risk Object Tree	Tab Type
<input type="checkbox"/>	Submit	Submit	<input type="checkbox"/>	Data Collection
<input type="checkbox"/>	Summary	Summary	<input type="checkbox"/>	Data Collection
<input type="checkbox"/>	PCFeatures	PC Features	<input checked="" type="checkbox"/>	Data Collection
<input type="checkbox"/>	DCBasicFeatures	DC Basic Features	<input checked="" type="checkbox"/>	Data Collection
<input checked="" type="checkbox"/>	Coinsured	Coinsured Info	<input checked="" type="checkbox"/>	Data Collection
<input type="checkbox"/>	Insured	Insured Info	<input type="checkbox"/>	Data Collection

Copyright © 2014 Oracle Corporation. All rights reserved.

Figure 35 Editing a Tab

To Edit:

1. Open the **Product** where you want to edit a tab.
2. Select the **Questionnaire** where you want to edit a tab. Click **Open**.
3. Select **Tabs** on the top bar menu. This will open the Manage Tabs screen.
4. Check the **selection box** in front of the tab you want to edit.
5. Click **Edit**. This will open the Properties tab where you can make any edits to the tab.

DELETING

You can delete any tab at any time. Tabs that are in use can be deleted. You do not have to clear risk objects or questions groups. The tab will not be removed from Worksite until the release has been published.

Please make sure this is the action you want to take. Deletes are permanent.

To Delete:

1. Open the **Product** where you want to delete a tab.
2. Select the **Questionnaire** where you want to delete a tab. Click **Open**.
3. Select **Tabs** on the top bar menu. This will open the Manage Tabs screen.
4. Check the selection box in front of the tab you want to edit.
5. Click **Delete**. A Confirmation message will be displayed.

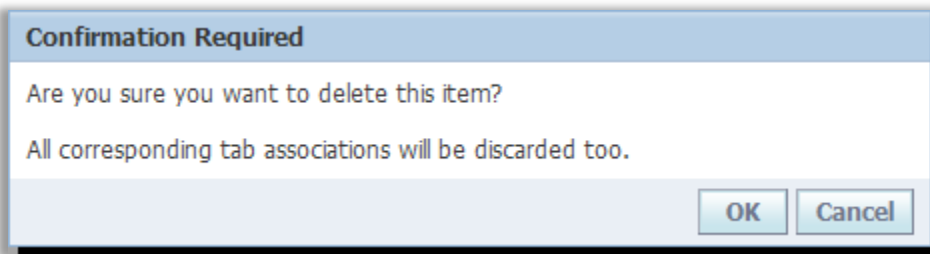


Figure 36 Delete Confirmation Message

6. Click **OK** to delete the tab. The screen will refresh and your tab will no longer be listed.

TIP: If you are unsure or this is not the action you want to take, click **Cancel**.

WORKING WITH A TAB IN A QUESTIONNAIRE

Once a tab is created, it will be available on a questionnaire after a release has been created and published. Tabs will be listed on the questionnaire in creation order. The first tab created will be first, the second tab will be next and so on.

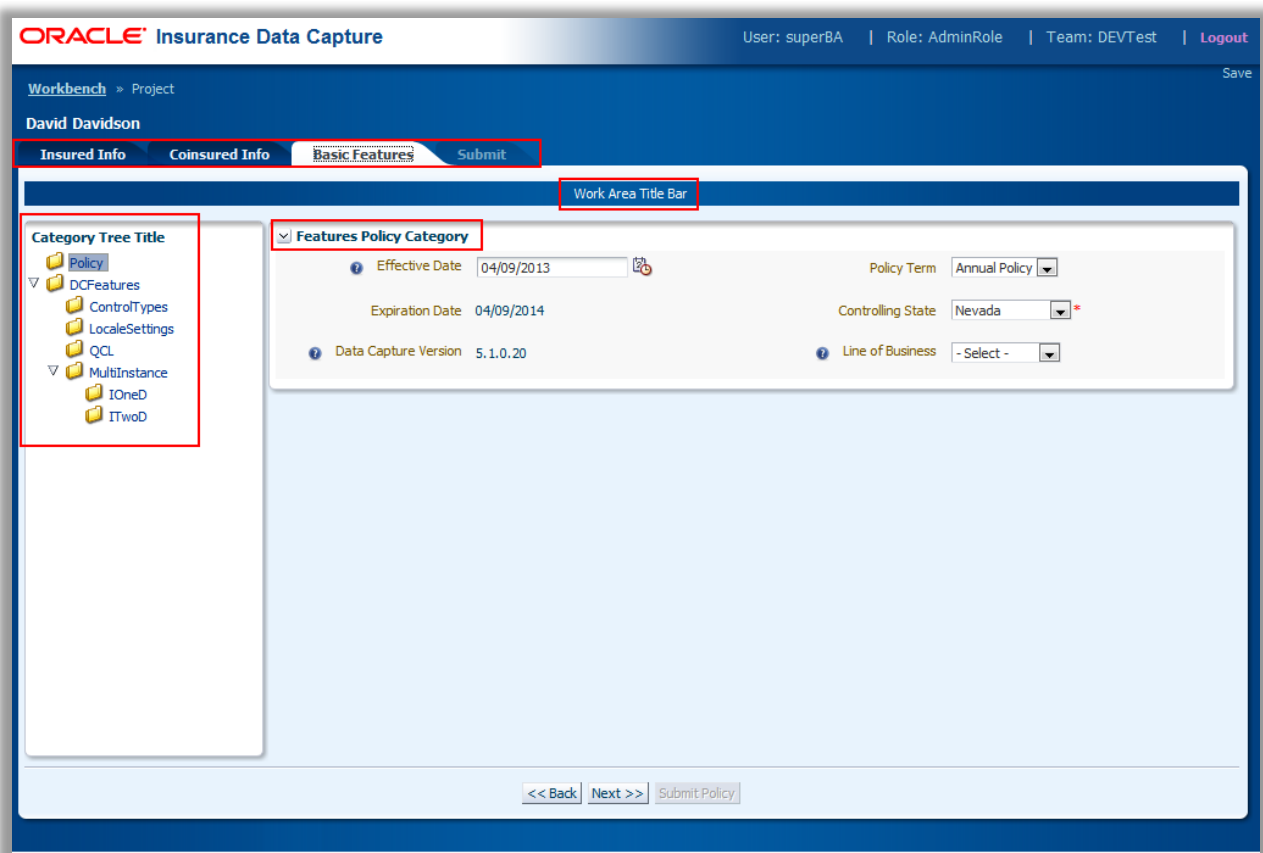


Figure 37 Tabs in Worksite

The tabs you have created will be listed across the top of the page.

On each tab will be the risk objects and the associated question groups that have been selected for the risk object.

QUESTION GROUPS

The Manage Question Groups screen is where you manage question groups. A Question Group is a collection of one or more related questions. You can group questions in any way that you choose with as many or as few questions as you want. For example, you could create a single question group for Insured that held Name, Date of Birth, and Occupation. Or you could create two question groups for Insured, one for Name and Date of Birth and one for Employment Information.

Question Groups are tied to a specific product and risk object.

The Question Group menu option will be visible when a selected product is open. Question groups can be created in the product or questionnaire. You can create question groups while working in a specific questionnaire however; question groups are not unique to the questionnaire.

There are no default question groups. All question groups must be created.

ORACLE Insurance Data Capture Palette Version: 05.02.00

Products | Questionnaire | Risk Objects | Tabs | **Question Groups** | Questions | Releases | Workbench | Help

Product - Sample Product 09 Version 1 | Questionnaire: SampleQuestionnaire1

Manage Question Groups

[Add New Group](#)

Search Records per page: 25

Edit	Assign	ID	Risk Object	Name	Display Text
		1304	Product09.Insured	InsuredPersInfo	Insured Personal Information
		1305	Product09.Policy	CoinsuredYN	Coinsured
		1306	Product09.Coinsured	CoinsuredPersInfo	Coinsured Personal Information
		1307	Product09.Policy	DCFeaturesPolicyInfo	DC Features Policy Information
		1308	Product09.DCFeatures	DataCaptureFeatures	Data Capture Features
		1309	Product09.DCFeatures.ControlTypes	ControlTypes	Control Types
		1310	Product09.DCFeatures.LocaleSettings	LocaleSettings	Locale Settings
		1311	Product09.DCFeatures.QCL	QCL	Question Condition Language (QCL)
		1312	Product09.DCFeatures.MultiInstance	MultiInstance	Multi-Instance Table
		1313	Product09.DCFeatures.MultiInstance.Instance	Instance	Category Instance Information
		1314	Product09.PCFeatures	PCFeatures	Product Configuration Features
		1315	Product09.PCFeatures.PCValidations	PCValidations	Product Configuration Validations
		1316	Product09.Policy	Summary	Summary Information
		1317	Product09.Policy	Submit	Project Submit
		1318	Product09.Policy	BlankQuestionGroupReport	Blank Question Group Report

Copyright © 2014 Oracle Corporation. All rights reserved.

Figure 38 Question Groups Main

On the Manage Question Groups screen you can:

- Create new question groups
- View and edit existing question groups

- Assign questions to a question group
- Search for question group elements

Fields





When question groups are present, there will be six fields for each question group:

- **Edit** - Select the edit icon when you want to edit the question group. Editing a question group includes deleting question groups.
- **Assign** - Select the assign icon when you want to assign questions to the question group.
- **ID** - This is a system generated ID number. This is an information only field and cannot be changed.
- **Risk Object** - The product and object where this question group was created. Question groups will be displayed for the selected product.
- **Name** - The name of the question group. The name does not have to be unique.
- **Display Text** - The text that is displayed in a questionnaire for this question group.

FUNCTIONALITY

All functionality is handled by selecting an icon for the question group or clicking the Add New Group option at the top of the screen. There are no right click menus.

Menu Options:

 Search	Searches question group properties for the criteria that have been entered.
 Add New Group	Creates a new question group.
	Opens the question group for editing.
	Opens the question group to where you can assign questions.

NEW

New question groups can be created at any time in either the product or questionnaire. For example, if you create a question group called Drivers in the Auto product, then only questionnaires created in the Auto product will be able to use this question group. A questionnaire created in the Home product will not have this question group available.

Question Group Preparation:

Prior to creating questions groups, you should have an idea of the types of questions you want to group together and at what level.

Question Groups allow multiple questions to be grouped by a common element, such as a risk object. What common element would you like to group your questions by?

The screenshot displays the Oracle Insurance Data Capture Workbench interface. At the top, the user is identified as 'superBA' with the role 'AdminRole' and team 'DEVTest'. The breadcrumb trail shows 'Workbench > Project'. The main header identifies the user as 'David Davidson' and lists navigation tabs: 'Insured Info', 'Coinsured Info', 'Basic Features', and 'Submit'. The 'Insured Info' tab is active, and a 'Questionnaire' section is expanded to show 'Insured Personal Information'. This section contains the following fields:

- First Name: David
- Last Name: Davidson
- Date of Birth: 03/23/1972
- Age: 41
- Occupation: Analyst
- Middle Name: D
- Gender: Male (selected)
- Marital Status: Married
- Opt Out (Do Not Solicit): 1 (checked)

At the bottom of the form, there are navigation buttons: '<< Back', 'Next >>', and 'Submit Policy'.

Figure 39 Questionnaire in Worksite

When considering your question groups, keep in mind the risk objects that you have created or may need to create. For example, if you know that you want Driver, Vehicle and Claims question groups then you must create these objects in product configuration prior to creating the Question Group.

To Create a New Question Group:

There are two steps to creating a question group:

- **Step 1:** Defining the properties of the group, Name, Risk Object, Columns and Display Text
- **Step 2:** Assigning questions to the groups

You will not be able to assign questions until you define the properties of the question group.

The screenshot shows the 'Add New Question Group' form in the Oracle Insurance Data Capture Palette. The form is titled 'Add New Question Group' and is located within a navigation pane that includes 'Products', 'Questionnaire', 'Risk Objects', 'Tabs', 'Question Groups', 'Questions', 'Releases', 'Workbench', and 'Help'. The current context is 'Product - Sample Product 09 Version 1 | Questionnaire: SampleQuestionnaire1'. The form fields are: ID (text input with '[new]' value), Name (text input), Risk Object (text input with a 'Select' button), Columns (dropdown menu with 'Questionnaire Default' selected), and Display Text (text area). At the bottom of the form are four buttons: 'Create', 'Cancel', 'Delete', and 'Assign Questions'.

Copyright © 2014 Oracle Corporation. All rights reserved.

Figure 40 Creating a New Question Group

Step 1: Defining the Properties

1. Open the **product** where you want to create a question group.
2. Select the **questionnaire** where you want to work.
3. Select **Question Groups** on the top bar menu. This opens the Manage Question Group screen.
4. Click **Add New Group** to open the Add New Question Group screen.
5. Enter the **Properties** for the question group.
6. Click **Create**. A message will be displayed. If you are successful, click **OK**. If there is an error, please correct the error to continue.

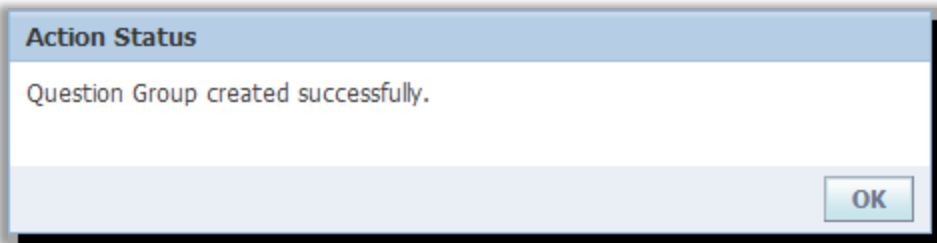


Figure 41 Creating New Question Group Success Message

Clicking Create will save your entries and allow you to continue. If you want to stop at this point and continue later, you can by clicking Cancel to leave the screen.

Fields:

The Add New Question Group screen has 3 fields. Two fields are required, Name and Display Text. The ID field is a default system identification number and cannot be edited.

- **ID** – A system identification number that cannot be edited.
- **Name** – A unique identifier for the question group. This will be used for page navigation and not displayed on the questionnaire. The field is limited to 30 alpha numeric characters. The Name field cannot contain spaces and the only special characters allowed are underscore (_) and period (.). Names cannot be duplicated. The field is required.
- **Risk Object** – The risk object associated with this question group. The field is required.
- **Columns** – The number of columns to be used by the question group. The default is to use the column setting of the questionnaire. An entry in this field overrides the questionnaire setting for this question group only.
- **Display Text** – The name of the question group as it appears in the questionnaire. The Display Text is the title of the question group in the questionnaire. The field is limited to 30 alpha numeric characters. Spaces can be used as can the special characters underscore (_) and period (.). Display Text can be duplicated. The field is required.

Step 2: Assigning Questions to the Question Group

Questions can be assigned at the time you create the question group or at a later date.

Assign Questions to Question Group:

When you create a new question group, the screen will refresh and the Assign Questions option will now be available.

1. Click **Assign Questions**. The Assign Questions to Question Group screen will be displayed.

The Assign Questions to Question Group screen lists. Unassigned questions will be located on the left hand side and the questions that have been assigned to the question group will be on the right.

The screenshot shows the 'Manage Question Group - Insured Personal Information' interface. It includes a header with the Oracle logo and 'Insurance Data Capture Palette' text, and a version number '05.02.00'. A navigation bar contains links for Products, Questionnaire, Risk Objects, Tabs, Question Groups, Questions, Releases, Workbench, and Help. Below this, the current context is 'Product - Sample Product 09 Version 1 | Questionnaire: SampleQuestionnaire1'. The main form area contains several fields: ID (1304), Name (InsuredPersInfo), Risk Object (Product09.Insured with a 'Select' button), Columns (Questionnaire Default dropdown), and Display Text (Insured Personal Information). At the bottom of the form, there are four buttons: Update, Cancel, Delete, and Assign Questions. The Assign Questions button is highlighted with a red rectangular box.

Copyright © 2014 Oracle Corporation. All rights reserved.

Figure 42 Assigning Questions

2. Select the **questions** you want for the question group and click the **Select** icon at the end of the row. The question will move over into the assigned area.
3. When you have selected all the questions you want in the question group, click **Done**. Your selections will be saved and you will be returned to the Assign Questions to Question Group screen.

- If necessary, you can make updates to the Name of Display Text. If you are finished with the question group, click **Cancel** to return to the Manage Question Group screen.

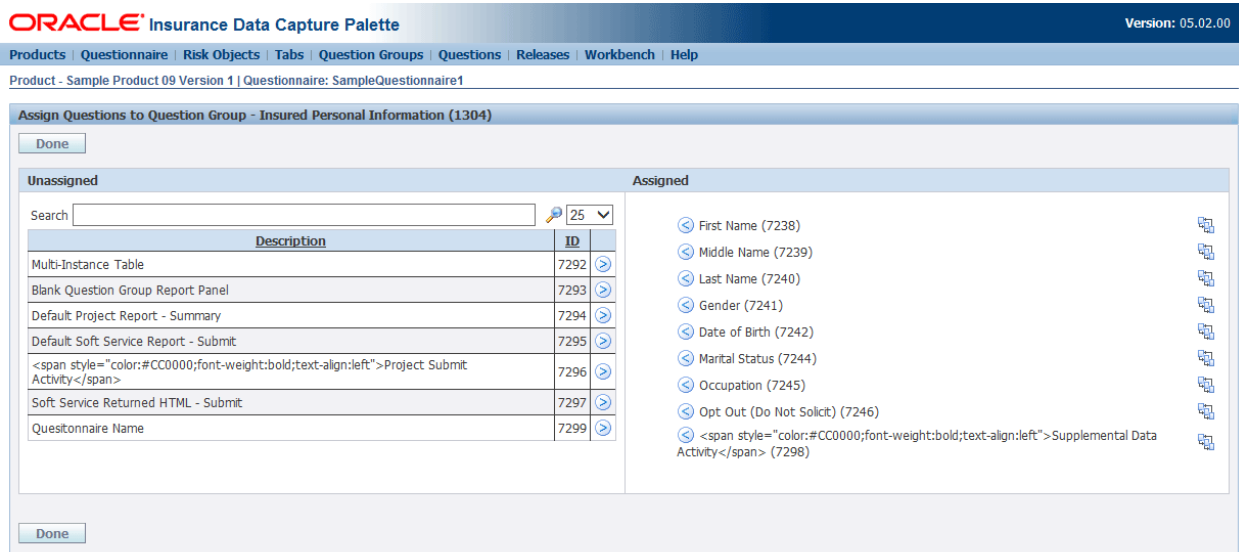






Figure 43 Assigning Questions to the Question Group

There are four icons in the Assign Questions to Question Group area:

	Select - moves the selected question to the assigned question area.
	Remove - removes the selected question from the assigned question area.
	Order - allows you to drop and drag the question to the position you want.
	Search - Searches the available questions for the criteria that have been entered.

You can change the number of questions displayed on the screen using the options displayed element found in the search area. You can page through the questions using the page links at the bottom of the screen. To reduce the number of questions displayed, Enter search criteria.

To Reorder Questions:

Reordering questions will allow you to place the question you want to ask first at the top of the questionnaire. Do you want to present some knock-out questions up front to make sure that the risk is something that your company covers? For example, if you are creating an insurance application and your

company covers personal auto, you will want to make sure that the risk is clearly a personal auto risk and not a commercial auto risk. If your company defines a personal auto risk as 9 vehicles or less, you may want to ask if the coverage is for less than 10 vehicles as one of the first things. This way you can be sure that you are completely the correct questionnaire.

1. Select the **question** you want to move up or down.
2. Click the **Reorder** icon at the end of the row. A box will be placed around the question.
3. Drag the question to the position you want and drop it there. The order is saved when you drop the question.

To Unassign a Question:

1. Select the **question** you want to unassign.
2. Click the **Remove** icon at the end of the row. The question will move over into the unassigned question area. Questions are saved when you select.

You also can assign questions from the Manage Question Group screen.

Assign Questions to an Existing Question Group:

Questions can be assigned at any time after the Question Group has been created. Click the Assign icon on the Question Group where you want to assign questions.

This opens the question group to the Assign Questions to Question Group screen.

The screenshot shows the 'Manage Question Groups' interface. At the top, there's a navigation bar with 'Products', 'Questionnaire', 'Risk Objects', 'Tabs', 'Question Groups', 'Questions', 'Releases', 'Workbench', and 'Help'. Below that, the current context is 'Product - Sample Product 09 Version 1 | Questionnaire: SampleQuestionnaire1'. The main area is titled 'Manage Question Groups' and includes an 'Add New Group' button and a search bar. A table lists various question groups with columns for 'Edit', 'Assign', 'ID', 'Risk Object', 'Name', and 'Display Text'. The 'Assign' column for each row is highlighted with a red box. The table contains 15 rows of data.

Edit	Assign	ID	Risk Object	Name	Display Text
		1304	Product09.Insured	InsuredPersInfo	Insured Personal Information
		1305	Product09.Policy	CoinsuredYN	Coinsured
		1306	Product09.Coinsured	CoinsuredPersInfo	Coinsured Personal Information
		1307	Product09.Policy	DCFeaturesPolicyInfo	DC Features Policy Information
		1308	Product09.DCFeatures	DataCaptureFeatures	Data Capture Features
		1309	Product09.DCFeatures.ControlTypes	ControlTypes	Control Types
		1310	Product09.DCFeatures.LocaleSettings	LocaleSettings	Locale Settings
		1311	Product09.DCFeatures.QCL	QCL	Question Condition Language (QCL)
		1312	Product09.DCFeatures.MultiInstance	MultiInstance	Multi-Instance Table
		1313	Product09.DCFeatures.MultiInstance.Instance	Instance	Category Instance Information
		1314	Product09.PCFeatures	PCFeatures	Product Configuration Features
		1315	Product09.PCFeatures.PCValidations	PCValidations	Product Configuration Validations
		1316	Product09.Policy	Summary	Summary Information
		1317	Product09.Policy	Submit	Project Submit
		1318	Product09.Policy	BlankQuestionGroupReport	Blank Question Group Report

Records per page: 25

Copyright © 2014 Oracle Corporation. All rights reserved.

Figure 44 Assigning Questions to a Question Group

Any question in the same product and risk object can be used in any question group. This does not prevent the same question from being used by another question group. The same question can be used in other Question Groups on multiple tabs in multiple questionnaires.

TIP: Do not assign the same question to the same object on a tab. This may cause errors. For example, if you had a Name question assigned to the Insured in group1, then you should not assign the Name question to the Insured in group2 on the same tab.

Searching

Searching can be done on Manage Question Groups main screen or on the Assign Questions to Question Group screen.

Searches on the Assign Questions to Question Group screen are done against question descriptions and IDs. The results returned will be the questions that meet the search criteria that are not assigned to the question group. You will be able to assign a question to a question group from a search.

The search field is at the top of the unassigned area. Searching can be done at any time and does effect the questions you have already selected.

Searches on the Manage Question Groups main screen are done on any element listed on the screen. The results returned will be every question group that meets the search criteria. You will be able to edit or assign questions from the results returned.

The search field is located at the top of the screen. Searching can be done at any time and does not affect the question groups already created.

To Search:

In the Assign Questions to Question Group screen, Enter your search criteria. Click the search icon at the end of the field. Results will be displayed in the unassigned field.

In the Manage Question Group screen, enter your search criteria and click the search icon at the end of the field. Results will be displayed in the main body of the screen.

To clear the field, clear the search field and search against a blank field. This will return all available question groups.

EDITING

Any question group can be edited at any time. Edits will not be reflected in Worksite until the release has been published.

System generated ID number is not available for editing.

ORACLE Insurance Data Capture Palette Version: 05.02.00

Products | Questionnaire | Risk Objects | Tabs | Question Groups | Questions | Releases | Workbench | Help

Product - Sample Product 09 Version 1 | Questionnaire: SampleQuestionnaire1

Manage Question Groups

[Add New Group](#)

Search Records per page: 25

Edit	Assign	ID	Risk Object	Name	Display Text
		1304	Product09.Insured	InsuredPersInfo	Insured Personal Information
		1305	Product09.Policy	CoinsuredYN	Coinsured
		1306	Product09.Coinsured	CoinsuredPersInfo	Coinsured Personal Information
		1307	Product09.Policy	DCFeaturesPolicyInfo	DC Features Policy Information
		1308	Product09.DCFeatures	DataCaptureFeatures	Data Capture Features
		1309	Product09.DCFeatures.ControlTypes	ControlTypes	Control Types
		1310	Product09.DCFeatures.LocaleSettings	LocaleSettings	Locale Settings
		1311	Product09.DCFeatures.QCL	QCL	Question Condition Language (QCL)
		1312	Product09.DCFeatures.MultiInstance	MultiInstance	Multi-Instance Table
		1313	Product09.DCFeatures.MultiInstance.Instance	Instance	Category Instance Information
		1314	Product09.PCFeatures	PCFeatures	Product Configuration Features
		1315	Product09.PCFeatures.PCValidations	PCValidations	Product Configuration Validations
		1316	Product09.Policy	Summary	Summary Information
		1317	Product09.Policy	Submit	Project Submit
		1318	Product09.Policy	BlankQuestionGroupReport	Blank Question Group Report

Copyright © 2014 Oracle Corporation. All rights reserved.

Figure 45 Editing a Question Group

To Edit:

1. Open the **product** where you want to edit a question group.
2. Select the **questionnaire** where you want to work. Click **Open**.
3. Select **Question Groups** on the top bar menu. This opens the Manage Question Groups screen.
4. Click the **edit icon** in front of the question group you want to edit. This opens the Question Group screen where you can make any edits to the question group.

ORACLE Insurance Data Capture Palette Version: 05.02.00

Products | Questionnaire | Risk Objects | Tabs | Question Groups | Questions | Releases | Workbench | Help

Product - Sample Product 09 Version 1 | Questionnaire: SampleQuestionnaire1

Manage Question Group - Insured Personal Information

ID	1304
Name	<input type="text" value="InsuredPersInfo"/>
Risk Object	<input type="text" value="Product09.Insured"/> <input type="button" value="Select"/>
Columns	<input type="text" value="Questionnaire Default"/>
Display Text	<input type="text" value="Insured Personal Information"/>

Copyright © 2014 Oracle Corporation. All rights reserved.

Figure 46 Updating a Question Group

5. Make any necessary changes.
6. Click **Update** to save your changes.
7. If you are finished, click **Cancel** to return to the Manage Question Groups screen. You also can click **Assign Questions** to go to the Assign Questions to Question Group screen.

DELETING

You can delete any question group at any time. Question groups that are in use can be deleted. The question group will not be removed from Worksite until the release has been published.

Deletes are permanent. Please make sure this is the action you want to take. You cannot undo a delete.

To Delete:

1. Open the **product** where you want to delete a question group.
2. Select the **questionnaire** where you want to work. Click **Open**.
3. Select **Question Group** on the top bar menu. This opens the Manage Question Groups screen.
4. Click the **edit icon** in front of the question group you want to edit. This opens the Question Group screen where you can delete the question group.

The screenshot shows the Oracle Insurance Data Capture Palette interface. At the top, the title is "ORACLE Insurance Data Capture Palette" with a version number "Version: 05.02.00". Below the title is a navigation bar with links: Products, Questionnaire, Risk Objects, Tabs, Question Groups, Questions, Releases, Workbench, and Help. The current page is "Product - Sample Product 09 Version 1 | Questionnaire: SampleQuestionnaire1".

The main content area is titled "Manage Question Group - Insured Personal Information". It contains a form with the following fields:

- ID:** 1304
- Name:** InsuredPersInfo
- Risk Object:** Product09.Insured (with a "Select" button)
- Columns:** Questionnaire Default (dropdown menu)
- Display Text:** Insured Personal Information

At the bottom of the form, there are four buttons: "Update", "Cancel", "Delete" (highlighted with a red box), and "Assign Questions".

Copyright © 2014 Oracle Corporation. All rights reserved.

Figure 47 Deleting a Question Group

5. Click **Delete**. A Confirmation message will be displayed.

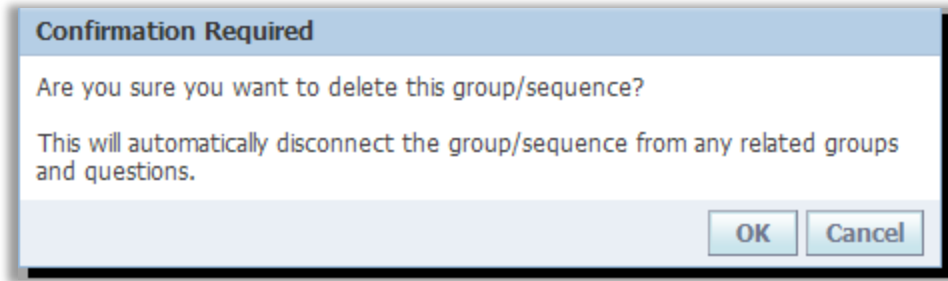


Figure 48 Delete Confirmation

6. Click **OK** to delete the question group. The screen will refresh and you will be placed on the Manage Question Groups screen. Your question group will no longer be listed.

TIP: *If you are unsure or this is not the action you want to take, click Cancel.*

QUESTIONS

The Manage Question screen is where you create, edit and manage questions. A *Question* is a label that should prompt the user for the data that is being collected. Questions are automatically created in Palette from the product Fields when the product is published (Product Implementation). Additional questions may be created in Palette when the information gathered in that question is used only by Data Capture.

After you select a product work in, the Question menu option will be visible at all times. You do not need to select a questionnaire. Questions are not unique to the questionnaire. Questions are unique to the product where they were created.

On the Manage Question screen you can:

- Create new questions
- View and edit existing questions
- Copy questions
- Search for questions

FIELDS

There are eleven fields on the Manage Questions screen:

- **Edit** - Select the edit icon when you want to edit the question. Editing a question includes deleting the question also.
- **Copy** - Select the copy icon when you want to copy a question.
- **ID** - This is a system generated ID number. This is an information only field and cannot be changed.
- **Risk Field** - The product configuration Field from which this question was created. This is also used as the mapping ID (mId).
- **Risk Object** - The product configuration object in which this field was created.
- **Question Text** - Question Text is the label that should prompt the user for the data that is being collected.
- **Control Type** - Identifies the answer control (text box, dropdown list, etc.). Some control types are automatically determined based on the product configuration field Data Type selected. If the automatically selected control type is not appropriate, it can be changed in Palette, and will have no effect on the product configuration Data Type.

PC Field – Data Type	Palette Question – Control Type
String	Single Line Text Input
Integer	Single Line Text Input
Decimal	Single Line Text Input
XML	Multi Line Text Input

PC Field – Data Type	Palette Question – Control Type
Date	Calendar
Time	Single Line Text Input
Date-Time	Single Line Text Input
Currency	Single Line Text Input
Boolean (true/false)	Select Boolean Checkbox
Phone	Single Line Text Input
Tax ID	Single Line Text Input
Percent	Single Line Text Input
String Enumeration	Single Select Drop Down
Integer Enumeration	Single Select Drop Down
Decimal Enumeration	Single Select Drop Down

- **Required** - (True/False) whether an answer is required for the question required.
- **Question Type** - The question type controls the behavior of the question.
- **Parent ID** - Displays the numeric identifier of the parent question, if applicable.

ORACLE Insurance Data Capture Palette Version: 05.02.00

Products | Questionnaire | Risk Objects | Tabs | Question Groups | **Questions** | Releases | Workbench | Help

Product - Sample Product 09 Version 1 | Questionnaire: SampleQuestionnaire1

Manage Questions

New Question Search Records per page: 25

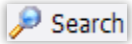
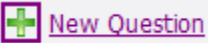


Edit	Copy	ID	Risk Field	Risk Object	Question Text	Control Type	Required	Question Type	Parent ID
		7229	FirstName	Product09.Coinsured	First Name	Single Line Text Input	False	Simple	
		7230	MiddleName	Product09.Coinsured	Middle Name	Single Line Text Input	False	Simple	
		7231	LastName	Product09.Coinsured	Last Name	Single Line Text Input	False	Simple	
		7232	GenderCd	Product09.Coinsured	Gender	Radiobox	False	Simple	
		7233	BirthDate	Product09.Coinsured	Date of Birth	Calendar	False	Parent/ Trigger	
		7234	Age	Product09.Coinsured	Age	Label	False	Simple	7233
		7235	MaritalStatusCd	Product09.Coinsured	Marital Status	Single Select Drop Down	False	Simple	
		7236	OccupationDesc	Product09.Coinsured	Occupation	Single Line Text Input	False	Simple	
		7237	RelationshipToInsuredCd	Product09.Coinsured	Relation to Insured	Single Select Drop Down	False	Simple	
		7238	FirstName	Product09.Insured	First Name	Single Line Text Input	True	Simple	
		7239	MiddleName	Product09.Insured	Middle Name	Single Line Text Input	False	Simple	
		7240	LastName	Product09.Insured	Last Name	Single Line Text Input	True	Simple	
		7241	GenderCd	Product09.Insured	Gender	Radiobox	False	Simple	
		7242	BirthDate	Product09.Insured	Date of Birth	Calendar	True	Parent/ Trigger	
		7243	Age	Product09.Insured	Age	Label	False	Simple	7242
		7244	MaritalStatusCd	Product09.Insured	Marital Status	Single Select Drop Down	False	Simple	
		7245	OccupationDesc	Product09.Insured	Occupation	Single Line Text Input	False	Simple	
		7246	DoNotSolicitInd	Product09.Insured	Opt Out (Do Not Solicit)	Select Boolean Checkbox	False	Simple	
		7247	EffectiveDate	Product09.Policy	Effective Date	Calendar	False	Parent/ Trigger	
		7248	ExpirationDate	Product09.Policy	Expiration Date	Label	False	Simple	
		7249	PolicyPremium	Product09.Policy	Policy Premium	Label	False	Simple	
		7250	PolicyNumber	Product09.Policy	Policy Number	Label	False	Simple	

Figure 49 Manage Questions

FUNCTIONALITY

All functionality is handled by selecting an icon for the question or clicking the Add New Question option at the top of the screen. There are no right click menus.

Menu Options:

 Search	Searches question properties for the criteria that have been entered.
 New Question	Creates a new question.
	Opens the question group for editing.
	Copies the question.

Searching

Searching can be done on Manage Question screen.

Searches on the Manage Question screen are done on any element listed on the screen except Risk Object. The results returned will be every question that meets the search criteria. You will be able to edit or copy questions from the results returned.

The search field is located at the top of the screen. Searching can be done at any time and does not affect the questions already created.

To Search:

In the Manage Question screen, enter your search criteria and click the search icon at the end of the field. Results will be displayed in the main body of the screen.

To clear the field, clear the search field and search against a blank field. This will return all available questions.

QUESTION PREPARATION

Doing prep work will allow for better utilization of the application. The majority of this should be addressed in the creation of product configuration fields. Knowing the questions you need to ask and types of answers you are likely to get will assist you in creating Questions and Answer Maps. There are two main things to keep in mind while planning your questions:

- The *Input*: Where your data comes from.
- The *Output*: Where your data will go.

The input and the output must work together to define the behavior of your question.

Input:

The Input can come from a wide variety of resources that you may use to collect data. Does this data come from a customer or another system? Will the information be entered by an applicant or obtained from a database? Will you have a paper application you can use as a base? Are there rules and requirements guides for you to follow?

How you are getting the data and what form the data will be in can help determine whether you need a simple question or a more complex question that may lead to additional questions.

Output:

The Output is more than just the output you expect. Output also defines what can be done with the data once OI DC has finished processing it. Where is the data going? Does this data need to go into a policy administration system, claims system, business intelligence report, form or a rating engine?

For example, if you are collecting data from an insurance application, you will most likely have various Name fields. First name, last name, and middle initial are usually required. But you also may require co-insured names, maiden names or suffix. Each of these fields may need to be passed through to one system or more systems. Name fields may be required to create policy or print a form but name fields are usually not required to obtain a rating.

Likewise, you may be collecting information that goes only into a rating system, like number of years driving or parking garage ZIP code.

These are just a few of the things to keep in mind when creating questions, and answer maps. By reconciling the two factors; the input and the output, you can create a questionnaire that will help you to get the information you want and place it where it needs to go.

FORMING QUESTIONS

There are many ways to form and create questions in Data Capture. You can create questions with as much or as little complexity as you need. You can create questions that trigger more questions or questions that can be answered with a simple yes or no. There are no limits to how you can create your questions.

Prior to creating questions, you should know the behavior of the question you want to create. You may want to plan the question type you want to use and the question condition you want to use ahead of time.

Question Types

The type of question you are asking can determine the question type you may want to use. There are multiple question types:

- **Panel**
- **Parent/Trigger**
- **Postback**

- **Simple**
- **Table**

Panel

The panel type questions are used to create reports or sub-forms.

Parent/Trigger

The parent/trigger questions are reflexive questions that will always trigger a change event that forces associated questions to reevaluate themselves.

Parent Questions:

- A parent/trigger question can be a parent question and contain child questions.
- When the parent question is selected for a question group, all of the associated child questions will go with it.
- A child question may or may not have display conditions.
- A child question will automatically evaluate when the parent is answered.

Trigger Questions:

- A trigger question can have associated dependent questions.
- Dependent questions must be included in the question group.
- Dependent questions are identified in the trigger questions answer map.
- Dependent questions will only reevaluate when included in the triggers answer map.

Usage:

Use this question type when you have a question that may require further information to complete and you want the additional information on the same tab. For example, “Is your mailing address the same as your resident address?” If the answer is No, then the mailing address questions can be made visible.

Postback

A postback question also can require additional information and like a parent/trigger question, can be a parent and contain child questions. The main difference is that postback questions post information to the server and refresh the entire tab. On this question type, any event related to the postback question occurs when the value is changed.

There are cases where you have to use a postback question type; however, you should use postback questions carefully. A postback question type causes the entire page to refresh, which takes time.

Usage:

Use a postback question type when you know the process you want to follow when the answer is returned. For example, “Is there a Coinsured?” You know the answer will be Yes or No. You may want to see that information on the same page as the question. You also will need to create an instance for the

Coinsured. In that case you would use a postback question type to refresh the entire page and create a new instance.

Postback Questions in Worksite:

When a postback parent question has a child question, a plus sign (+) can be displayed in the question label. This will let you know that when a parent/trigger question needs to display the children, the Worksite frame will change to allow the children to be displayed. The application frame around it will remain static.

TIP: *The parent/trigger question indicator * or + can be made non-visible or visible by setting the Display Dependent Question Indicator option to true in Worksite configuration. The default is that the icons will be displayed.*

Simple

A simple question moves data forward and does not have dependent or child questions associated with it. Use a simple type of question when you have a question where a response can be made that fully answers the question. All child questions are a simple question type.

For example, “What is your name?” This question usually does not require another question to complete the response. Also, this question generally can be moved to the output without any further information to complete the question.

Table

The table type questions create tables which allow users to create multiple instances of a particular object.

NEW

Question used to share information outside of Data Capture should be created in Product Configuration. When information applies only to Data Capture, new questions can be created. The options you will have available when creating a new question will depend upon the type of question you choose to create. There are 6 tabs in the New/Edit question screen. Not every tab will be available for every question.

- General Info – General information regarding the question.
- Answer Display Format – display dimensions for the answer field.
- Control Properties – For Panel and Table question types. Allows for managing properties that are specific to these question types
- Behaviors – set behaviors for the question
- Display Condition – Sets the conditions for the display of the question.

- Help text – Enter the help text to be displayed when a cursor is held on the worksite question help icon.

Creating a New Question:

1. Open the product where you want to create a question.
2. Select the **questionnaire** where you want to work. Click **Open**.
3. Select **Questions** on the top bar menu. This opens the Manage Questions screen.
4. Click **Add New Question** to open the Add New Question screen.

The screenshot shows the 'Add New Question' form in the Oracle Insurance Data Capture Palette. The 'General Info' tab is active. The form includes the following fields:

- ID:** New Question
- Question Type:** -- Select One -- *
- Risk Object:** (empty)
- Risk Object Field:** (empty)
- Data Type:** -- Select One --
- Control Type:** -- Select One -- *
- Mapping ID:** (empty)
- Parent Question ID:** (empty)
- Child Question Sequence #:** (empty)
- Text:** (text area)
- Required:** This question requires an answer
- Default Value:** (empty)

Buttons at the bottom: Create, Cancel, Delete.

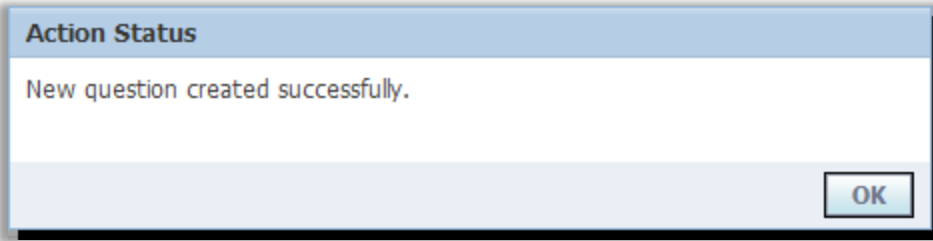
Copyright © 2014 Oracle Corporation. All rights reserved.

Figure 50 Creating a New Question

5. The first tab is the only tab that is accessible until the question is created. Complete any field you may need for the question. Every question will require a Question Type and Control Type. While not required, it is strongly recommended that you also include a Mapping ID and text.

TIP: If you do not have all the information you need, you can create your question to this point and finish at a later time.

6. Click **Create**. A message will be displayed. If you are successful, click **OK**. If there is an error, please correct the error to continue.



Clicking Create will save your entries and allow you to continue. If you want to stop at this point and continue later, you can by clicking Cancel to leave the screen.

If this is not the action you want to take, click Cancel to return to the Manage Questions screen. If you have not clicked Create, your work will not be saved.

GENERAL TAB FIELDS

Question fields are the fields you will be presented with when you create or edit a question. Fields can be simple requiring only a numeric value or a text value, such as Child Sequence # and Help Text. Other question fields will require you to make a selection from a list, such as Question Type or Answer Map. A more complex field is Display Condition. This field can either be blank or contain a simple format or a more complex format, depending on what you require from the question.

ID –	A system generated ID number. This is an information only field and cannot be changed.
Question Types –	<p>The type of question. Question Types is a multiple choice field where you can select the value you want. This is a required field. There are five question types:</p> <ul style="list-style-type: none"> • Panel • Parent/Trigger • Postback • Simple • Table <p>Please see Question Types for more information.</p>
Risk Object –	The Risk Object.
Risk Object Field –	The Risk Object Field ID (mId) is a product configuration field Custom ID. This mId can also be used in Question Condition Language and answer maps. Risk Object Field cannot be selected when a Mapping ID is entered. Either a Mapping ID or Risk Object Field is required.
Data Type –	Data types depend on the type of question selected.
Control Types –	<p>The type of answer field to be displayed. Control Types is a multiple choice field where you can select the value you want. Only one control type can be selected. A control type is required. Control types vary according to the question type selected. Some examples of control types are:</p> <ul style="list-style-type: none"> • LabeledCheckBox

	<ul style="list-style-type: none"> • SingleSelectDropDown • SingleLineTextInput • MultiLineTextInput • RadioBox • Label • HiddenConstant • MultiLevelRadioBox • SingleSelectList • Calendar • SecureTextInput • SubQuesListMgr • RiskItemTable • ReportPanel <p>Please see Control Types for more information</p>
Mapping ID –	The Mapping ID (mId) is a user created identification field. Limited to 50 characters, including spaces, this field is used in Risk Objects Name Format and data transportation. This mId can also be used in Question Condition Language and answer maps. Mapping ID cannot be entered when a Risk Object Field is selected. Either a Mapping ID or Risk Object Field is required.
Parent Question ID –	The parent question ID field is where you enter the system generated ID of the question designated to be the parent question. An entry is required only if you are creating a child question.
Child Question Sequence # –	The order child questions should be displayed. You can create up to 99 child questions in a sequence. If no sequence is chosen, child questions will be listed in the order entered. This is not a required field.
Text –	This field will hold the question, a label that should prompt the user for the data that is being collected. This field is limited to 750 characters including spaces. This is a required field.
Required –	(True/False) Check this box if an answer is required. A red asterisk (*) will be displayed on the questionnaire to indicate that this field is required. In Worksite, if the user does not complete the required question, they will not be able to continue in the questionnaire. Any question can be required. Questions are only validated if visible. If the conditions are not met, then it is not answered. The default is no question is required.
Default Value –	Sets a default value for the question. This is not a required element.

FUNCTIONALITY

There are three Menu Functions on the Create/Edit Questions screen:

- **Create** - Creates the Question. This option is available for New Questions only.

OR

- **Update** - Update the Question with your changes. This option is available on Edit Questions only.

- **Cancel** - Returns you to the Manage Questions screen. If you have not clicked Update, you will be returned to the Manage Questions screen without saving any of your changes.
- **Delete** - Deletes the selected question. This option is available on Edit Questions only.

Answer Display Format

Answer Display Format is where you can set the display parameters for the answer. This is not a required tab. Not available to Panel or Table question types.

The screenshot shows the 'Edit Question - ListOfValuesInteger' dialog box in the Oracle Insurance Data Capture Palette. The 'Answer Display Format' tab is selected and highlighted with a red box. The dialog box contains the following fields and controls:

- Height:** A text input field.
- Width:** A text input field.
- Rows:** A text input field.
- Alignment:** A dropdown menu with the text '-- Select One --'.
- Orientation:** A dropdown menu with the text '-- Select One --'.
- CSS Class:** A text input field.

At the bottom of the dialog box, there are three buttons: 'Update', 'Cancel', and 'Delete'.

Copyright © 2014 Oracle Corporation. All rights reserved.

Figure 51 Answer Display Format of a Question

Fields

Height – Enter the height of the answer control.

Width – Enter the width of the answer control.

Rows – The number of rows where a response may be entered. Rows can only be displayed for multiline text and single select list control types. Three rows is the default. The field is limited to 25 rows. This is not a required element.

Alignment – Select the alignment, left, right or center.

Orientation – Select the orientation, horizontal or vertical.

CSS Class – Enter the custom CSS Class Name.

Control Properties

Control Properties are used for Panel Sub-Form and Table question types. Allows for assigning the Risk Object Type to sub-forms and tables, and assigning table columns, defining their display title and width, and enabling the table manual merge option.

ORACLE Insurance Data Capture Palette Version: 05.02.00

Products | Questionnaire | Risk Objects | Tabs | Question Groups | Questions | Releases | Workbench | Help

Product - Sample Product 09 Version 1 | Questionnaire: SampleQuestionnaire1

Edit Question - Multi-Instance Table

General Info | Answer Display Format | **Control Properties** | Behaviors | Display Condition | Help Text

Risk Object: DCFeatures.MultiInstance Control Type: Summary Table

Enable Merge: Table Row Risk Object: DCFeatures.MultiInstance.Instance

Question to Table Mapping

Available Questions			Assigned Table Columns Questions		
Name	ID		Question Text	Display Title	Display Status
Instance Number	7280	➤	Number	Number	Included
Date Instance Added	7281	➤	Risk Item Name	Risk Item Name	Included
Instance Tree ID	7282	➤	Instance Name	Instance Name	Included
			Source	Source	Included

Figure 52 Control Properties of a Question

Behaviors

Enter the behavior of the question.

The screenshot shows the Oracle Insurance Data Capture Palette interface. At the top, it says 'ORACLE Insurance Data Capture Palette' and 'Version: 05.02.00'. Below that is a navigation menu with items: Products, Questionnaire, Risk Objects, Tabs, Question Groups, Questions, Releases, Workbench, Help. The main area is titled 'Edit Question - ListOfValuesInteger' and has several tabs: General Info, Answer Display Format, Control Properties, Behaviors (highlighted with a red box), Display Condition, and Help Text. The Behaviors tab contains a large empty text area with a 'Make Conditional' button on the right. Below the text area are four sections: Function, Actions, Integration Activity, and Answer Maps, each with an 'Edit' button. At the bottom of the tab are 'Update', 'Cancel', and 'Delete' buttons.

Copyright © 2014 Oracle Corporation. All rights reserved.

Figure 53 Behaviors of a Question

There are four behaviors that can be defined:

- **Function** – A function is dependent on another answer where you compute and return an answer.
- **Actions** – An action triggers a callout or an action to happen. For example, you can trigger a flag. When using as a callout, the actual callout is a function.
- **Integration Activity** – Activities are well known, pre-defined business processes between Data Capture and an external system.
- **Answer Maps** – Answer maps can be used to allow for a specific process to be performed when specific conditions are in place.

The question behaviors can be made Conditional by setting parameters with the Make Conditional option.

Function

A function is dependent on another answer where you compute and return an answer.

Functions return a single value to the question hosting the <Func> command. It is assumed that the control that will display this value is a Text Box or a Label since only a single value will be returned.

When functions occur will depend upon the function.

The function can be edited or deleted. Deletion clears the fields, the function Edit will still be listed on the tab.

The screenshot shows a web browser window titled "-- Webpage Dialog" with the URL "http://10.100.100.10/DCP52/Pages/Questions/EditFunction.aspx?condID=". The main content area is a form for editing a function. At the top, there is a "Select Function Type" dropdown menu currently set to "Object Instances" and a "Description" text box containing "Date Calculation". Below this, there are three sections, each with a blue button on the left and a text box on the right:

- PROPERTY**: The button is labeled "PROPERTY" and the text box contains "Any Instances".
- ITEM CONTEXT**: The button is labeled "ITEM CONTEXT" and the text box contains "Path". Below this text box is a checkbox labeled "Exclude Current Instance" which is currently unchecked.
- CATEGORY**: The button is labeled "CATEGORY" and the text box contains "PCFeatures/PCValidations".

At the bottom of the dialog, there are four buttons: "OK", "View XML", "Delete", and "Cancel".

Figure 54 Question Behavior Function

1. Select the Function Type from the drop down. The description is updated with your selection.
2. The fields displayed depend upon the function selected.
3. Starting at the top, select the first available field. The options for the field are displayed to the right.
4. Select the option you want and move to the next field.

5. Click OK to save your entry.
6. Click Update to save your entry.

Delete clears the field.

Cancel closes the screen without making any changes.

If you want to view the XML for the function, click View XML. A separate screen is displayed with the XML.

Available Functions Types:

The available function types vary according to the question data type. For example, if the question data type is numeric, the mathematical functions are displayed.

- **Date Difference** - Performs subtraction of date values and returns their difference as an integer. The expected date values must be in valid yyyy-MM-dd format.
- **Date Calculation** - Calculates and returns a date value from a start date the 'span' integer value.
- **Lookup** - Returns the the result of the lookup expression as the value as the answer value.
- **Current Object Instance** - eturns the specified property of the current object instance as the answer value.
- **Current System Datetime** - Returns the current system (server) date-time stamp as the answer value.
- **Object Instances** - Checks to see if any object exists for the specified query. Returns the specified property of the object instance as the answer value or list of valid answer values.
- **Add Values** - Performs addition of values and returns their sum.
- **Divide Values** - Performs division of values and returns their quotient.
- **Multiply Values** - Performs multiplication of values and returns their product.
- **Subtract Values** - Performs subtraction of values and returns their difference.
- **Percentage Of** - Calculates and returns the percentage value of a specified number value.
- **Add Child Values** - Sums values across all instances of the specified child object and field.

For more details on functions, please see Appendix B Question Behavior – Functions.

Actions

An action triggers a callout or an action to happen. For example, you can trigger a flag. When using as a callout, the actual callout is a function.

Actions can be used to set the value of another question or to perform tasks that do not affect the value of the current question hosting the <Action> command.

Actions provide the ability to utilize the currently defined actions to set values of other questions or to perform tasks that do not affect the value of the current question hosting the <Action> command.

Actions occur when the question is submitted, when you leave the page or during a post back.

A question behavior may contain multiple actions.

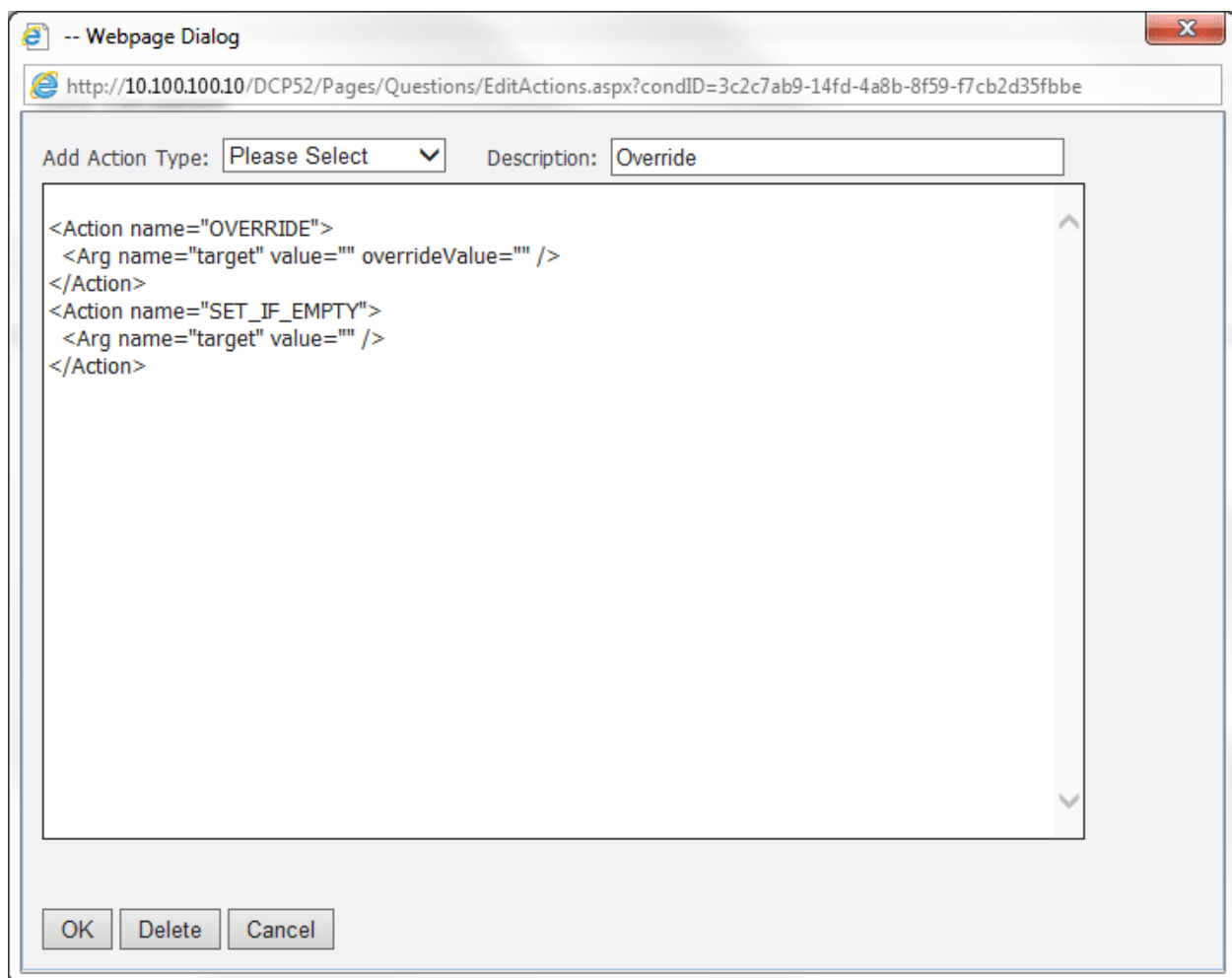


Figure 55 Question Behavior Action

1. Select the Action Type you want from the drop down. The description will be updated with your latest selection.
2. The action template XML is displayed in the body of the screen. Edit the values as needed.

3. Click OK to save your entry.
4. Click Update to save your entry.

Delete clears the field.

Cancel closes the screen without making any changes.

Available Action Types:

- **Add Item** - Manages the creation of a single object instance depending on create condition specified.
- **Delete Risk Items** - Allows an answer to a question to delete risk items of a specific object.
- **Manage Risk Item** - Manages the creation and deletion of a single risk item depending on create and delete conditions specified.
- **Override** - Overrides the values of one or more question items with the value of the current question or that of an optional explicit override value.
- **Refresh Answer** - Forces one or more questions to refresh their current values by executing any defaults, lookup commands, functions, or actions assigned.
- **Set If Empty** - Set any of the specified questions whose values are empty to the value of the question whose response map defines this action.
- **Calculate Answer** - Looks up the values of one or more questions and/or constant values and sets the calculated result as the value of the specified target question.

For more details on Actions, please see Appendix C Question Behavior – Action.

Integration Activity

Callouts are integrations between Data Capture in external systems.

Generic Callouts are custom, user-defined integrations with no specific data expected in the response (other than transaction status), and no specific behavior expected in Data Capture based on the callout and/or response.

Activities are well known, pre-defined business processes between Data Capture and an external system. OIGC will expect specific data in responses and have established behavior based on each activity type. Sample business processes include:

- Rating
- Underwriting
- List of Values
- Policy Submission (i.e., Issuance, Policy Bind)
- Supplemental Data (e.g., underwriting reports like CLUE, MVR, Credit Score, Replacement Cost Estimate)

All callouts from Data Capture must go through a supported Enterprise Service Bus (ESB). No callout can be made directly from a page to the end service. The following ESBs are supported:

- IBSS (Java)

An activity **<Activity />** map triggers a specific callout type to happen.

A question behavior map may contain one activity.

All activity question behaviors have the same attribute, argument, and filter options, although the values of these options may differ based on the “type” of activity

ALL ACTIVITIES

ATTRIBUTES:

- **type** - (required) the name of the activity type
 - Document
 - ListOfValues
 - ProjectSubmit
 - Rating
 - Rule (Underwriting)
 - SupplementalData
- **serviceAdaptorName** - (required) the name of the service adaptor as registered with IBSS
- **executionContext** - defines when the callout will execute. Valid values are
 - **onLoad** (default) meaning when the page loads
 - **onSubmit** meaning when the page is submitted
 - **onLoadAndSubmit** meaning when the page loads and when the page is submitted
- **showStatusMessage** - (optional) determines whether a callout status and transaction message(s) will display, based on the transaction status
 - **always** - (default if none selected) status message is always displayed
 - **never** - status message is never displayed
 - **pass** - status message is displayed only when status is PASS
 - **fail** - status message is displayed only when status is FAIL
- **includeProjectData** - (optional) determines whether the full project data payload will be included with the activity request

- **true** (default if none selected)
- **false**

ARGUMENTS:	ATTRIBUTES:
<Arg/>	<p>Arguments are user-defined optional values used to communicate to the adaptor implementation the target service provider and/or the specific service to be executed.</p> <p>Additional user-defined arguments can be used to further refine the target source/data. For example the user may want (or need) to specify a specific table and column when searching for information in a database, or a specific element and attribute when searching for data in an XML document.</p> <p>The person specifying the Arguments in an Activity answer map must know what Arguments are supported by the activity adaptor.</p> <p>There are no required system-defined arguments. The user must define custom arguments with the 'name' and 'value' attributes.</p> <ul style="list-style-type: none"> • name - (required) the user-defined argument name. • value - (required) the user-defined argument value.
FILTERS:	ATTRIBUTES:
<Filter/>	<p>Filters are optional user-defined values. They are used to further qualify specific data (or rows) for selection. The adaptor implementation will use these filters to determine what data needs to be returned to Data Capture. The person specifying the Filters in an Activity answer map must know what Filters are supported by the activity adaptor.</p> <ul style="list-style-type: none"> • name - the filter name. In many cases, this name will be the same as the column name, element name, etc. against which the value will be compared. An exception is Insbridge SoftData, which uses the index attribute to locate the target field. • type - (required) the type of filter <ul style="list-style-type: none"> ▪ mid – instructs the system to use the "mid" field of the current question as a filter ▪ static – indicates the "value" attribute of the node will be used as a filter ▪ lkup – indicates the "value" attribute should be parsed and run as a lookup function, then the resulting value should be used as a filter • value - contains a value that will be used to match the target data. This can be a QCL statement that looks up the filter value from a data value in the project. • index - (optional) for repositories that require an integer locator, like Insbridge SoftData, the optional index attribute may be used
EXAMPLE (values are intentionally blank)	<pre><Activity type="" serviceAdaptorName="" executionContext="" showStatusMessage="" includeProjectData=""> <Arg name="" value=""/> <Filters> <Filter name="" type="" value="" index=""/> </Filters> </Activity></pre>

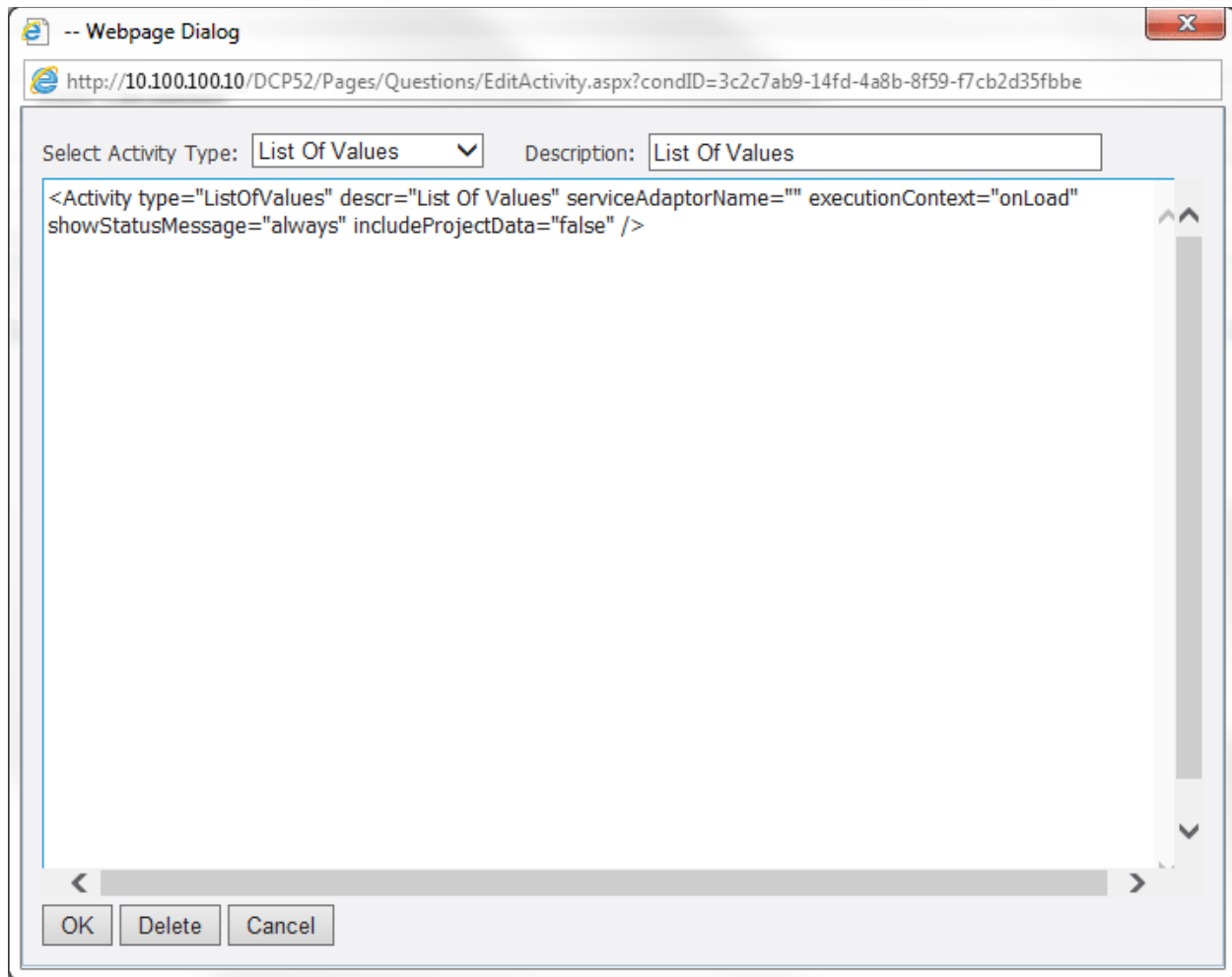


Figure 56 Question Behavior Integration Activity

1. Select the Activity Type you want from the drop down. The description will be updated with your selection.
2. The activity template XML is displayed in the body of the screen. Service Adapter name is required. Valid attributes values must be entered.
3. Click OK to save your entry.
4. Click Update to save your entry.

Delete clears the field.

Cancel closes the screen without making any changes.

Available Activity Types:

- **Document** - Initiates a document activity.
- **List of Values** - Initiates a list of values (LOV) activity.

- **Project Submit** - Initiates a policy submit activity.
- **Rating** - Initiates a rating activity.
- **Rule (Underwriting)** - Initiates a rule activity.
- **Supplemental Data** - Initiates a supplemental data activity.

For more on Activities, please see Appendix D.

Answer Maps

Answer maps can be used to allow for a specific process to be performed when specific conditions are in place.

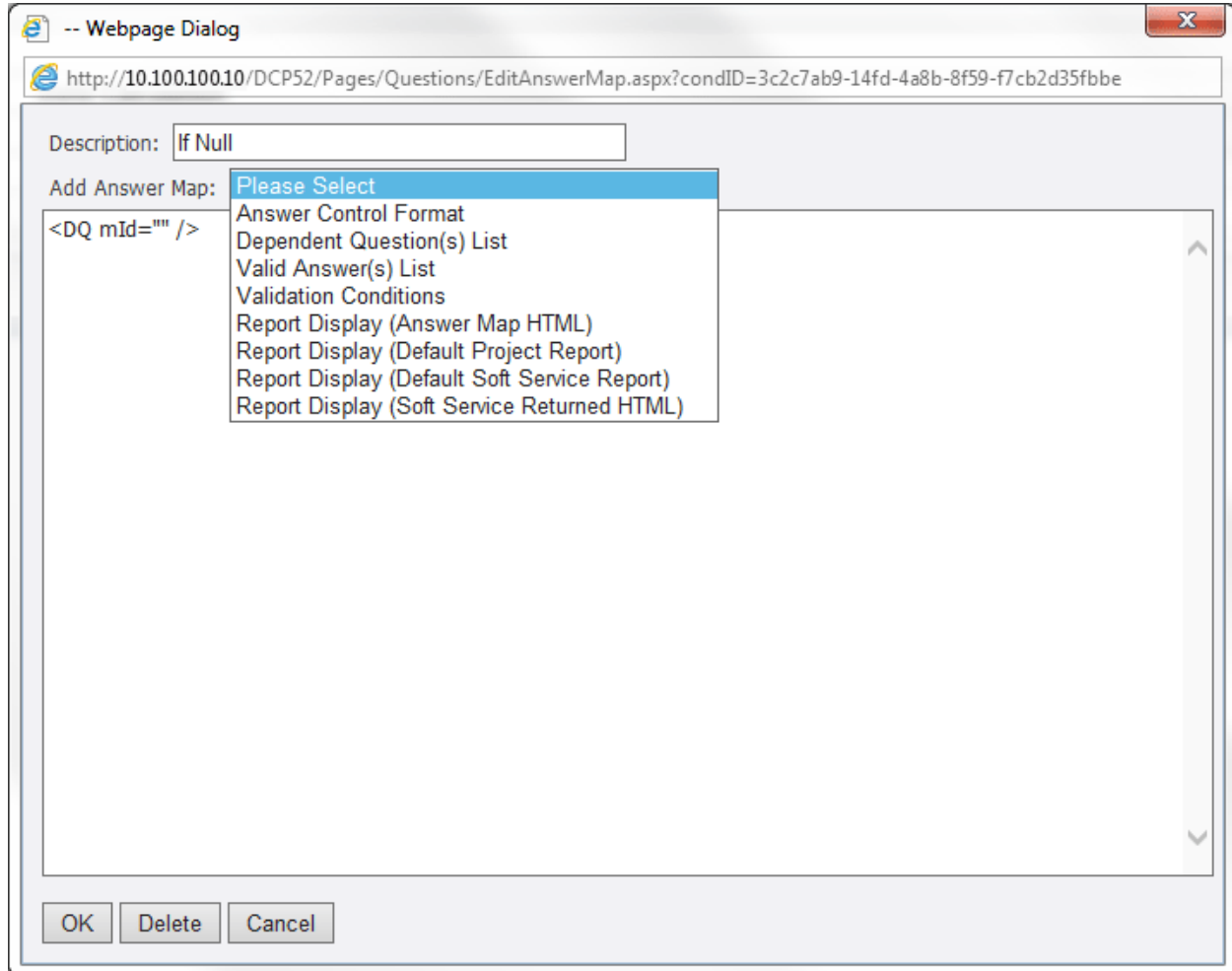


Figure 57 Question Behavior Answer Map

5. Select the Answer Map you want from the drop down.
6. Edit as needed.
7. Click OK to save your entry.
8. Click Update to save your entry.

Delete clears the field.

Cancel closes the screen without making any changes.

Available Answer Maps:

- Answer Control Format
- Dependent Question List
- Valid Answer List - The XML A answer map is used when you want to present a list of available answers. For example, when you want to use a dropdown list. You can list as many selections as you need.
- Validation Conditions - Allows the user to specify a condition, which – if true – will display an error message.
- Report Display (Answer Map HTML)
- Report Display (Default Project Report)
- Report Display (Default Soft Service Report)
- Report Display (Soft Service Returned HTML)

Make Conditional

If more than one question behavior is present, then question behaviors can be made conditional. Adding a Make Conditional statement creates a </choose> answer map. Not available on Panel type questions. If there is only one condition, do not add a make conditional statement.

Conditional question behaviors contain:

- **when** - One or more when tags with a test attribute The when tag requires a test attribute whose value is the QCL statement describing the condition for the availability of the set of values. A choose answer map must always have a when.
- **Map** - The Map is a test attribute that contains the answer map data applicable to the condition.
- **otherwise** - The otherwise an optional test attribute that contains the Map applicable to all other conditions that are not identified by when tags. Otherwise must be used with a when.

Adding a Make Conditional Option

1. On the Behaviors tab, select Make Conditional. A separate screen is displayed.
2. Select the –Insert Object Reference – field and the options are populated to the side. The other fields depend upon the selection made here.
3. Select the option you want.

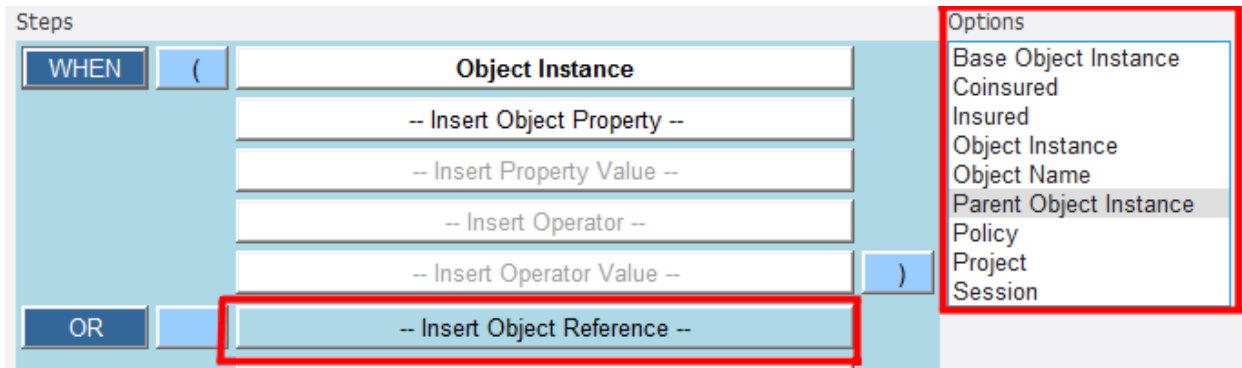
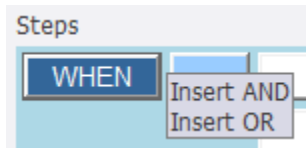


Figure 58 Selecting the Options for Make Conditional

4. If available, select the –Insert Object Property – field and the options are populated to the side.
5. Select the option you want.
6. If available, select the –Insert Property Value – field and the options are populated to the side.
7. Select the option you want.
8. Select the –Insert Operator – field and the options are populated to the side.
9. Select the option you want.
10. Select the –Insert Operator Value – field and the options are populated to the side.

11. Select the option you want.
12. If another condition needs to be added, click WHEN and select to insert either an And condition or an OR condition.



13. If parentheses are needed, click the field in front of the –Insert Object Reference – to add the Open parentheses [(].
14. The close parentheses [)] is added in the field at the end of the –Insert Operator Value – field.
15. When complete, click OK to save your entry.

The –Insert Operator Value – field allows for a Custom (or Literal) value to be entered. If you select this option, a field for a custom value is displayed. Enter the value you want to use and click Set.

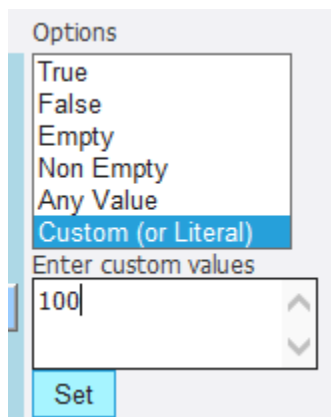


Figure 59 Entering a Custom Value

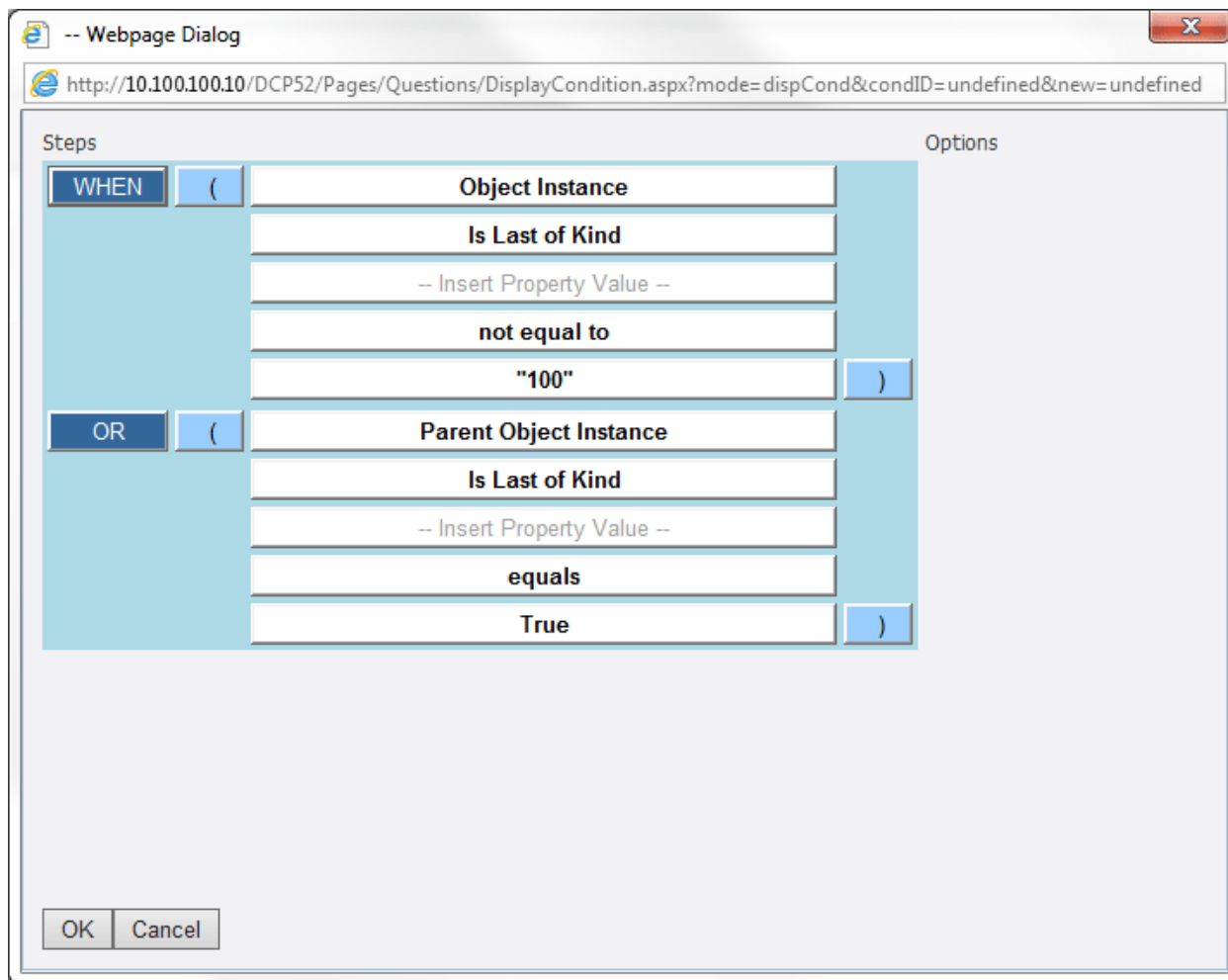


Figure 60 Make Conditional Function on a Question

When a Conditional behavior is added, the Question Conditional Language is displayed.

A Make Condition question behavior allows the use of multiple maps with if -> then -> else conditional structure.

<choose />	
The choose tag indicates that this is a conditional answer map	
<when/>	REQUIRED contains the Map applicable to the specified test condition.
ATTRIBUTES:	
test=""	The value of the QCL statement describing the condition for the availability of the set of values.
<Map/>	REQUIRED Each <when/> and <otherwise/> element must contain a valid, properly formed answer map
<otherwise/>	REQUIRED Contains the Map applicable to all other conditions that are not identified by when elements.
Example:	<code><choose> <when test="item.isFirstOfKind eq true and (item.category eq</code>

```

SubFormInstance or item.category eq Instance)">
  <Map>
    <A value="FirstOfKind" name="First Of Kind"/>
  </Map>
</when>
<when test="item.isFirstOfKind neq true and (item.category eq
SubFormInstance or item.category eq Instance)">
  <Map>
    <A value="" name="-- Select --"/>
    <A value="NotFirstOfKind" name="Not First Of Kind"/>
  </Map>
</when>
<otherwise>
  <Map>
    <A value="" name="-- Select --"/>
    <A value="AllOther" name="All Other"/>
    <A value="OnlyOfKind" name="Only Of Kind"/>
  </Map>
</otherwise>
</choose>

```

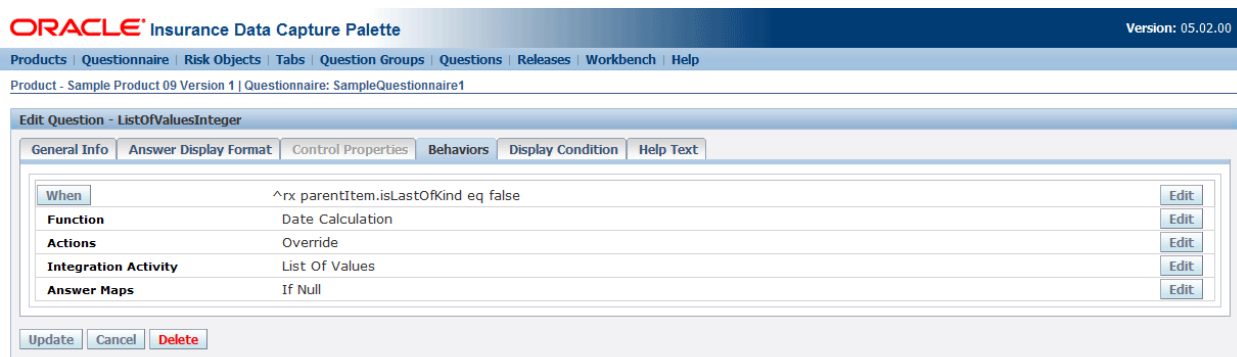


Figure 61 Completed Behaviors Tab

Display Condition

Every question in OI DC can use a display condition if needed. The Display Condition tab describes the condition under which this question will display. The Display Condition field can be as simple or as complex as you need, depending on what you require from the question. Before completing the display condition, you need to ask under what circumstances do you want this question displayed and how do you want the question displayed? Display Conditions may rely on other values. This field is limited to 510 characters including spaces. This is not a required field.

Please see Question Condition Language for more information.

The screenshot shows the Oracle Insurance Data Capture Palette interface. The top navigation bar includes 'Products', 'Questionnaire', 'Risk Objects', 'Tabs', 'Question Groups', 'Questions', 'Releases', 'Workbench', and 'Help'. The current page is 'Product - Sample Product 09 Version 1 | Questionnaire: SampleQuestionnaire1'. The main window is titled 'Edit Question - ListOfValuesInteger' and has several tabs: 'General Info', 'Answer Display Format', 'Control Properties', 'Behaviors', 'Display Condition' (which is highlighted with a red box), and 'Help Text'. Inside the 'Display Condition' tab, there is a table with columns for 'Display this question WHEN', 'OR', '(Object Instance / Parent Object Instance)', '[Is Last of Kind]', '[not equal to / equals]', and '"100" / True'. Below the table is a text area for 'QCL:' containing the expression '^rx (item.isLastOfKind neq 100) or (parentItem.isLastOfKind eq true)'. At the bottom of the tab, there are buttons for 'Add / Edit', 'Hide Report', 'Update' (highlighted with a red box), 'Cancel', and 'Delete'.

Figure 62 Display Condition Completed

To add a display condition, click Add/Edit and a separate screen is displayed. The entry of a display condition is the same as Make Conditional.

Click Update to save your entry.

When a Display Condition is added, the Question Conditional Language (QCL) is displayed. You can hide the QCL by clicking Hide Report. For more on QCL, please see Chapter 11 Question Condition Language.

Delete clears the field.

Cancel closes the screen without making any changes.

Display conditions are defined by the use of QCL statements. There are no restrictions by question type.

Hidden Constant:

When using with a hidden constant, different functionality may apply. The answer can be captured without being displayed. If you do not want a hidden constant to be answered, you must enter a value into the display condition.

The actions or function related to a hidden constant always occurs unless its display condition is not met.

Help Text

Help information can be added for each question by completing the Help Text section of the question entry screen. In Worksite, the help text can be viewed by hovering your mouse over the blue question mark or by clicking on the question mark. The help text will be displayed in a popup. Help text is not a required field.

The screenshot shows the Oracle Insurance Data Capture Palette interface. At the top, the title bar reads "ORACLE Insurance Data Capture Palette" and "Version: 05.02.00". Below the title bar is a navigation menu with items: Products, Questionnaire, Risk Objects, Tabs, Question Groups, Questions, Releases, Workbench, and Help. The main content area is titled "Edit Question - ListOfValuesInteger" and contains several tabs: General Info, Answer Display Format, Control Properties, Behaviors, Display Condition, and Help Text. The Help Text tab is currently selected and highlighted with a red box. Below the tabs is a large text area labeled "List of values." which is currently empty. At the bottom of the text area are three buttons: Update, Cancel, and Delete. The Update button is highlighted with a red box. The footer of the screen contains the text "Copyright © 2014 Oracle Corporation. All rights reserved."

Figure 63 Help Text on a Question

1. To enter Help Text, type or paste your entry in the field.
2. Click Update to save your entry.

Delete clears the field.

Cancel closes the screen without making any changes.

Limit of 5000 characters.

Question Conditions

The question type defines the behavior of the question. Question conditions can help you to define the kind of the questions you want to ask and how you may want to construct them. You can create questions that depend upon another question and are only displayed when that question is selected. Or you can create questions that are conditional on other questions.

Child Questions:

Parent and child questions are a fairly common question classification. You may want to create a question structure that asks broad questions and then asks for details depending upon the answer.

- Every child question must have a Question Type of Simple.
- Child questions are not in any question group. They are tied to the parent. When selecting a parent question for inclusion in a question group, the child questions will not be listed with it.
- Child questions can be displayed in an exact order if necessary. The default order is the order entered.
- Child question will have only one parent. The parent question must be identified in the child question definition.
- Multiple child questions can share the same parent.
- Child question are shaded and indented when displayed in Worksite.

Dependent Questions:

A Dependent Question is a question that is triggered by another question.

- A dependent question must be added to a Question Group.
- A dependent question is identified in the trigger questions Answer Map.
- A dependent question is visible if it does not have a display condition or the display condition is met.

Question Visibility

- Child questions will be visible according to the child's display condition. If there are no conditions, they will be displayed.
- The visibility of the child question depends upon the parent question. If the parent is not visible then the child question will not be visible.
- A dependent question's visibility is dependent upon the trigger question on the same tab.

Questions do not hold answers when values are updated. For example, a trigger question is answered and a required dependent question is now visible. The dependent question is answered. Then the trigger question is updated and the dependent question is no longer required. Then the trigger question is updated again and the dependent question is once again required. The previous answer will be lost. You must enter it again.

Mapping IDs

Mapping IDs are created as the Risk Object Field from the product configuration field Custom ID when the product is published to Palette. Mapping IDs are also created when a new question is defined in Palette. Both types result in the creation of the 'mld' that will be used for reference throughout Palette.

All Data Capture data transportation - import, export, and internal - utilizes mapping IDs. Mapping IDs represent an objects attributes or properties.

Risk Object Field or Mapping ID=mld.

Where:

mld	– lower case m, capital l, lower case d
-----	---

Mapping IDs do not have to be unique. You can duplicate ID's and have multiple questions using the same Risk Object Field or Mapping ID. For example, on your questionnaire you may have two questions regarding age. One question calculates the age and one question asks for it directly. In some cases, the calculated question is displayed in other cases the direct input question is displayed. Both questions will get the answer you need. You could use the same Risk Object Field or Mapping ID on both questions to assure that whichever question is answered, the age gets carried through to the output.

If there is more than one question with the same mld in a risk object, only one question will store a value. If the questions with the same mld are all visible and stored, only the last question value will be included in the output. It is highly recommended that only one question using a shared mld is made visible at any given time.

Control Types

You must select one of the available control types for your question.

Some control types are automatically determined based on the product configuration field Data Type selected. If the automatically selected control type is not appropriate, it can be changed in Palette, and will have no effect on the product configuration Data Type.

PC Field – Data Type	Palette Question – Control Type
String	Single Line Text Input
Integer	Single Line Text Input
Decimal	Single Line Text Input
XML	Multi Line Text Input
Date	Calendar
Time	Single Line Text Input
Date-Time	Single Line Text Input
Currency	Single Line Text Input
Boolean (true/false)	Select Boolean Checkbox
Phone	Single Line Text Input
Tax ID	Single Line Text Input
Percent	Single Line Text Input
String Enumeration	Single Select Drop Down

PC Field – Data Type	Palette Question – Control Type
Integer Enumeration	Single Select Drop Down
Decimal Enumeration	Single Select Drop Down

Labeled Check Box – A labeled checkbox allows you to enter a question and a label for the response field. Users can select the check box if needed. You also can create a multi labeled checkbox that allows you to enter labels for as many response fields as you need. Multiple choices can be selected with the multi label check box option. Every field would be open for selection unless limited by conditional display or answer map. Multiline checkboxes require an <A/> answer map. A name and a value are required.

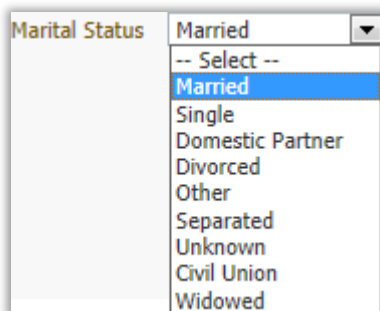
Check box selections can be changed and removed. If an item has been selected, it also can be unselected.

For Example



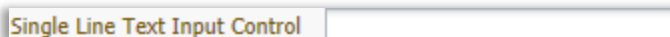
Single Select Drop Down – A single select drop down allows the user to select one option from a drop down list. The default number of visible response rows is 3. If you require more than three rows, you must enter the value in Response Rows field. The maximum number of visible rows is 25. Single select drop down requires an <A/> answer map.

For Example



Single Line Text Input – A single line text input field allows the user to Enter a single line of text. It is recommended that you limit the number of characters in the answer field by using an appropriate answer map. Other properties of the text field can be further defined in the answer map.

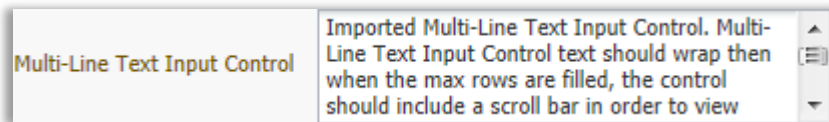
For Example



Multi Line Text Input – A multiple line text input field allows the user to Enter multiple lines of text. The default number of visible response rows is 3. If you require more than three rows, you must enter the value in Response Rows field. The maximum number of visible rows is 25. It is recommended that you limit the number of characters in the answer field by using an appropriate

answer map. The properties of the text field can be further defined in the Answer Map.

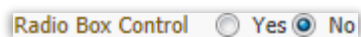
For Example



Radio Box – A radio box control type allows users to select the option they want. Further action could be determined by the condition display field or by an answer map. Once an answer has been selected, it can be changed but not de-selected. Only one selection is allowed on a radio control. Requires an <A/> answer map. The answer options will be presented horizontally.

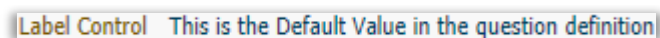
Once an answer has been selected, it can be changed but not de-selected. Only one selection is allowed on a radio control.

For Example



Label – A label field allows you to place a function on to the response field such as a default value or a value lookup. A label cannot be edited. It is populated through various means.

For Example



Hidden Constant – A hidden constant is a field that will not be seen on the questionnaire and triggers other questions or holds answers to be sent to other systems.

When using with a hidden constant, different functionality may apply. The answer can be captured without being displayed. If you do not want a hidden constant to be answered, you must enter a value into the display condition.

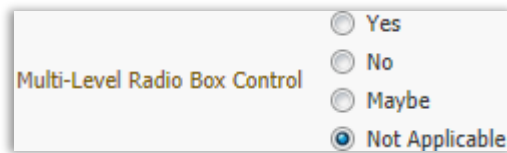
The actions or function related to a hidden constant always occur unless its display condition is not met.

It is recommended that you do not set a hidden constant question to be required.

Multi Level Radio Box – A multi level radio box allows users to select the option they want from a list of options. Further action could be determined by the condition display field or by an answer map. Requires an <A/> answer map.

Once an answer has been selected, it can be changed but not de-selected. Only one selection is allowed on a radio control.

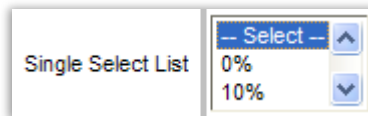
Multi level radio box will be displayed in vertically.

For Example


Multi-Level Radio Box Control

Yes
 No
 Maybe
 Not Applicable

Single Select List – A single select list allows users to select one option from a list that they can scroll through. The default number of visible response rows is 3. If you require more than three rows, you must enter the value in Response Rows field. The maximum number of visible rows is 25.

For Example


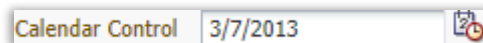
Single Select List

-- Select --

0%

10%

Calendar – A calendar control will place a calendar icon next to the entry field. Users can click the icon to pull up a calendar where the date can be selected.

For Example


Calendar Control

3/7/2013

Secure Text Input – A secure text input field allows users to enter text in a secure manner. Text would be masked on the display side to ensure privacy.

For Example


Secure Text Input

.....

Sub Form – This allows you to have two object types on the same form by creating a sub-form.

Summary Table – Allows for the creation of multiple instances of an object either automatically or manually.

A risk instance table is a way for you to create and display multiple instances of an object. For example, if you would like more than one vehicle to be insured.

Risk instances are displayed “read-only” in the summary table. Details must be entered on a separate form.

Edit Table – Allows for the creation of multiple instances of an object either automatically or manually.

Edit table allows you to edit the details in the table.

Sub Form Table – Allows for the creation of multiple instances of an object either automatically or manually.

Allows you to create multiple instances of a different object type that is editable.

Report Panel – Displays results from a callout or HTML formatted answer map data. Required to create a report display answer map question behavior.

Requires a 'Report Display' Answer Map question behavior.

EDITING

Any question can be edited at any time.

To Edit:

1. Open the **product** where you want to edit a question.
2. Select the **questionnaire** where you want to work. Click **Open**.
3. Select **Questions** on the top bar menu. This will open the Manage Questions screen.
4. Click the **edit icon** in front of the question you want to edit. This will open the Edit Question screen where you can make any edits to the question.

ORACLE Insurance Data Capture Palette Version: 05.02.00

Products | Questionnaire | Risk Objects | Tabs | Question Groups | Questions | Releases | Workbench | Help

Product - Sample Product 09 Version 1 | Questionnaire: SampleQuestionnaire1

Edit Question - VALADate

General Info | Answer Display Format | Control Properties | Behaviors | Display Condition | Help Text

ID	7302
Question Type	Parent/Trigger *
Risk Object	PCFeatures.PCValidations <input type="button" value="Select"/>
Risk Object Field	<input type="button" value="Select"/>
Data Type	Date
Control Type	Calendar *
Mapping ID	VALADate
Parent Question ID	<input type="text"/>
Child Question Sequence #	<input type="text"/>
Text	Value A Date *
Required	<input type="checkbox"/> This question requires an answer
Default Value	<input type="text"/>

Copyright © 2014 Oracle Corporation. All rights reserved.

Figure 64 Updating a Question

5. Make any necessary changes.
6. Click **Update** to save your changes.
7. If you are finished, click **Cancel** to return to the Manage Questions screen.

COPYING QUESTIONS

Any question can be copied at any time. When you copy a question, everything except the system issued ID number will be copied. No confirmation or error dialogue will be displayed when you copy a question.

To Copy a Question:

1. Open the **product** where you want to copy a question.
2. Select the **questionnaire** where you want to work. Click **Open**.
3. Select **Questions** on the top bar menu. This will open the Manage Questions screen.
4. Click the **copy icon** in front of the question you want to copy.
5. On the page listing at the bottom of the screen, click the last page.
6. The newly copied question will be the last question on the list. It will be identical to the original question except for the ID. This question is open for editing and use.

DELETING

You can delete any question at any time. Questions that are in use can be deleted. The question will not be removed from Worksite until the release has been published.

Deletes will not affect the product configuration field from which the question was created, and if the product is re-published to Palette, the question will be re-created. Please make sure this is the action you want to take. You cannot undo a delete.

To Delete:

1. Open the **product** where you want to delete a question.
2. Select the **questionnaire** where you want to work. Click **Open**.
3. Select **Questions** on the top bar menu. This will open the Manage Questions screen.
4. Click the **edit icon** in front of the question you want to edit. This will open the Edit Question screen where you can delete the question.

ORACLE Insurance Data Capture Palette Version: 05.02.00

Products | Questionnaire | Risk Objects | Tabs | Question Groups | Questions | Releases | Workbench | Help

Product - Sample Product 09 Version 1 | Questionnaire: SampleQuestionnaire1

Edit Question - ListOfValuesInteger

General Info | Answer Display Format | Control Properties | Behaviors | Display Condition | Help Text

ID	7301
Question Type	Simple *
Risk Object	Product09.PCFeatures.PCValidations <input type="button" value="Select"/>
Risk Object Field	ListOfValuesInteger <input type="button" value="Select"/>
Data Type	Integer Enumeration
Control Type	Single Select List *
Mapping ID	VALA
Parent Question ID	<input type="text"/>
Child Question Sequence #	<input type="text"/>
Text	Values for A *
Required	<input checked="" type="checkbox"/> This question requires an answer
Default Value	1

Copyright © 2014 Oracle Corporation. All rights reserved.

Figure 65 Deleting a Question

- Click **Delete**. A Confirmation message will be displayed.

Confirmation Required

Are you sure you want to delete this question?

This will automatically disconnect the question from any groups and rule inputs.

Figure 66 Delete Confirmation

- Click **OK** to delete the question. The screen will refresh and you will be placed on the Manage Questions screen. Your question will no longer be listed.

TIP: If you are unsure or this is not the action you want to take, click **Cancel**.

Questions in Worksite

Questions will behave as you have directed in your questions and answer maps. When to display, the type of answer that is expected, help text, etc.

Question will be in the assigned question group on the assigned tab with the assigned risk item.

The screenshot displays the Oracle Insurance Data Capture Workbench interface. At the top, the header shows 'ORACLE Insurance Data Capture' and user information: 'User: ad_user1 | Role: AdminRole | Team: DEVTest | Logout'. Below the header, the breadcrumb 'Workbench > Project' is visible. The main content area is titled 'Abigail Abbington' and contains a 'Questionnaire' section. The 'Insured Info' tab is active, showing a form for 'Insured Personal Information'. A red box highlights the following fields: First Name (Abigail), Middle Name (A), Last Name (Abbington), Gender (Female), Date of Birth (04/14/1974), Marital Status (Married), Age (39), Occupation (Analyst), and Opt Out (Do Not Solicit) (checked). Navigation buttons '<< Back' and 'Next >>' are located at the bottom of the form.

Figure 67 Questions in Worksite

RELEASES

The Releases screen is where you manage releases. Releases are the compilation of your entries for the Product, Questionnaire, Tabs, Question Groups, and Questions that you created. When you are ready to distribute to the questionnaire, you will create a Release. Creating a release is the final step in Palette. After the release has been created, you must enter Worksite and apply the release.

The Releases menu option will not be visible until you select the questionnaire where you want to work. Releases are unique to the questionnaire where they were created

All releases must be created. There are no default releases.

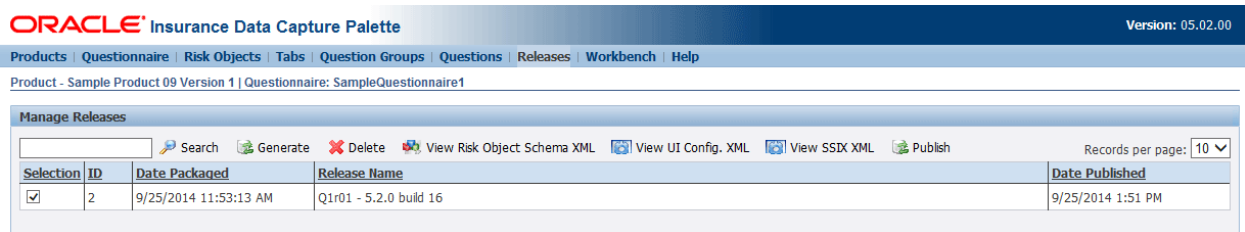


Figure 68 Releases

FIELDS

There are five fields on the main Releases tab.

- **Selection** - Check this box to select a Release.








- **ID** - A system generated ID number. This is an information only field and cannot be changed.
- **Date Packaged** - The date and time stamp for when this release was generated.
- **Release Name** - The name of the release. This is a user defined field limited to 200 characters, including spaces. Special characters are allowed.
- **Date Published** - the date of the last publication.

TIP: Multiple releases can be created per questionnaire. You may want to use a naming strategy that can help you to identify the release easily.

FUNCTIONALITY

All functionality is handled by selecting a release and clicking the option from the tool bar menu. There are no right click menus.

Menu Options:

 Search	Searches release properties for the criteria that have been entered.
 Generate	Generates a new Release.
 Delete	Deletes the selected Release.
 View Risk Category Schema	Displays the risk object schema for the selected Release.
 View UI Config. XML	Displays the UI configuration XML for the selected Release.
 View SSIX XML	Displays the SSIX XML for the selected Release
 Publish	Publishes a release to Worksite database.

GENERATE

A new release can be generated at any time. Releases should be generated any time changes have been made to a questionnaire that apply to Worksite.

The screenshot shows the Oracle Insurance Data Capture Palette interface. At the top, the title bar reads "ORACLE Insurance Data Capture Palette" and "Version: 05.02.00". Below the title bar is a navigation menu with items: Products, Questionnaire, Risk Objects, Tabs, Question Groups, Questions, Releases, Workbench, and Help. The main content area shows "Product - Sample Product 09 Version 1 | Questionnaire: SampleQuestionnaire1". A "Release Generation" dialog box is open, containing a "Release Label" text input field with a red asterisk, a "Date" field with the value "10/16/2014", and two buttons: "Generate" (highlighted with a red box) and "Cancel".

Figure 69 Generating a Release

1. On the Manage Releases screen, click **Generate**. This brings up the Release Generation screen.
2. Enter the **Release Label**.
3. Click **Generate**.

If your release was generated, it will be listed on the Manage Releases screen and you will receive a success message.

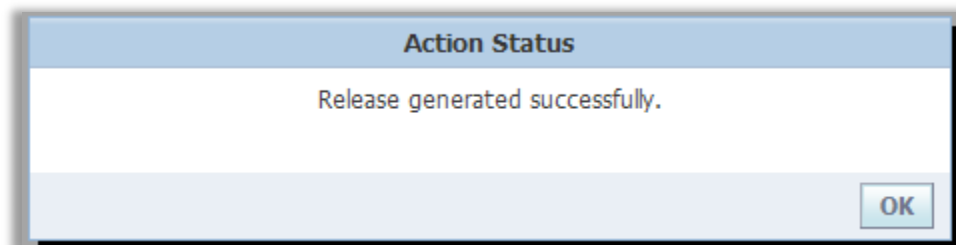


Figure 70 Successfully Generated Release

If there was an error in your release, an error message will be displayed. Please correct and try again.

DELETE

Releases can be deleted at any time. Please make sure this is the action you want to take. This is a permanent action.

1. On the Manage Releases screen, click **Delete**. A Confirmation screen will be displayed.
2. Click **OK** to delete the release. Click **Cancel** if this is not the action you want to take.

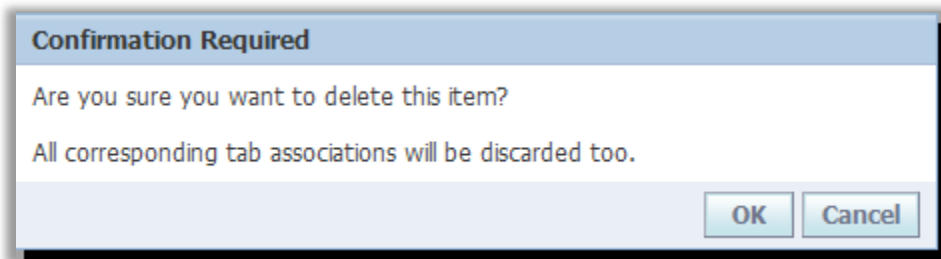


Figure 71 Deleting a Release

3. You will be returned to the Manage Releases screen. Deleted releases are removed immediately.

PUBLISH

The publish option will be available for any generated release. Publish will push the release to the Worksite environment. Releases are published one at a time and can be published more than once. Published releases can be deleted if they are no longer needed.

The screenshot shows the Oracle Insurance Data Capture Palette interface. At the top, the title is "ORACLE Insurance Data Capture Palette" and the version is "05.02.00". The navigation menu includes "Products", "Questionnaire", "Risk Objects", "Tabs", "Question Groups", "Questions", "Releases", "Workbench", and "Help". The current page is "Product - Sample Product 09 Version 1 | Questionnaire: SampleQuestionnaire1".

The "Manage Releases" section contains a search bar and several action buttons: "Search", "Generate", "Delete", "View Risk Object Schema XML", "View UI Config. XML", "View SSIX XML", and "Publish". The "Publish" button is highlighted with a red box.

Below the buttons is a table with the following data:

Selection	ID	Date Packaged	Release Name	Date Published
<input checked="" type="checkbox"/>	2	9/25/2014 11:53:13 AM	Q1r01 - 5.2.0 build 16	10/16/2014 2:44 PM

Records per page: 10

Copyright © 2014 Oracle Corporation. All rights reserved.

Figure 72 Publishing a Release

To Publish a Release:

1. On the main Releases tab, select the release you want to publish.
2. Click the **Publish** icon.
3. The screen will refresh with a success or fail message. If there are any failures, please correct and try again.

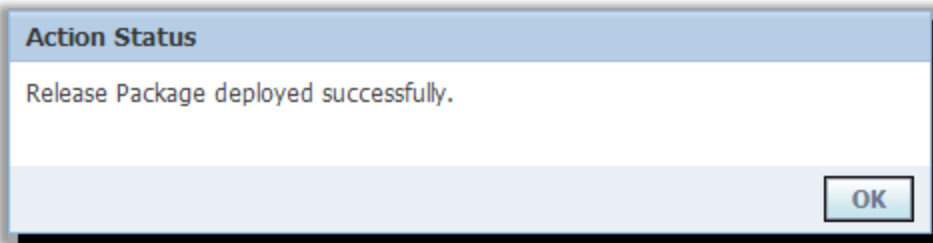
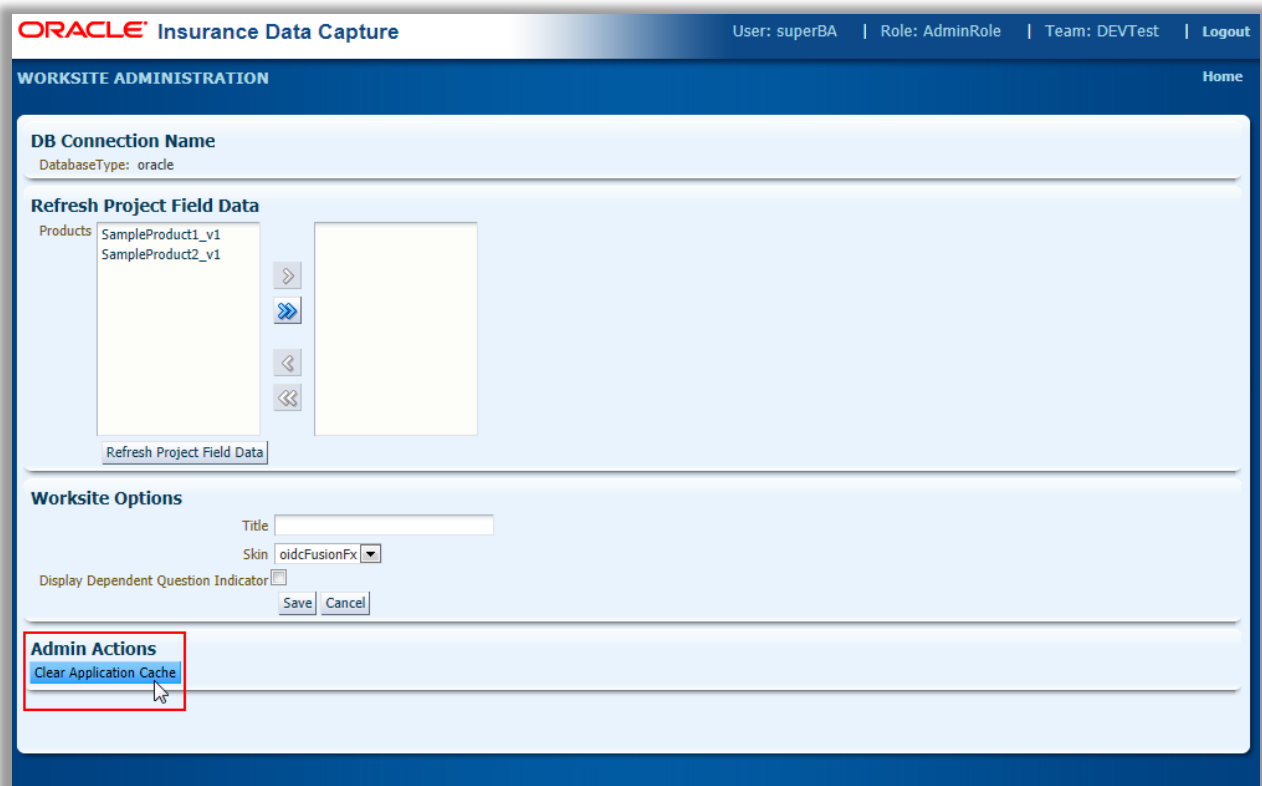


Figure 73 Successful Published Release

4. Click OK to close the message.
5. If the release was successfully deployed, clear the application cache under Admin Actions on the Worksite Administration page. This will allow the published release to be used in Worksite.



Alternatively, the WebLogic instance where OIDC Worksite is deployed can be to be stopped and re-started to allow the published release to be used in Worksite.

VIEW RISK OBJECT SCHEMA XML

The View Risk Object Schema XML is the risk object information for each risk object used in the questionnaire in XML format. The risk object schema information presented here is the same information you will find on each individual risk on the Risk Object tab. The advantage to the View Risk Object Schema XML is that the information is presented as a detailed list of only the risk objects used in the questionnaire. If you wanted this same information on the Risk Objects tab, you would need to view each risk object separately. Also, the Risk Objects tab presents every risk object available to the questionnaire, not just the ones being used.

You can view the risk object schema at any time. Viewing the risk object schema is helpful when you want to make adjustments to your questionnaire and you want to view a summary of the risk object schema information used in the questionnaire.

1. Select a single release where you want to view the risk object schema.
2. Click View Risk Object Schema XML. A separate window will be displayed.

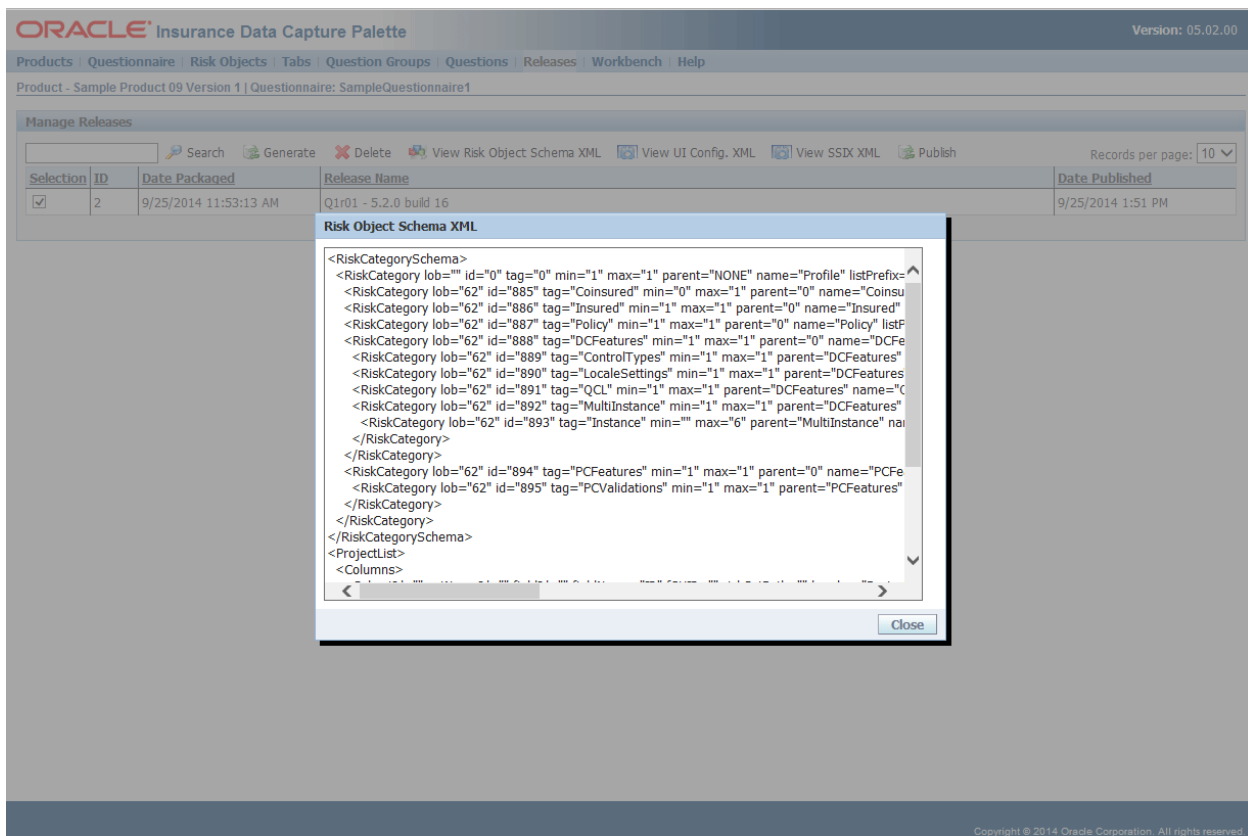


Figure 74 Risk Object Schema

This is an information only screen. You cannot edit on this screen but you can copy content and paste in to another program to view.

Click Close to close the screen and return to the Manage Release screen.

VIEW UI CONFIG XML

The View UI Config XML contains the definition of the questionnaire in XML format. The information presented here is the same information you will find for each individual element; Product, Risk Objects, Tabs, Question Groups, Questions and Answer Maps, that define the questionnaire. The advantage to the View UI Config XML is that the information is presented as a detailed listing of only the elements used in the questionnaire. If you wanted this same information from all the other tabs, you would need to view each element on each tab. Also, the tabs will present every element available to the questionnaire, not just the ones being used. The View UI Config XML is faster and more efficient way to view the element details of the questionnaire.

You can view the UI configuration information at any time. Viewing the UI Config XML is helpful when you want to make adjustments to your questionnaire and you want to view all the questionnaire information at one time.

1. Select a single release where you want to view the UI Configuration.
2. Click View UI Config XML. A separate window will be displayed.

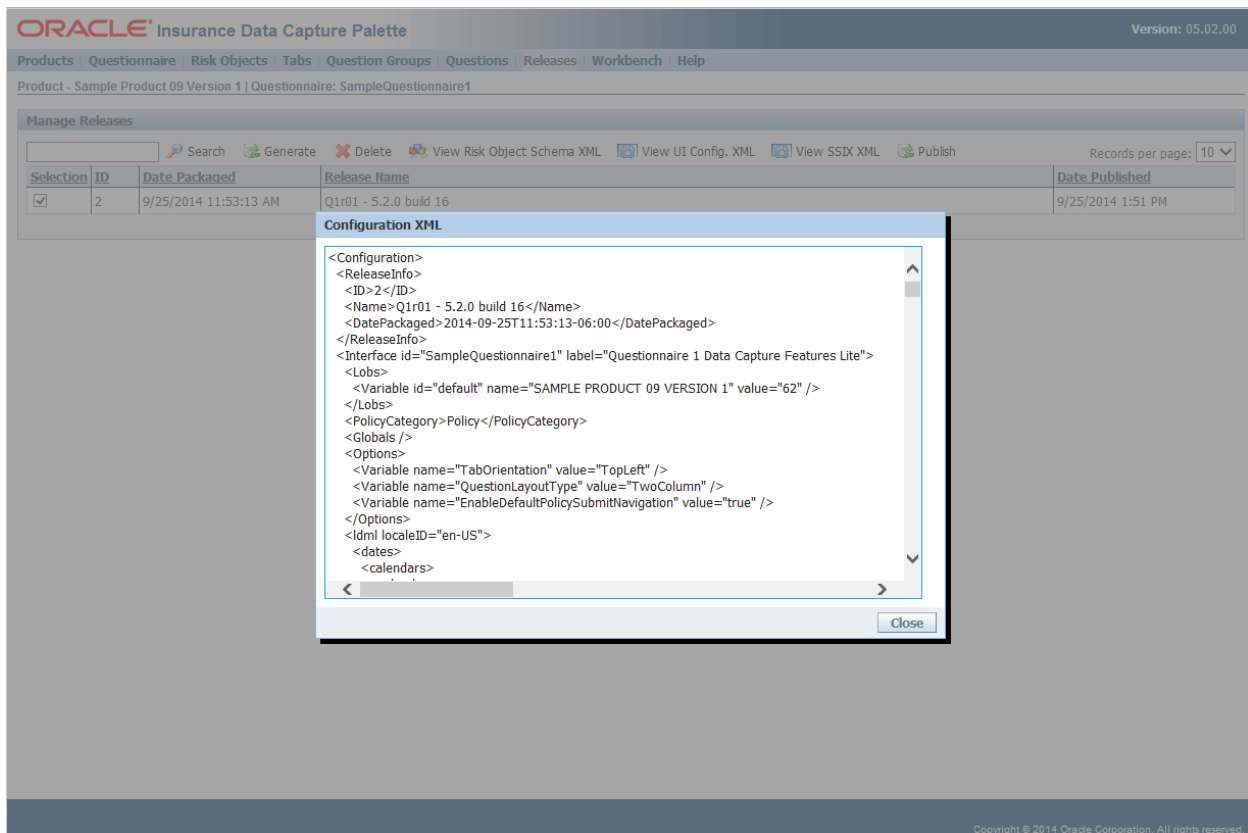


Figure 75 UI Config XML

This is an information only screen. You cannot edit on this screen but you can copy content and paste in to another program to view.

Click Close to close the screen and return to the Manage Release screen.

VIEW SSIX XML

SSIX, Software Services Integration XML, is a listing of the risk objects and inputs used in the questionnaire. This is a unique view into the document used or produced by Worksite that is useful when you want to plan import/export mapping as well as when you want to validate your business data model.

The SSIX XML also may be useful to help debug Worksite issues.

You can view the SSIX information at any time.

1. Select a single release where you want to view the SSIX information.
2. Click View SSIX XML. A separate window will be displayed.

The screenshot shows the Oracle Insurance Data Capture Palette interface. The 'Manage Releases' section contains a table with the following data:

Selection	ID	Date Packaged	Release Name	Date Published
<input checked="" type="checkbox"/>	2	9/25/2014 11:53:13 AM	Q1r01 - 5.2.0 build 16	9/25/2014 1:51 PM

The 'View SSIX XML' dialog box is open, displaying the following XML content:

```
<Product xmlns="http://oracle.com/insurance/ProductConfiguration">
  <Categories>
  <Coinsured id="" d="">
  <Fields>
  <FirstName>
  <Value />
  <DispValue />
  <OriginalValue />
  </FirstName>
  <MiddleName>
  <Value />
  <DispValue />
  <OriginalValue />
  </MiddleName>
  <LastName>
  <Value />
  <DispValue />
  <OriginalValue />
  </LastName>
  <GenderCd>
```

Figure 76 SSIX Sample XML

This is an information only screen. You cannot edit on this screen but you can copy content and paste in to another program to view.

Click **Close** to close the screen and return to the Manage Release screen.

WORKBENCH

The Workbench tab is where you can manage the columns that you want displayed and made available for searching on the Worksite Home page Project List.

A single worksite may contain multiple products and questionnaires. The initial view of the workbench project list displays the default columns that are available to all products. The default columns are:

- Project ID - a system-generated project ID
- Modified Date - the date the project was last updated
- Status - the current status of the project
- Group Name - the group under which the project was created

Palette allows you to define additional columns to be included in the Project List for each product.

A Release must be generated and published to include the Project List definition in the worksite.

The screenshot shows the Oracle Insurance Data Capture Palette interface. At the top, it says "ORACLE Insurance Data Capture Palette" and "Version: 05.02.00". Below that is a navigation menu with items: Products, Questionnaire, Risk Objects, Tabs, Question Groups, Questions, Releases, Workbench, and Help. The current page is "Product - Sample Product 09 Version 1 | Questionnaire: SampleQuestionnaire1". The main content area is titled "Manage Project Lists" and contains a "Column Assignment" section. There is a link to "Add New Column". Below this is a table with the following columns: Edit, Column Name, Field Name, Display, Risk Object, and System. The table contains seven rows of data.

Edit	Column Name	Field Name	Display	Risk Object	System
	Project ID	ID	Visible		Yes
	First Name	FirstName	Visible	Product09.Insured	No
	Last Name	LastName	Visible	Product09.Insured	No
	Status	STATUS	Visible		Yes
	Modified Date	MODIFIED_TS	Visible		Yes
	Parent	PARENT	Visible		Yes
	Group Name	GROUPNAME	Visible		Yes

Figure 77 Workbench, Project List

FIELDS


There are seven fields on the main Releases tab.

- **Edit** - Check this box to select a Release
- **Column Name** - The label that is displayed in the worksite column heading
- **Field Name** - The Risk Object Field or Mapping ID of the question that is used in this project list column
- **Display** - The type of display that applies to this column.
- **Risk Object** - The Risk Object of the question that is used in this project list column.
- **System** - Indicates whether this is a system-defined default project list column.
- **Re-order** - an icon that allows you to drag and drop an item to re-order its place in the Project List.



FUNCTIONALITY

All functionality is handled by selecting the option from the tool bar menu. There are no right click menus.

Menu Options:

 Add New Column	Adds a new column to the Project List definition.
--	---

There are two icons in the Manage Project List Column Assignment area:

 Edit	Edit - Allows you to edit the selected Column.
	Order - Allows you to drop and drag the Column to the position you want.

ADD NEW COLUMN

A new column can be added at any time.

1. On the Manage Project Lists page, click the **Add New Column** icon.

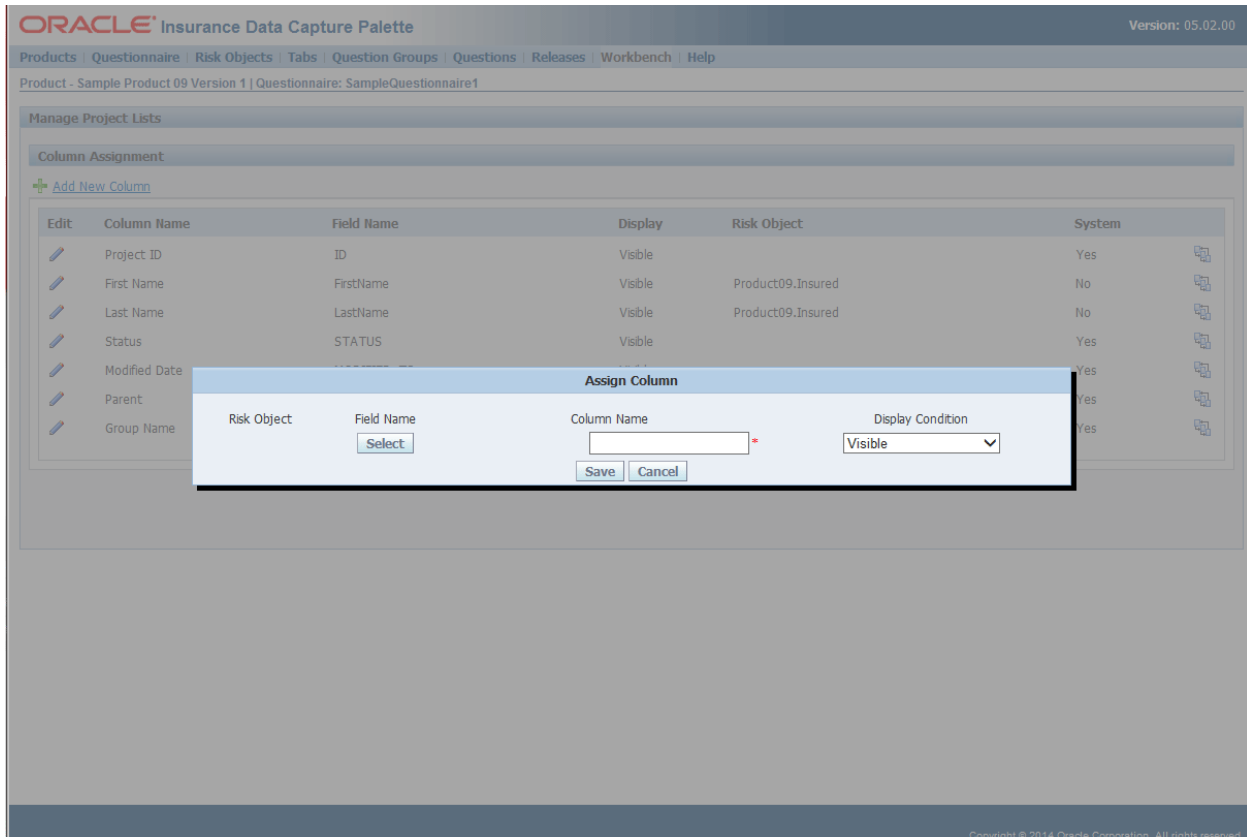


Figure 78 Adding New Column to Project List

2. Select a Field Name. The available options are listed in a separate screen. Select the field you want and click OK.

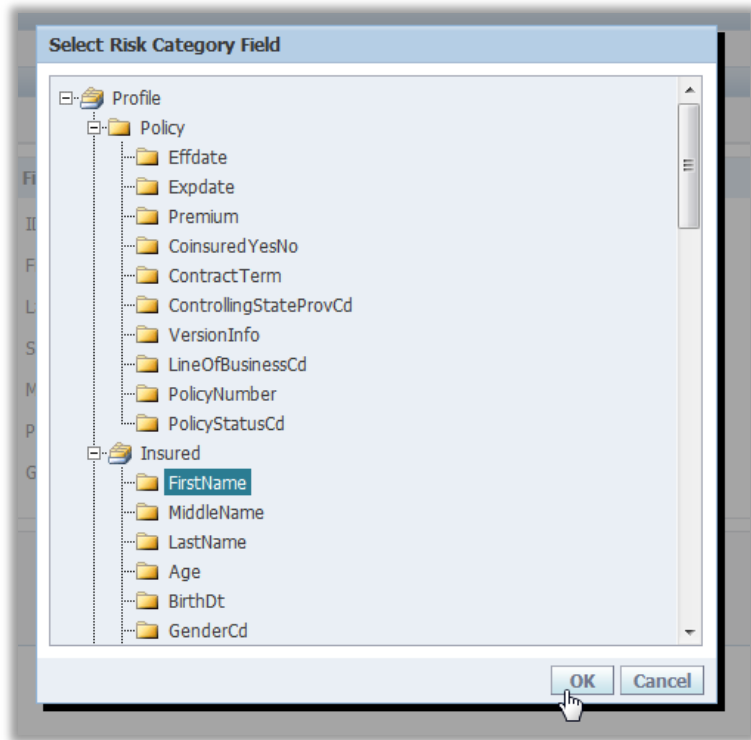


Figure 79 Selecting Risk Object Field

3. Enter a Column Name.
4. Select a Display Condition.
5. Click **Save**.
6. The screen will refresh and the new column will be added to the bottom of the list.

To Edit Risk Objects:

1. Click the Edit. icon for the column you want to edit The screen will refresh and the column definition dialog will open.
2. Make your changes. Options will depend upon the type of risk object selected.
3. Click **Update** to save changes.

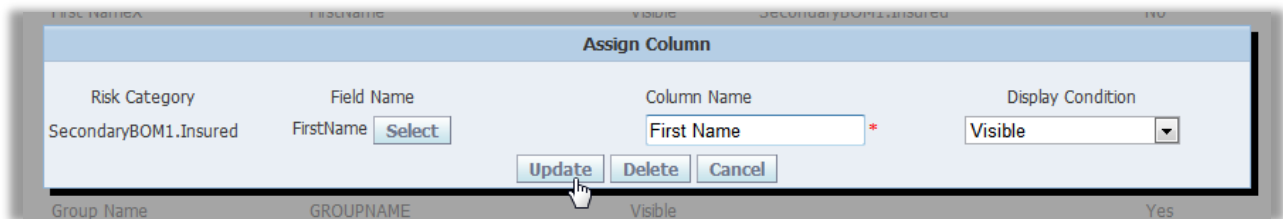


Figure 80 Editing a Risk Object in Project List

To Reorder Columns:

Reordering columns will allow you to place the columns in the order you want them to appear in Worksite. To reorder a column

1. Click on the Order icon for the column you want to move.
2. Drag the mouse cursor to the position you want.
3. Click the mouse button to drop the column in its new position.

Edit	Column Name	Field Name	Display	Risk Category	System
	Project ID	ID	Visible		Yes
	SecondaryBOM1.Insured	...
	First Name	FirstName	Visible	SecondaryBOM1.Insured	No
	Status	STATUS	Visible		Yes
	Modified Date	MODIFIED_TS	Visible		Yes

Figure 81 Re-ordering Columns in Project List

WORKSITE

To access Worksite:

Open an Internet Explorer web browser either remotely on the local OIDC web server and browse to the following location, replacing SERVERNAME with the actual server name:

<http://SERVERNAME:7001/DCW52/faces/LoginPage.jspx>

The port number may be updated by the installer/system administrator.

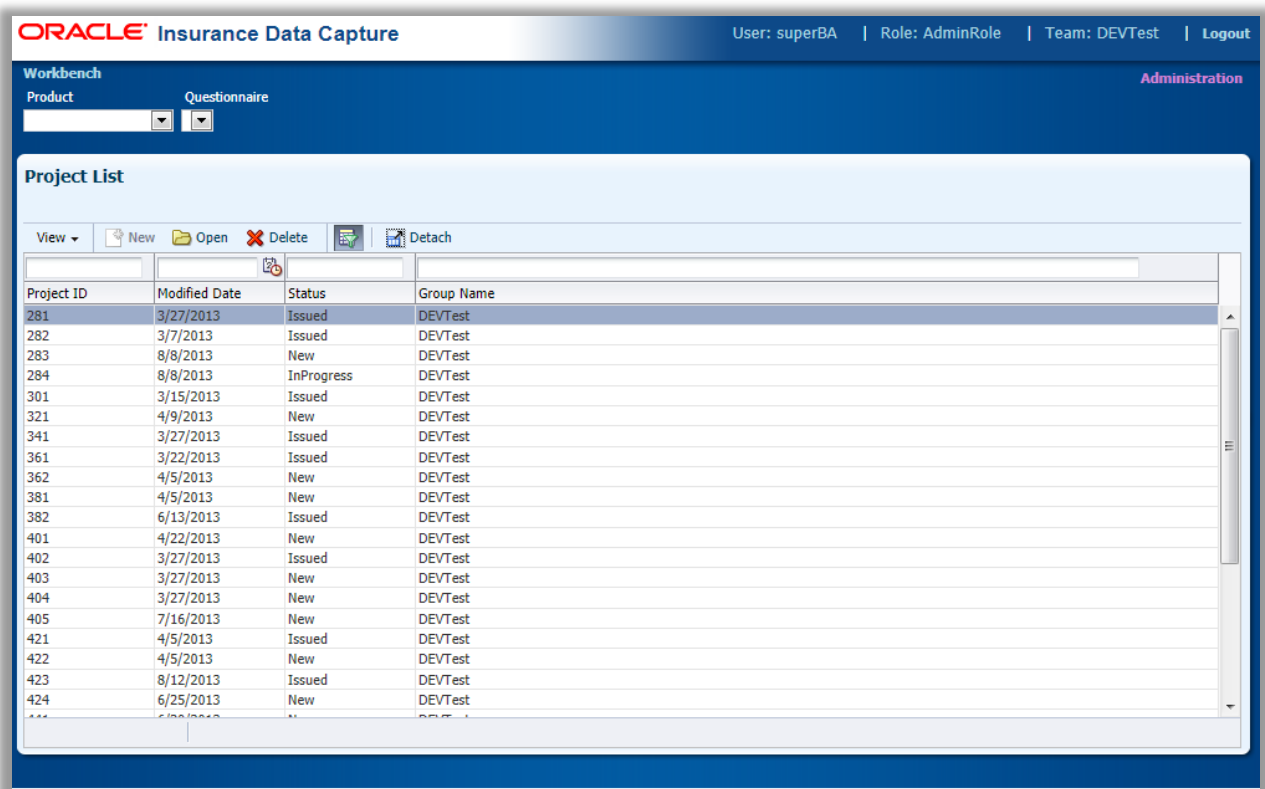


Figure 82 Data Capture Worksite Home

The screenshot shows the Oracle Insurance Data Capture Workbench interface. At the top, the Oracle logo and 'Insurance Data Capture' are displayed. The user information 'User: superBA | Role: AdminRole | Team: DEVTest | Logout' is visible in the top right. Below the header, there are dropdown menus for 'Product' (SampleProduct1_v1) and 'Questionnaire' (SampleQuestionnaire1). The main area is titled 'Project List' and contains a table with the following data:

Project ID	First Name	Last Name	Status	Modified Date	Group Name
281	Abigail	Abbington	Issued	3/27/2013	DEVTest
282	Bertand	Barnard	Issued	3/7/2013	DEVTest
381	Collin	Collier	New	4/5/2013	DEVTest
401	David	Davidson	New	4/22/2013	DEVTest
402	Edward	Eddington	Issued	3/27/2013	DEVTest
403	Ferris	Ferdinan	New	3/27/2013	DEVTest
421	George	Georgian	Issued	4/5/2013	DEVTest
422	Honor	Harrington	New	4/5/2013	DEVTest
441	Ivar	Iverson	New	6/20/2013	DEVTest
442	Jerry	Jameson	Issued	4/9/2013	DEVTest
463	Kelvin	Kevlar	New	8/12/2013	DEVTest
481	Liam	Larsen	New	10/24/2013	DEVTest
482	Kyle	Karem	Issued	8/28/2013	DEVTest

Figure 83 Data Capture Worksite Home, Product & Questionnaire Selected

CONTACTING SUPPORT

If you need assistance with an Oracle Insurance Data Capture System product, please log a Service Request using My Oracle Support at <https://support.oracle.com/>.

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Address any additional inquiries to:

Oracle Corporation
World Headquarters
500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.

Worldwide Inquiries:
Phone: +1.650.506.7000
Fax: +1.650.506.7200
oracle.com

GLOSSARY TERMS

KEY: Term [Previous Term, if any] | Definition

A	Activity	A well known, pre-defined business process between Data Capture and an external system.
	Answer Map	A set of instructions in XML format that controls the behavior of a question response such as providing a list of valid options, restricting values and/or formats.
C	Callout	The ability to generically connect to an external data source through one or more ESBs (Enterprise Service Busses).
	Configuration XML	Created in OIDC Palette when a Release is generated, the Configuration XML defines the questionnaire Properties, Globals, Options, Page Navigation, Locale Settings, Risk Object Schema Overrides, Quote Project Tabs, and Forms.
	Control Type	Determines the expected response to a question (such as an editable text box, a dropdown list, a non-editable label, etc.).
D	Dependent Question	A question that relies on another (Trigger) questions value.
	Designer	A person using Data Capture Palette to define a Work Site.
E	Engine	Data Capture installed components and back-end processes that are transparent to use.
	ESB	Enterprise Service Bus.
F	Form	The association of a risk object to a tab.
G	Globalization	When applied to software engineering is an all encompassing word that describes the act of making your product marketable in all regions of the world. It is often applied to a product that can work in many languages simultaneously and is sensitive to the end users cultural requirements.
	Globals	Questionnaire definition global variable that configure the location of application files.
I	Internationalization	The act of designing software so that it is generic enough allow specific language support to be almost plugged in. An internationalized product makes no assumptions about the language that it will operate in and is not usable without the addition of a language add-on; often abbreviated as I18N for the 18 letters between I and N.
L	Line of Business	A specific type of insurance, such as home, auto, life, commercial property, etc.

	Localization	The act of taking an internationalized product and making it usable by creating language add-ons. Translating the interface can be considered one important step in localizing a product; often abbreviated as L10N for the 10 letters between L and N.
O	OIDC	Oracle Insurance Data Capture.
	Options	Define the application settings, such as session timeout length and page validation.
P	Page Navigation	Questionnaire page navigation.
	Palette	Tool used to build content for the OIDC Work Site.
	Panel Question	Where we are currently using an Answer Map to define the look and feel of a question, such as tables and Sub-Forms.
	Project XML	An XML document that contains the data collected for a particular customer Profile and Project.
Q	Question	A description of the data being collected.
	Question Condition Language (QCL)	Statements used in a question's definition (Conditional Parent Value Display Condition) that control the behavior of the question.
	Question Group	A collection of one or more Questions that relate to a particular Risk Object.
	Question Type	Defines some question behavior.
	Questionnaire	The presentation of a Data Capture question set (Tabs, Question Groups, and Questions) to a user.
R	Release	Creates the schema and configuration files that define a Questionnaire.
	Risk Object	A Risk Object is a group of information that is specific to an item. For example, an auto policy would have objects of Policy, Driver and Vehicle. A home policy would have a Policy and Dwelling object.
	Risk Object Schema	Created in OIDC Palette when a Release is generated, the Risk Object Schema XML provides instructions to the Questionnaire about the objects available or required.
	Risk Object Instance	A specific instance of a Risk Object.
S	SSIX	Software Services Integration XML.
	Soft Data	Defines references an external sources (Insbridge SRP) for question answer values.
	Soft Service	A generic API that facilitates the transport of an XML doc to a target adaptor.
	Sub-Form	A panel question that allows users to deviate from the object currently in use

		in a specific form.
T	Target	A soft service end-point.
	Transformation	Converting a document from one format to another.
	Trigger Question	A question whose value affects another (Dependent) question (a.k.a., Initiating Question)
U	User	A Data Capture Work Site end-user.
W	Worksite	The presentation of a Data Capture interface - Questionnaire + Workbench - to a user (runtime user interface).
	Workbench	The presentation of a Data Capture Customer List and/or Quote List to a user.

QUESTION CONDITION LANGUAGE

Question Condition Language (QCL) is a statement that controls the behavior of a question or other questionnaire elements. QCL statements begin with the `^rx` literal, then an object reference and any defining properties, property values, operators and operator values.

QCL statements consist of:

`^rx <ValueLookup> <operator> <operatorValue>`

Where:

- `^rx` is a literal value that indicates a special process. `^rx` is followed by a space.
- **ValueLookup**
 - **Format:** `<object reference>.<property>.<propertyValue>`

Where:

- **<Object Reference>** is the object or instance that you are looking up, followed by a period (`.`).
- **<Property>** are the type of information you want to search for, followed by a period (`.`).
- **<Property Values>** the specific values you want from the property, followed by a space.
- **<Operators>** the differentiation function you want to perform, followed by a space.
- **<Operator Value>** the values you want to compare.

For Example:

- `^rx item.mld.VehicleMake eq XYZ`

Question Condition Language Usage

QCL is native to OI DC and used in Display Condition, Question Text and Answer Maps.

Using QCL allows OI DC to be reflexive in its presentation; if this happens, then do this. QCL has a defined structure but allows for wide variety of elements to be included.

- QCL statements are Case Sensitive.
- The parenthesis works mathematically, process what is in the parenthesis first then process outside.
- Most QCL statements will start with `^rx`. unless otherwise noted. `^rx` will be required when used in a Question as a Display Condition or Default Value.

- There are no mandatory elements. The structure and inclusion of elements depend upon the event or action that needs to take place.

Question Condition Language (QCL) statements are used in a question's definition to control the behavior of the question.

- **Simple Parent Question value condition**
 - When defining a 'child' question, the 'Display Condition' can be a simple value (example - the parent question's valid answer values are 'Yes' or 'No'; if the 'child' question should display when the parent question answer is 'Yes', the 'Display Condition' would simply be 'Yes')
- **Complex conditions**
 - Complex conditions can be defined by combining logical statements with comparison statements in nested bounded groupings. This provides a very wide range of condition checking flexibility to the use
- Case Sensitive

Display Condition QCL Statements

QCL statements consist of an object reference accompanied by the following (as applicable to the specific object)

^rx (literal, followed by a space) **Object**

Property

- Defines what type information to search for, such as an answer to a question or information about a specific risk instance (e.g., Insured)

Property Value

- The specific value(s) to search for
- Followed by a space

Operator

- Equal, not equal, greater than, etc
- Followed by a space

Operator Value

- The literal expected value (A,B,C,1,2,3) -- or --
- A condition (true, false)
- Followed by a space
- Special Character "/" cannot be used in value.

QCL Statement Examples

^rx object.property.propertyValue operator operatorValue

^rx item.mId.VehicleMake eq XYZ

Complex QCL Statement Examples

^rx pol.state.abbr in {CA,PA,TX} and pol.mId.EffectiveDt gt 01/01/2010

^rx (pol.state.abbr in {CA,PA,TX} and pol.mId.EffectiveDt gt 01/01/2010) or pol.mId.EffectiveDt gt 06/01/2013

VALUE LOOKUP

In a QCL statement, the ValueLookup follows the ^rx.

^rx **<ValueLookup>** <operator> <operatorValue>

The Value Lookup section of a QCL statement can consist of up to three parts, separated by a period (.):

<object reference>.<property>.<propertyValue>

You may use one, two or all three parts of the Value Lookup or not use the Value Lookup at all. It will depend upon the event or action that needs to take place.

Value Lookup may be used in other areas of the system where you need to lookup a system value.

<Object Reference>

Instances of various interface objects can be referenced in the QCL to lookup data. Objects are system defined such as screen data, project data, risk object instance data, and can be accessed. Object References can be used to access interface objects and their properties.

For example:

- pol = policy
- item = the current instance of a risk object
- insured = insured risk object
- screen = the tab you are on

Object references are not interchangeable and each has a specific meaning. For example, pol.mld.Address1 and item.mld.Address1 may result in the same answer but there are differences. Pol is looking for one specific object (the policy object instance) while item is looking for a different object (the current instance of any object, based on the form tab/object association).

Object Reference in QCL Structure:

In the QCL structure, object reference is the element that follows ^rx (space).

^rx **object**.property.propertyValue operator operatorValue

In the Value Lookup structure, object reference is the first element.

<object reference>.<property>.<propertyValue>

Object Reference Details:

There are 10 Object References available:

Object Reference	Object Definition
baseItem	Base Object Instance
cat.<objectName>**	Object Name**
coinsured	Coinsured
firstInstance	First Instance of Risk Object
insured	Insured
item	Risk Object Instance
parentItem	Parent Object Instance
parentVal***	Parent question value***
pol	Policy
prj	Project
Session	Session

NOTES:

**Object Name object reference (cat) creates an atypical QCL statement. That is, the object reference requires not only the literal reference value – “cat” (i.e., Object), it also requires the Object Name. When the ‘Object Name’ is selected, the QCL statement should include both the object reference and the <objectName> separated by a period (.).

A **firstInstance** is not allowed when the object is a singleton.

^rx object.<objectName>.property.propertyValue operator operatorValue

^rx cat.Person.mld.PersonInfo eq XYZ

*** Also, the Parent Question Value (parentVal) does not require/allow a property or property value, and can only be used in a child question.

^rx object operator operatorValue

^rx parentVal in {A,B,C}

Ctrl+Click the Object Reference to view details. Object reference properties are defined in Object Reference Property Definitions.

Object	Details	
baseItem	Description:	Represents any base risk object of the currently selected risk object instance. Can be any risk object type defined in the risk object schema. When a risk object extends another, the core object is its base. For example, a Driver may be an extension of Insured, or HouseholdMember and they are its base.
	Properties:	<ul style="list-style-type: none"> • mld.<mld> • object • baseCategory

		<ul style="list-style-type: none"> • isFirstOfKind • isLastOfKind • numberOfKind • maxNumberOfKind • numberOf<objectID> • isInsured • isCoInsured
	Examples:	baseltem.mld.QUOTE_STATE eq TX baseltem.isCoInsured neq true
cat.<objectName>	Description:	Provides access to singleton and first instance risk objects. It could be any risk object type defined in the risk object schema.
	Properties:	<ul style="list-style-type: none"> • mld.<mld>
	Examples:	cat.Policy.mld.AGE lt 16
coinsured	Description:	Provides access to the coinsured risk object instance.
	Properties:	<ul style="list-style-type: none"> • mld.<mld> • object
	Examples:	coinsured.mld.FIRST_NAME eq John coinsured.NumberOf.Person eq true
firstInstance	Description:	Provides access to the first risk object instance that is of the same type as the currently selected risk object. It could be any risk object type defined in the risk object schema.
	Properties:	<ul style="list-style-type: none"> • mld.<mld>
	Examples:	firstInstance.mld.VEHICLE_YEAR neq !Empty
insured	Description:	Provides access to the insured risk object instance.
	Properties:	<ul style="list-style-type: none"> • mld.<mld> • object
	Examples:	insured.mld.LAST_NAME eq Smith insured.isFirstOfKind eq true
item	Description:	Represents the current risk object instance. It could be any risk object type defined in the risk object schema.
	Properties:	<ul style="list-style-type: none"> • mld.<mld> • object • baseCategory • isFirstOfKind • isLastOfKind • numberOfKind

		<ul style="list-style-type: none"> • maxNumberOfKind • numberOf.<objectID> • isInsured • isCoInsured
	Examples:	item.mld.NUMBER_OF_ACCIDENTS gte 3 item.isInsured eq true
parentItem	Description:	Represents the parent risk object of the current risk object instance. It could be any risk object type defined in the risk object schema.
	Properties:	<ul style="list-style-type: none"> • mld.<mld>
	Example:	parentItem.mld.PersonInfo eq !Empty
parentVal	Description:	Value of the parent question. Used for child questions where you want a value other than a single literal “equals” to be the value for child conditions.
	Examples:	parentVal neq 16 parentVal lt
pol	Description:	Provides access to the policy risk object instance.
	Properties:	<ul style="list-style-type: none"> • mld.<mld> • numberOf.<objectID> • hasANY.<objectID>
	Example:	pol.numberOf.Vehicle gte 7 pol.hasAny.Vehicle eq true
prj	Description:	Provides access to the project details. Project is the top most level and contains information regarding the project that will not be located elsewhere such as Project Name and Line of Business.
	Properties:	<ul style="list-style-type: none"> • mld.<mld> • questionnaireName • status • numberOf.<objectID> • hasANY.<objectID> • tabGroupLayout • UserGroupID • UserName
	Examples:	prj.state.abbr eq 12 prj.questionnaireName eq MyQuestionnaire prj.leadId in {A,B,C} prj.status gt 7 prj.numberOf.Driver eq 5 prj.hasANY.Driver eq true

<i>session</i>	Description:	Provides session information.
	Properties:	<ul style="list-style-type: none">•
	Example:	

Object Reference Property Definitions

Object references properties are the properties that the object reference uses.

Property	Definition
appMode	Retrieves the current workflow based ApplicationMode value.
baseCategory	Retrives the current base object.
businessProcess	Retrieves the current workflow based BusinessProcess value.
objectName	Name defined in Palette.
hasANY.<objectID>	Returns true if the policy has any instance of the specified objectID. Returns false otherwise.
isColnsured	Returns true if the current risk object is the Coinsured risk object instance. Returns false otherwise.
isFirstOfKind	Returns true if the current risk object is the first of its type under its parent risk object. Returns false otherwise.
isInsured	Returns true if the current risk object is the Insured risk object instance. Returns false otherwise.
isLastOfKind	Returns true if the current risk object is the last of its type under its parent risk object. Returns false otherwise.
maxNumberOfKind	Returns the maximum number of allowed risk objects of the same type as the currently selected risk object.
mld.<mld>	Retrieves the answer stored for the identified risk object and question using the mapping ID <mld>.
numberOf.<objectID>	Returns the maximum number of allowed risk objects of the same type as the currently selected risk object.
numberOfKind	Returns the index (or position) of current risk object relative to the number of siblings of its type under its parent risk.
questionnaireName	Returns the questionnaire name.
screenID	Tab Name
state	Retrieves state values set by the SET_QUOTE_STATE answer map action. The state must be set prior to using.
status	Retrives the project status (New, InProgress, Rated, Prospect, or Issued).
UserGroupID	Returns the value of the current User Group ID selected for generating quotes in the current user session.
UserName	Returns the user name.

<Property>

The property defines what type information to search for, such as an answer to a question or information about a specific risk instance (e.g., Insured). If you used a Value Lookup, the property element will be required.

Property in QCL Structure:

In the QCL structure, property is the element that follows object.(period)

```
^rx object.property.propertyValue operator operatorValue
```

In the Value Lookup structure, property is the second element.

```
<object reference>.<property>.<propertyValue>
```

Property uses these values:

Object Property	QCL Object Property.<Value>	Description
Field	mId.<field>	retrieves the answer stored for the identified risk item and question using its mapping ID <mId>
Is Coinsured ****	isCoinsured ****	Returns "true" if the current risk item is the Coinsured risk item instance. Returns "false" otherwise.
Is First of Kind ****	isFirstOfKind ****	Returns "true" if the current risk item is the first of its type under its parent risk item. Returns "false" otherwise.
Is Insured ****	isInsured ****	Returns "true" if the current risk item is the Insured risk item instance. Returns "false" otherwise.
Is Last of Kind ****	isLastOfKind ****	Returns "true" if the current risk item is the last of its type under its parent risk item. Returns "false" otherwise.
Is Ordered ****	isOrdered ****	Returns "true" if the current risk item was created as a result of ordering a report from an external system. Returns "false" otherwise.
Is Question Created ****	isQuestionCreated ****	Returns "true" if the current risk item was created by answering a question (using the MANAGE_RISK_ITEM response map function). Returns "false" otherwise.
Number Of	numberOf	<objectName> Retrieves the count of the specified child or sibling object type
Base Object	baseCategory	Returns the base object name
Questionnaire Name	questionnaireName	Questionnaire Name
User Group ID	UserGroupID	Returns the User Group ID (number)
User Name	UserName	Returns the User Name
User Group	UserGroup	Returns User Group (name)
User Role	UserRole	Returns User Role

NOTES

**** The 'true/false' Object Properties (isCoInsured, isFirstOfKind, isInsured, isLastOfKind, isOrdered, isQuestionCreated) do not require/allow a property value.

isFirstOfKind is not allowed when the object reference is **firstInstance**.

isLastOfKind is not allowed when the object reference is **firstInstance**.

baseCategory is only available when the current object type is an extension.

^rx object.property operator operatorValue

^rx coinsured.isQuestionCreated eq true

^rx item.isLastOfKind eq true

^rx item.isInsured eq true

<PROPERTY VALUES>

Property values are the specific value(s) to search for. If the property is ans then its value is a question ID. If the property is an mld then its value is mapping ID. Properties valid values depend on the property itself. Property values are case sensitive. The value must match exactly.

Property Value in QCL Structure:

In the QCL structure, property value is the element that follows property.(period)

^rx object.property.propertyValue operator operatorValue

In the Value Lookup structure, propertyValue is the third element.

<object reference>.<property>.<propertyValue>

<OPERATORS>

QCL supports comparison and logical operators. Operators are lower case.

Operator in QCL Structure:

In the QCL structure, operator follows propertyValue (space).

^rx object.property.propertyValue operator operatorValue

- **Comparison Operators**

Operator Description	QCL Operator
equals	eq
not equal to	neq
in a set of values *****	in *****
not in a set of values *****	nin *****
less than	lt
less than or equal to	lte
greater than	gt
greater than or equal to	gte

- **Value Operators**

Operator Value	QCL Operator Value
True	true
False	false
Empty	_EMPTY replaces deprecated !Empty
Non Empty	_NON_EMPTY replaces deprecated !NonEmpty
Any Value	_ANY_VALUE replaces deprecated !AnyVal
Custom (or Literal)	<User-Defined>

<OPERATOR VALUES>

Operator values are followed by a space and the special character forward slash (/) cannot be used.

Operator Values in QCL Structure:

In the QCL structure, operator value follows operator (space).

```
^rx object.property.propertyValue operator operatorValue
```

Operator Values Can Be:

- A Literal Value ABC.
- A Set of Values with the set members enclosed in braces { } and separated by a comma. For example {a,b,c,d}.
- A Condition such as true or false.
- %_x_% means to process only when the exact content is matched, where _x_ is the value you want matched.
- !EMPTY means empty.
- !NonEmpty means that this must have a value.

- !AnyVal means empty or not empty.

QCL Rules:

- eq YES - Must match exactly including case and spacing.
- gte %0.50% - If you want to search for special characters you must use percent signs. Anything within the percent sign (%) will be treated exactly as entered, %value%.

Restricted Special Characters:

There is a short list of special characters that will not be allowed in any part of the system. If you attempt to use a restricted special character, you will receive an error message instructing you to change your entry.

Name	Symbol
Greater Than	>
Less Than	<
Apostrophe	'
Quotation Marks	"
Ampersand	&

Any other special character will be allowed.

QUESTION BEHAVIOR – FUNCTIONS

Details and examples for question behaviors – functions.

ADD_VALUES

ADD_VALUES	
Performs addition of values and returns their sum.	
<Arg/>	ATTRIBUTES:
addend	<p>REQUIRED: A value to be added to the sum. At least two ADDEND arguments are required.</p> <ul style="list-style-type: none"> • type - the argument type <ul style="list-style-type: none"> ▪ lkup – indicates the “value” attribute should be parsed and run as a lookup function, ▪ constant – indicates the “value” is a literal, constant • value - either a lookup reference or a literal, constant.
precision	<p>OPTIONAL: Causes the function result (sum) to be rounded to the specified number of decimal places. If precision is omitted, the sum is rounded to zero decimal places (integer).</p> <ul style="list-style-type: none"> • type - the argument type <ul style="list-style-type: none"> ▪ lkup – indicates the “value” attribute should be parsed and run as a lookup function, ▪ constant – indicates the “value” is a literal, constant • value - either a lookup reference or a literal, constant.
EXAMPLE	<pre><Func name="ADD_VALUES"> <Arg name="addend" type="lkup" value="cat.DCFeatures.mId.DecimalValue"/> <Arg name="addend" type="lkup" value="cat.DCFeatures.mId.IncrementDecimal"/> <Arg name="addend" type="constant" value="20.75"/> <Arg name="precision" type="constant" value="3"/> </Func></pre>

DIVIDE_VALUES

DIVIDE_VALUES	
Performs division of values and returns their quotient.	
<Arg/>	ATTRIBUTES:
dividend	<p>REQUIRED: The value to be divided</p> <ul style="list-style-type: none"> • type - the argument type <ul style="list-style-type: none"> ▪ lkup – indicates the “value” attribute should be parsed and run as a lookup function, ▪ constant – indicates the “value” is a literal, constant • value - either a lookup reference or a literal, constant.
divisor	<p>REQUIRED: The number to be divided by.</p> <ul style="list-style-type: none"> • type - the argument type <ul style="list-style-type: none"> ▪ lkup – indicates the “value” attribute should be parsed and run as a lookup function, ▪ constant – indicates the “value” is a literal, constant • value - either a lookup reference or a literal, constant.

precision	<p>OPTIONAL: Causes the function result to be rounded to the specified number of decimal places. If precision is omitted, the quotient is rounded to zero decimal places (integer).</p> <ul style="list-style-type: none"> • type - the argument type <ul style="list-style-type: none"> ▪ lkup – indicates the “value” attribute should be parsed and run as a lookup function, ▪ constant – indicates the “value” is a literal, constant • value - either a lookup reference or a literal, constant.
EXAMPLE	<pre><Func name="DIVIDE_VALUES"> <Arg name="dividend" type="lkup" value="cat.DCFeatures.mId.DecimalValue"/> <Arg name="divisor" type="lkup" value="cat.DCFeatures.mId.IncrementDecimal"/> <Arg name="precision" type="constant" value="4"/> </Func></pre>

MULTIPLY_VALUES

MULTIPLY_VALUES	
Performs multiplication of values and returns their product.	
<Arg/>	ATTRIBUTES:
factor	<p>REQUIRED: The number that is multiplied by the multiplier</p> <ul style="list-style-type: none"> • type - the argument type <ul style="list-style-type: none"> ▪ lkup – indicates the “value” attribute should be parsed and run as a lookup function, ▪ constant – indicates the “value” is a literal, constant • value - either a lookup reference or a literal, constant.
precision	<p>OPTIONAL: Causes the function result to be rounded to the specified number of decimal places. If precision is omitted, the product is is rounded to zero decimal places (integer).</p> <ul style="list-style-type: none"> • type - the argument type <ul style="list-style-type: none"> ▪ lkup – indicates the “value” attribute should be parsed and run as a lookup function, ▪ constant – indicates the “value” is a literal, constant • value - either a lookup reference or a literal, constant.
EXAMPLE	<pre><Func name="MULTIPLY_VALUES"> <Arg name="factor" type="lkup" value="cat.DCFeatures.mId.DecimalValue"/> <Arg name="factor" type="lkup" value="cat.DCFeatures.mId.IncrementDecimal"/> <Arg name="factor" type="constant" value="20.75"/> <Arg name="precision" type="constant" value="4"/> </Func></pre>

SUBTRACT_VALUES

SUBTRACT_VALUES	
Performs subtraction of values and returns their difference	
<Arg/>	ATTRIBUTES:

minuend	<p>REQUIRED: The number from which the subtrahend is deducted</p> <ul style="list-style-type: none"> • type - the argument type <ul style="list-style-type: none"> ▪ lkup – indicates the “value” attribute should be parsed and run as a lookup function, ▪ constant – indicates the “value” is a literal, constant • value - either a lookup reference or a literal, constant.
subtrahend	<p>REQUIRED: The number that is deducted from the minuend</p> <ul style="list-style-type: none"> • type - the argument type <ul style="list-style-type: none"> ▪ lkup – indicates the “value” attribute should be parsed and run as a lookup function, ▪ constant – indicates the “value” is a literal, constant • value - either a lookup reference or a literal, constant.
precision	<p>OPTIONAL: Causes the function result to be rounded to the specified number of decimal places. If precision is omitted, the difference is rounded to zero decimal places (integer)</p> <ul style="list-style-type: none"> • type - the argument type <ul style="list-style-type: none"> ▪ lkup – indicates the “value” attribute should be parsed and run as a lookup function, ▪ constant – indicates the “value” is a literal, constant • value - either a lookup reference or a literal, constant
EXAMPLE	<pre><Func name="SUBTRACT_VALUES"> <Arg name="minuend" type="lkup" value="cat.DCFeatures.mId.DecimalValue"/> <Arg name="subtrahend" type="lkup" value="cat.DCFeatures.mId.IncrementDecimal"/> <Arg name="precision" type="constant" value="1"/> </Func></pre>

ADD_CHILDVALUES

ADD_CHILDVALUES	
Sums values across all instances of the specified child object and field	
<Arg/>	ATTRIBUTES:
category	<p>REQUIRED: Identifies the risk object to search for. These items must be children of the current item</p> <ul style="list-style-type: none"> • value - required, object ID
mId	<p>REQUIRED: Identifies the field to search for</p> <ul style="list-style-type: none"> • value - required, Field name / Mapping ID
precision	<p>OPTIONAL: Causes the function result to be rounded to the specified number of decimal places. If precision is omitted, the difference is rounded to zero decimal places (integer)</p> <ul style="list-style-type: none"> • type - the argument type <ul style="list-style-type: none"> ▪ lkup – indicates the “value” attribute should be parsed and run as a lookup function, ▪ constant – indicates the “value” is a literal, constant • value - either a lookup reference or a literal, constant
EXAMPLE	<pre><Func name="ADD_CHILDVALUES"> <Arg name="category" value="Instance"/> <Arg name="mId" value="InstanceNumber"/> <Arg name="precision" type="constant" value="1"/> </Func></pre>

DATE_DIFFERENCE

DATE_DIFFERENCE	
Performs subtraction of date values and returns their difference as an integer. The expected date values must be in valid yyyy-MM-dd format	
<Arg/>	ATTRIBUTES:
enddate	<p>REQUIRED: The date from which the startdate is deducted</p> <ul style="list-style-type: none"> • type - the argument type <ul style="list-style-type: none"> ▪ lkup – indicates the “value” attribute should be parsed and run as a lookup function. The lookup result must be a valid date in yyyy-MM-dd format ▪ variable – indicates that the system will perform an internal function or calculation to obtain the date value. Valid values are: <ul style="list-style-type: none"> ○ _NOW_ – returns the current system date ▪ constant – indicates the “value” is a literal, constant date in yyyy-MM-dd format • value - either a lookup reference or a literal, constant, or a valid system function
startdate	<p>REQUIRED: The date that is deducted from the enddate</p> <ul style="list-style-type: none"> • type - the argument type <ul style="list-style-type: none"> ▪ lkup – indicates the “value” attribute should be parsed and run as a lookup function. The lookup result must be a valid date in yyyy-MM-dd format ▪ variable – indicates that the system will perform an internal function or calculation to obtain the date value. Valid values are: <ul style="list-style-type: none"> ○ _NOW_ – returns the current system date ▪ constant – indicates the “value” is a literal, constant date in yyyy-MM-dd format • value - either a lookup reference or a literal, constant, or a valid system function
precision	<p>REQUIRED: Causes the function result to be calculated as a specified integer value (number of days, weeks, months or years)</p> <ul style="list-style-type: none"> • type - the argument type <ul style="list-style-type: none"> ▪ lkup – indicates the “value” attribute should be parsed and run as a lookup function. The lookup result must be either <ul style="list-style-type: none"> ○ DAYS (365) ○ WEEKS (52) ○ MONTHS (12) ○ YEARS (1) ▪ constant – indicates the “value” attribute is a literal, constant. Valid values are: <ul style="list-style-type: none"> ○ DAYS (365) ○ WEEKS (52) ○ MONTHS (12) ○ YEARS (1) • value - either a lookup reference or a literal, constant
EXAMPLE	<pre><Func name="DATE_DIFFERENCE"> <Arg name="enddate" type="lkup" value="item.mId.BirthDate"/> <Arg name="startdate" type="lkup" value="pol.mId.EffectiveDate"/> <Arg name="precision" type="constant" value="YEARS"/> </Func></pre>

DATE_CALCULATION

DATE_CALCULATION	
Calculates and returns a date value from a start date the 'span' integer value	
<Arg/>	ATTRIBUTES:
function_type	<p>REQUIRED: Identifies the type of math function to build/use to set the calculated date value.</p> <ul style="list-style-type: none"> • value - the argument type <ul style="list-style-type: none"> ▪ add_values – performs addition of the values and returns the result as a date ▪ subtract_values - performs subtraction of the values and returns the result as a date
startdate	<p>REQUIRED: The date that is added to or deducted from the span</p> <ul style="list-style-type: none"> • type - the argument type <ul style="list-style-type: none"> ▪ lkup – indicates the “value” attribute should be parsed and run as a lookup function. The lookup result must be a valid date in yyyy-MM-dd format ▪ variable – indicates that the system will perform an internal function or calculation to obtain the date value. Valid values are: <ul style="list-style-type: none"> ○ _NOW_ – returns the current system date ▪ constant – indicates the “value” is a literal, constant date in yyyy-MM-dd format • value - either a lookup reference or a literal, constant, or a valid system function
span	<p>REQUIRED: The integer value that added to or deducted from startdate</p> <ul style="list-style-type: none"> • type - the argument type <ul style="list-style-type: none"> ▪ lkup – indicates the “value” attribute should be parsed and run as a lookup function. The lookup result must be a valid integer ▪ constant – indicates the “value” is a literal, constant integer • value - either a lookup reference or a literal, constant, or a valid system function
precision	<p>REQUIRED: Causes the function result to be calculated as a specified integer value (number of days, weeks, months or years)</p> <ul style="list-style-type: none"> • type - the argument type <ul style="list-style-type: none"> ▪ lkup – indicates the “value” attribute should be parsed and run as a lookup function. The lookup result must be either <ul style="list-style-type: none"> ○ DAYS (365) ○ WEEKS (52) ○ MONTHS (12) ○ YEARS (1) ▪ constant – indicates the “value” attribute is a literal, constant. Valid values are: <ul style="list-style-type: none"> ○ DAYS (365) ○ WEEKS (52) ○ MONTHS (12) ○ YEARS (1) • value - either a lookup reference or a literal, constant
EXAMPLE(s)	<pre><Func name="DATE_CALCULATION"> <Arg name="startdate" type="lkup" value="item.mId.EffectiveDate"/> <Arg name="span" type="lkup" value="item.mId.ContractTerm"/> <Arg name="function_type" value="add_values"/> </Func></pre>

```
<Arg name="precision" type="constant" value="MONTHS" />
</Func>
```

PERCENTAGE_OF

PERCENTAGE_OF	
Calculates and returns the percentage value of a specified number value.	
<Arg/>	ATTRIBUTES:
number	REQUIRED: The number for which the percentage value is calculated <ul style="list-style-type: none"> • type - the argument type <ul style="list-style-type: none"> ▪ lkup – indicates the “value” attribute should be parsed and run as a lookup function, ▪ constant – indicates the “value” is a literal, constant • value - either a lookup reference or a literal, constant.
percentage	REQUIRED: Specifies the percentage to be used in the calculation <ul style="list-style-type: none"> • type - the argument type <ul style="list-style-type: none"> ▪ lkup – indicates the “value” attribute should be parsed and run as a lookup function, ▪ constant – indicates the “value” is a literal, constant • value - either a lookup reference or a literal, constant.
precision	OPTIONAL: Causes the function result to be rounded to the specified number of decimal places. If precision is omitted, the product is rounded to zero decimal places (integer). <ul style="list-style-type: none"> • type - the argument type <ul style="list-style-type: none"> ▪ lkup – indicates the “value” attribute should be parsed and run as a lookup function, ▪ constant – indicates the “value” is a literal, constant • value - either a lookup reference or a literal, constant.
EXAMPLE	<pre><Func name="PERCENTAGE_OF"> <Arg name="number" type="lkup" value="item.mId.AddInteger" /> <Arg name="percentage" type="constant" value="33.33" /> <Arg name="precision" type="constant" value="0" /> </Func></pre>

CURRENT_OBJECT_INSTANCE

CURRENT_OBJECT_INSTANCE	
Returns the specified property of the current object instance as the answer value.	
<Arg/>	ATTRIBUTES:
item_attribute	REQUIRED <ul style="list-style-type: none"> • value – either the actual constant value or a specified object instance attribute <ul style="list-style-type: none"> ▪ num – returns the current object instance item number as the answer value. “Item number” is the index of the risk item among siblings in the same object - sort of like “birth order” ▪ tree_id – returns the current object instance tree ID as the answer value. “Tree ID” is the system-generated unique identifier for the specified object instance ▪ baseltemTreeId – returns the tree ID of the risk object instance base

	item as the valid answer values where the search category is an extension
EXAMPLE	<pre><Func name="CURRENT_OBJECT_INSTANCE"> <Arg name="item_attribute" value="num"/> </Func> <Func name="CURRENT_OBJECT_INSTANCE"> <Arg name="item_attribute" value="tree_id"/> </Func></pre>

OBJECT_INSTANCES

OBJECT_INSTANCES	
Checks to see if any object exists for the specified query. Returns the specified property of the object instance as the answer value or list of valid answer values.	
<Arg/>	ATTRIBUTES:
property	<p>REQUIRED: The specific property of the object instance to return</p> <ul style="list-style-type: none"> • value – the property to return as the answer value <ul style="list-style-type: none"> ▪ count - returns the number of risk object instances ▪ anyInstances – Checks to see if any object exists for the specified query. Returns “Yes” if there is at least one item for the object and “No” otherwise ▪ greaterValue – looks across all instances of the same object to find the greater value of a specified input among them. Value must be a valid numeric value (integer or decimal). Returns -1 if no answers found. ▪ list - returns a list of the instances for the specified object
item_context	<p>REQUIRED: Identifies the search objects relationship to the current object</p> <ul style="list-style-type: none"> • value – (required) the relationship description <ul style="list-style-type: none"> ▪ sibling – (default) searches only object instances that are siblings of the current object ▪ child – searches only object instances that are children of the current object ▪ descendants - the instance is a child, grandchild, great-grandchild, etc. of the current risk item ▪ path - the user must specify the category hierarchy using the category Custom ID, starting from the root. OR use “..” to specify a relative path • excludeCurrent – (optional) gives the user the ability to exclude the current instance <ul style="list-style-type: none"> ▪ true – excludes the current instance from the search ▪ false – (default) includes the current instance in the search
context_path	<p>REQUIRED when item_context value is path. Establishes the base context objects. Requires the specific <code><Arg name="category" value="[ObjectName]"/></code> for the object that is expected to be children of the context path object(s)</p> <ul style="list-style-type: none"> • value – the search path literal value, excluding the. Must be the specific search path in format: <ul style="list-style-type: none"> ▪ /parentObject ▪ /parentObject/childObject ▪ /parentObject/childObject/childObject ▪ etc
category	<p>REQUIRED: Identifies the risk item object to search for.</p> <ul style="list-style-type: none"> • value - risk object name. Defaults to the current category of the current question. User can only select from a list of valid objects, based on the

	previously defined item_context
mld	REQUIRED for greaterValue , OPTIONAL for anyInstances : the field or mapping ID (mld) that contains the value to search for <ul style="list-style-type: none"> value – Field name / Mapping ID. User can only select from a list of valid objects, based on the previously defined category
item_value	REQUIRED for anyInstances + mld only: describes the value to search for <ul style="list-style-type: none"> value – the actual value to search for
item_attribute	REQUIRED for list property only: <ul style="list-style-type: none"> value – either the actual constant value or a specified object instance attribute <ul style="list-style-type: none"> num – returns the current object instance item number as the answer value. "Item number" is the index of the risk item among siblings in the same object - sort of like "birth order" tree_id – returns the current object instance tree ID as the answer value. "Tree ID" is the system-generated unique identifier for the specified object instance name – (valid with attribute type only) returns the name (display) value of the risk object instances as the valid answer values. baseItemTreeId – returns the tree ID of the risk object instance base item as the valid answer values where the search category is an extension
default_text	OPTIONAL for list property only: <ul style="list-style-type: none"> value - a user-defined constant value that will display as the first item (default value) in the dropdown list. The stored answer value is "" (empty).

EXAMPLE

```

<Func name="OBJECT_INSTANCES">
  <Arg name="property" value="count"/>
  <Arg name="item_context" value="child"/>
  <Arg name="category" value="Instance"/>
</Func>

<Func name="OBJECT_INSTANCES">
  <Arg name="property" value="anyInstances"/>
  <Arg name="item_context" value="child"/>
  <Arg name="category" value="Instance"/>
</Func>

<Func name="OBJECT_INSTANCES">
  <Arg name="property" value="anyInstances"/>
  <Arg name="item_context" value="sibling"/>
  <Arg name="category" value="Instance"/>
  <Arg name="mId" value="InstanceTreeID"/>
  <Arg name="item_value"
value="0_DCFeatures_1_MultiInstance_1_Instance_4"/>
</Func>

<Func name="OBJECT_INSTANCES">
  <Arg name="property" value="greaterValue"/>
  <Arg name="item_context" value="child"/>
  <Arg name="category" value="Instance"/>
  <Arg name="mId" value="InstanceNumber"/>
</Func>

<Func name="OBJECT_INSTANCES">
  <Arg name="property" value="list"/>
  <Arg name="item_context" value="path"/>
  <Arg name="context_path" value="/DCFeatures/MultiInstance"/>
  <Arg name="category" value="Instance"/>

```

```

<Arg name="item_attribute" value="num"/>
<Arg name="default_text" value="-- Select --"/>
</Func>

```

CURRENT_SYSTEM_DATETIME

CURRENT_SYSTEM_DATETIME

Returns the current system (server) date-time stamp as the answer value.

EXAMPLE <Func name="CURRENT_SYSTEM_DATETIME"/>

Display Format

The question definition dialog should allow the user to apply a specified display format to the returned value. Include the questionnaire locale format, a list of pre-defined formats (similar to MS Excel examples below), and allow the user to specify a custom format.

Formatting Examples (Excel-like):

12/5/2013	Short Date
Thursday, December 05, 2013	Long Date
12:17:19 PM	Time
12/5/2013 12:17	Custom - m/d/yyyy h:mm
17:19.5	Custom - mm:ss.0
5-Dec-13	Custom - d-mmm-yy
Thursday, December 05, 2013 12:17:19.5 PM	Custom - dddd, mmmm dd, yyyy hh:mm:ss.0 AM/PM

LOOKUP

LOOKUP

Returns the the result of the lookup expression as the value as the answer value

<Arg/>	ATTRIBUTES:
expression	REQUIRED: indicates that the "value" attribute should be parsed and run as a lookup function <ul style="list-style-type: none"> • value - a lookup reference
override	OPTIONAL triggers the questions answer value to be refreshed on each page load <ul style="list-style-type: none"> • true – the value will by the lookup expression each time the page loads, regardless of whether the current value is empty • false – (default) the value will only be populated by the lookup expression when the current value is empty

EXAMPLE(s) <Func name="LOOKUP">
 <Arg name="expression" value="cat.Policy.mId.VersionInfo"/>
 <Arg name="override" value="true"/>
 </Func>

QUESTION BEHAVIOR – ACTION

ADD_OBJECT_INSTANCE

ADD_OBJECT_INSTANCE	
Manages the creation of a single object instance depending on create condition specified	
<Arg/>	ATTRIBUTES:
category	REQUIRED: Identifies the object to create. These items must be siblings of the current item. <ul style="list-style-type: none"> • value - risk object name
create_condition	REQUIRED: Identifies create conditions. Requires an ^rx style logic statement to specify create conditions. When true, appropriate risk items will be created. <ul style="list-style-type: none"> • when – the ^rx style logic statement (QCL)
EXAMPLE	<pre><Action name="ADD_OBJECT_INSTANCE"> <Arg name="category" value="OtherPersons"/> <Arg name="create_condition" when="item.mId.AddAnotherPerson eq Yes"/> </Action></pre>

DELETE_RISK_ITEMS

DELETE_RISK_ITEMS	
Allows an answer to a question to delete all instances of a specific object.	
<Arg/>	ATTRIBUTES:
category	REQUIRED: Identifies the object instances to delete. These items must be related to the current object instance as indicated by the item_context argument. <ul style="list-style-type: none"> • value - risk object name
delete_condition	REQUIRED: Identifies delete condition(s). Takes an ^rx style logic statement to specify delete conditions. When true, appropriate object instances will be deleted. <ul style="list-style-type: none"> • when - the ^rx style logic statement (QCL)
item_context	REQUIRED: Identifies the search objects relationship to the current object <ul style="list-style-type: none"> • value – (required) the relationship description <ul style="list-style-type: none"> ▪ sibling – (default) searches only object instances that are siblings of the current object ▪ child – searches only object instances that are children of the current object ▪ descendants - the instance is a child, grandchild, great-grandchild, etc. of the current risk item ▪ path - the user must specify the category hierarchy using the category Custom ID, starting from the root. OR use ".." to specify a relative path • excludeCurrent – (optional) gives the user the ability to exclude the current instance <ul style="list-style-type: none"> ▪ true – excludes the current instance from the search ▪ false – (default) includes the current instance in the search
context_path	REQUIRED when item_context value is path . Establishes the base context objects. Requires the specific <Arg name="category" value="[ObjectName]"/> for

	<p>the object that is expected to be children of the context path object(s)</p> <ul style="list-style-type: none"> • value – the search path literal value, excluding the. Must be the specific search path in format: <ul style="list-style-type: none"> ▪ /parentObject ▪ /parentObject/childObject ▪ /parentObject/childObject/childObject ▪ etc
--	--

EXAMPLE

```
<Action name="DELETE_RISK_ITEMS">
  <Arg name="category" value="Instance"/>
  <Arg name="delete_condition" when="item.mId.DeleteRiskItem eq Yes
and
cat.MultiInstance.mId.CountOfInstance gt 0"/>
  <Arg name="item_context" value="sibling" excludeCurrent="true"/>
</Action>
```

MANAGE_RISK_ITEM**MANAGE_RISK_ITEM**

Manages the creation and/or deletion of a single object instance depending on create and delete conditions specified

<Arg/>	ATTRIBUTES:
category	<p>REQUIRED: Identifies the object to create or delete. These items must be siblings or descendents of the current item as indicated by ITEM_CONTEXT.</p> <ul style="list-style-type: none"> • value - risk object name
create_condition	<p>REQUIRED: Identifies create conditions. Requires an ^rx style logic statement to specify create conditions. When true, appropriate risk items will be created.</p> <ul style="list-style-type: none"> • when – the ^rx style logic statement (QCL)
delete_condition	<p>REQUIRED: Identifies delete conditions. Takes an ^rx style logic statement to specify delete conditions. When true, appropriate risk items will be deleted.</p> <ul style="list-style-type: none"> • when - the ^rx style logic statement (QCL)
item_context	<p>REQUIRED: Identifies the search objects relationship to the current object</p> <ul style="list-style-type: none"> • value – (required) the relationship description <ul style="list-style-type: none"> ▪ sibling – (default) searches only object instances that are siblings of the current object ▪ child – searches only object instances that are children of the current object • excludeCurrent – (optional) gives the user the ability to exclude the current instance <ul style="list-style-type: none"> ▪ true – excludes the current instance from the search ▪ false – (default) includes the current instance in the search
property	<p>OPTIONAL: Identifies properties to set on newly created risk item. These can be literal values or look ups from other questions.</p> <ul style="list-style-type: none"> • mId - REQUIRED, specify a field name/mapping ID to identify the property to be set • type - the argument type <ul style="list-style-type: none"> ▪ lkup – indicates the “value” attribute should be parsed and run as a lookup function ▪ constant – indicates the “value” is a literal, constant • value - either a lookup reference or a literal, constant

EXAMPLE

```
<Action name="MANAGE_RISK_ITEM">
  <Arg name="category" value="Coinsured"/>
  <Arg name="create_condition" when="pol.mId.CoinsuredYN eq Yes"/>
</Action>
```

```

<Arg name="delete_condition" when="pol.mId.CoinsuredYN eq No"/>
<Arg name="item_context" value="sibling"/>
<Arg name="property" mId="LastName" type="lkup"
value="insured.mId.LastName"/>
</Action>

```

- **CREATE WHEN** context menu – allows the user to Insert ‘OR’ and/or ‘AND’ logical operators to create complex QCL statements.
- **DELETE WHEN** context menu – allows the user to Insert ‘OR’ and/or ‘AND’ logical operators to create complex QCL statements.
- **ITEM CONTEXT** right-click context menu – allows the user to Insert an optional ‘PROPERTY’ argument and allow the user to Exclude Current object instance.
- **PROPERTY** context menu – allows the user to Insert an additional ‘PROPERTY’ argument, or Delete itself.

OVERRIDE

OVERRIDE

Overrides the values of one or more question items with the value of the current question or that of an optional explicit override value

<Arg/>	ATTRIBUTES:
target	REQUIRED: Overrides the specified object field/mapping ID with the current answer's value or the optional override value. <ul style="list-style-type: none"> • value - REQUIRED a lookup expression that specifies the object field/mapping ID to override • overrideValue - OPTIONAL a literal value to set for the target item

EXAMPLE

```

<Action name="OVERRIDE">
  <Arg name="target"
value="cat.DCFeatures.mId.OverriddenValue"/>
</Action>

<Action name="OVERRIDE">
  <Arg name="target" value="cat.DCFeatures.mId.OverriddenValue"
overrideValue="OverrideAction"/>
</Action>

```

- **TARGET** right-click context menu – allow the user to Insert additional TARGET arguments or, if there is more than one TARGET, delete itself.

REFRESH_ANSWER

REFRESH_ANSWER

Forces one or more questions to refresh their current values by executing any defaults, lookup commands, functions, or actions assigned.

<Arg/>	ATTRIBUTES:
target	REQUIRED: Holds parameters used to find the object field/mId to be refreshed. <ul style="list-style-type: none"> • value - is always a lookup command, identifies the object field/mId to

	refresh.
EXAMPLE	<pre><Action name="REFRESH_ANSWER"> <Arg name="target" value="pol.mId.VersionInfo"/> </Action> <Action name="REFRESH_ANSWER"> <Arg name="target" value="cat.AnswerMaps.mId.MultiplyDecimal"/> <Arg name="target" value="cat.AnswerMaps.mId.DivideDecimal"/> <Arg name="target" value="cat.AnswerMaps.mId.AddDecimal"/> </Action></pre>

- **TARGET** right-click context menu – allow the user to Insert additional TARGET arguments or, if there is more than one TARGETS, delete itself.

SET_IF_EMPTY

SET_IF_EMPTY	
Set any of the specified questions whose values are empty to the value of the question whose response map defines this action.	
ATTRIBUTES:	
onChangeOnly - OPTIONAL	
<ul style="list-style-type: none"> • true - the action will only be taken if the value of the answer has changed • false - (default) the action will always be taken 	
<Arg/>	ATTRIBUTES:
target	REQUIRED: the parameters used to identify the object field/mId to set. <ul style="list-style-type: none"> • value - a lookup reference identifying object field name / mapping ID to be set
EXAMPLE	<pre><Action name="SET_IF_EMPTY" onChangeOnly="false"> <Arg name="target" value="cat.DCFeatures.mId.ValueEmpty"/> </Action></pre>

CALCULATE_ANSWER

CALCULATE_ANSWER	
Looks up the values of one or more questions and/or constant values and sets the calculated result as the value of the specified target question	
ATTRIBUTES:	
onChangeOnly - OPTIONAL	
<ul style="list-style-type: none"> • true - the action will only be taken if the value of the answer has changed • false - (default) the action will always be taken 	
<Arg/>	ATTRIBUTES:
function_type	REQUIRED: Identifies the type of math function to build/use to set the target answer value. <ul style="list-style-type: none"> • value - the argument type <ul style="list-style-type: none"> ▪ add_values – performs addition of the values and returns their sum
addend	REQUIRED for function type “add_values”: A value to be added to the sum. At least two ADDEND arguments are required. <ul style="list-style-type: none"> • type - the argument type <ul style="list-style-type: none"> ▪ lkup – indicates the “value” attribute should be parsed and run as a lookup function, ▪ constant – indicates the “value” is a literal, constant

	<ul style="list-style-type: none"> • value - either a lookup reference or a literal, constant.
precision	<p>OPTIONAL: Causes the function result (sum) to be rounded to the specified number of decimal places. If precision is omitted, the sum is rounded to zero decimal places (integer).</p> <ul style="list-style-type: none"> • type - the argument type <ul style="list-style-type: none"> ▪ lkup – indicates the “value” attribute should be parsed and run as a lookup function, ▪ constant – indicates the “value” is a literal, constant • value - either a lookup reference or a literal, constant.
target	<p>REQUIRED, defines the target question whose value will be set to the sum.</p> <ul style="list-style-type: none"> • value – a lookup expression
EXAMPLE	<pre><Action name="CALCULATE_ANSWER" onChangeOnly="true"> <Arg name="function_type" value="add_values"/> <Arg name="addend" type="lkup" value="item.mId.SetTotal"/> <Arg name="addend" type="lkup" value="item.mId.IntegerValue"/> <Arg name="addend" type="lkup" value="item.mId.IncrementInteger"/> <Arg name="addend" type="constant" value="2.751"/> <Arg name="precision" type="constant" value="3"/> <Arg name="target" value="item.mId.ValueTotal"/> </Action></pre>

- **ADDEND** right-click context menu – allow the user to Insert additional ADDEND arguments or, if there are more than two ADDENDs, delete itself

QUESTION BEHAVIOR – ACTIVITIES

- Supplemental Data - Initiates a supplemental data activity.

Documents

Documents answer maps will 'have knowledge' of the possible related service if "Documaker" is the service provider. DataCapture/Documaker integration requirements will be addressed in a separate document.

Provider argument is required for the documents activity type.

Documents	
Initiates a document activity.	
ATTRIBUTES:	
type	REQUIRED: The specific activity type <ul style="list-style-type: none"> • Documents
<Arg/>	ATTRIBUTES:
Provider	REQUIRED: The name of the documents service provider. <ul style="list-style-type: none"> • value - either a lookup reference or a literal, constant <ul style="list-style-type: none"> ▪ Documaker (Default) the literal value "Documaker" ▪ Custom – a user-defined custom value
EXAMPLE	<pre><Activity type="Documents" serviceAdaptorName="DocumentsService" executionContext="onLoad" showStatusMessage="always" includeProjectData="true"> <Arg name="Provider" value="Documaker"/> <Arg name="Service" value="Application"/> </Activity></pre>

ListOfValues

ListOfValues	
Initiates a list of values (LOV) activity.	
ATTRIBUTES:	
type	REQUIRED: The specific activity type <ul style="list-style-type: none"> • ListOfValues
EXAMPLE	<pre><Activity type="ListOfValues" serviceAdaptorName="LOVTestSoftData" executionContext="onLoad" showStatusMessage="fail" includeProjectData="false"> <Arg name="TargetID" value="2"/> <Arg name="ValueResultID" value="2"/> <Arg name="DisplayTextResultID" value="3"/> <Filters> <Filter name="CoverageCd" type="static" value="PD" index="1"/> <Filter name="StateProvCd" type="lkup" value="pol.mId.ControllingStateProvCd" index="2"/> </Filters> </Activity></pre>

ProjectSubmit

ProjectSubmit	
Initiates a policy submit activity.	
ATTRIBUTES:	
type	REQUIRED: The specific activity type <ul style="list-style-type: none"> ProjectSubmit
EXAMPLE	<pre><Activity type="ProjectSubmit" serviceAdaptorName="PolicySubmitMockImpl" executionContext="onLoad" showStatusMessage="always" includeProjectData="true"/></pre>

Rating

Rating (and Rules) answer maps will ‘have knowledge’ of the possible related programs if “Insbridge” is the service provider. The user will be required to select the release and controller program that is the rating entry point for this questionnaire. DataCapture/Insbridge integration requirements will be addressed in a separate document.

Provider argument is required for the rating activity type.

Rating	
Initiates a rating activity.	
ATTRIBUTES:	
type	REQUIRED: The specific activity type <ul style="list-style-type: none"> Rating
<Arg/>	ATTRIBUTES:
Provider	REQUIRED: The name of the rating service provider. <ul style="list-style-type: none"> value - either a lookup reference or a literal, constant <ul style="list-style-type: none"> Insbridge (Default) the literal value “Insbridge” Custom – a user-defined custom value
EXAMPLE	<pre><Activity type="Rating" serviceAdaptorName="RatingService" executionContext="onLoad" showStatusMessage="always" includeProjectData="true"> <Arg name="Provider" value="Insbridge"/> </Activity></pre>

Rules

Rules (and Rating) answer maps will ‘have knowledge’ of the possible related programs if “Insbridge” is the service provider. The user will be required to select the release and controller program that is the rules entry point for this questionnaire. DataCapture/Insbridge integration requirements will be addressed in a separate document.

Provider argument is required for the rules activity type.

Rules	
Initiates a rule activity.	
ATTRIBUTES:	

type	REQUIRED: The specific activity type <ul style="list-style-type: none"> Rules
<Arg/>	ATTRIBUTES:
Provider	REQUIRED: The name of the rules service provider. <ul style="list-style-type: none"> value - either a lookup reference or a literal, constant <ul style="list-style-type: none"> Insbridge (Default) the literal value "Insbridge" Custom – a user-defined custom value
EXAMPLE	<pre><Activity type="Rules" serviceAdaptorName="RulesService" executionContext="onLoad" showStatusMessage="always" includeProjectData="true"> <Arg name="Provider" value="Insbridge"/> </Activity></pre>

SupplementalData

SupplementalData	
Initiates a supplemental data activity.	
ATTRIBUTES:	
type	REQUIRED: The specific activity type <ul style="list-style-type: none"> SupplementalData
EXAMPLE	<pre><Activity type="SupplementalData" serviceAdaptorName="SupplementalDataMockService" executionContext="onLoad" showStatusMessage="always" includeProjectData="true"> <Arg name="Provider" value="SampleContent"/> <Arg name="Service" value="SupplementalDataCalloutRecordsXML"/> <Arg name="ObjectType" value="Insured"/> <Filters> <Filter name="FirstName" type="lkup" value="insured.mId.FirstName"/> <Filter name="LastName" type="lkup" value="insured.mId.LastName"/> <Filter name="BirthDt" type="lkup" value="insured.mId.BirthDt"/> </Filters> </Activity></pre>

QUESTION BEHAVIOR – ANSWER MAPS

Valid Answer List

<A /> - The XML A answer map is used when you want to present a list of available answers. For example, when you want to use a dropdown list.

A	
The XML A answer map is used when you want to present a list of available answers. For example, when you want to use a dropdown list. You can list as many selections as you need.	
ATTRIBUTES:	
value=""	REQUIRED: The XML "value" attribute defines the data that will be stored as the answer value. This could be a literal value or a code that represents the value. The first value in the list will be the default value of the question using the answer map. Using empty double quotes for the value ("") means the value is a null.
name=""	The XML "name" attribute defines the data that will be displayed on the Questionnaire screen.
Example:	<pre> </pre>

Validation

Validation	
Allows the user to specify a condition, which – if true – will display an error message	
ATTRIBUTES:	
name	REQUIRED: <ul style="list-style-type: none"> CONDITIONS
<Arg/>	ATTRIBUTES:
test	REQUIRED: describes the condition(s) to search for. If the result is "true", the message will display <ul style="list-style-type: none"> value – an ^rx style expression (QCL)
ErrorMessage	REQUIRED: contains the message that will display if the conditions are met. <ul style="list-style-type: none"> value – a literal string value
EXAMPLE(S)	<pre><Validation name="CONDITIONS"> <Arg name="when" value="item.mId.DecimalValue lte 0 or item.mId.IncrementDecimal lte 0"/> <Arg name="ErrorMessage" value="Decimal Value and Increment Decimal Value answer values must be greater than zero in order to calculate the Divide by Decimal, Multiply by Decimal, and Add Decimal values on the Answer Maps form, Answer Map Functions question group."/></pre>

</Validation>

Report Display

ReportDisplay

Displays the response data returned from a callout request. Can also be used to display or HTML formatted question or answer map data.

ARGUMENTS:	ATTRIBUTES:
ReportType	REQUIRED: Specifies the report that is needed. <ul style="list-style-type: none">• value="x" where x equals either:<ul style="list-style-type: none">- SoftServiceReturnedHtml- AnswerMapHTML- DefaultProjectReport
CalloutRequestorName	Optional: Specifies the requestor to be used. <ul style="list-style-type: none">• value - the user defined name of the callout service (e.g., PolicySubmit.PolicySubmitImpl)
ReportHTML	Optional: The literal HTML values of the report format and verbiage to be displayed

EXAMPLE: `<Func name="ReportDisplay">`
`<Arg name="ReportType" value="SoftServiceReturnedHtml"/>`
`<Arg name="CalloutRequestorName"`
`value="PolicySubmit.PolicySubmitMockImpl"/>`
`</Func>`

`<Func name="ReportDisplay">`
`<Arg name="ReportType" value="AnswerMapHTML"/>`
`<ReportHTML>`
`<p>`
`<span style="color:#CC0000; font-weight:bold"`
`This page is intentially left blank`
`</p>`
`<p/>`
`<p>Reserved for future use</p>`
`<p/>`
`</ReportHTML>`
`</Func>`

`<Func name="ReportDisplay">`
`<Arg name="ReportType" value="DefaultProjectReport"/>`
`</Func>`

choose (Conditional Maps)

This is a 'wrapper' on two or more answer maps that apply to one question. The "when" and "otherwise" conditions determine which map will be used at runtime.

choose	
Allows users to create conditional question behaviors.	
Additional Elements:	
<when/>	REQUIRED Contains the Map applicable to the specified test condition.
ATTRIBUTES:	
test	REQUIRED An ^rx style expression (QCL) that describes the condition for the availability of the set of values in the related Map
<otherwise/>	REQUIRED Contains the Map applicable to all other conditions that are not identified by when elements.
<Map/>	REQUIRED Each <when/> and <otherwise/> element must contain a valid, properly formed answer map

EXAMPLE(s)

```

<choose>
  <when test="item.isFirstOfKind eq true and (item.category eq
SubFormInstance or item.category eq Instance)">
    <Map>
      <A value="FirstOfKind" name="First Of Kind"/>
    </Map>
  </when>
  <when test="item.isFirstOfKind neq true and (item.category eq
SubFormInstance or item.category eq Instance)">
    <Map>
      <A value="" name="-- Select --"/>
      <A value="NotFirstOfKind" name="Not First Of Kind"/>
    </Map>
  </when>
  <otherwise>
    <Map>
      <A value="" name="-- Select --"/>
      <A value="AllOther" name="All Other"/>
      <A value="OnlyOfKind" name="Only Of Kind"/>
    </Map>
  </otherwise>
</choose>

```

Index

INDEX**^**

^rx, 132

<

<A />

Question Behavior, 159

<Action>

Question Behaviors, 86

<choose />

Conditional Question Behavior, 96

<Func />, 83, 84

<object reference>, 132

<Operator Values>, 140

<Operators>, 139

<Property Values>, 139

<Property>, 138

A

Action Question Behaviors, 86

Alignment

Answer Display Format, 81

appMode

Object References Properties, 137

Arg

Action Question Behavior, 86

Arguments

Action Question Behavior, 86

Assign

Question Groups, 58

Assigning Question

Question Group, 62, 65

Asterisk

Required Field, 23, 38, 79

Available Products

Products Page, 13

B

Back

Questionnaire, 26

baseCategory

Object References Properties, 137

baseltem

Object References, 133

businessProcess

Object References Properties, 137

C

Calendar

Question Control Type, 104

cat.<RiskCategory>, 134

Category Association

Risk Category Details Tab, 37

Child Definition

Questions, 76

Child Dependent Question

Visibility, 100

Child Question Sequence #

Add New Question, 79

Child Questions, 76, 100

Column Sorting, 17

Columns

Question Group Properties, 61

Comparison Operators, 139

Conditional Answer Map

Format, 94

Conditional Question Behavior, 96

Configuring

OIDC, 124

coninsured

Object References, 134

Control Type

Manage Questions, 71

Control Types

Add New Question, 78

Question, 101

Copy

Manage Questions, 71

Copying

Questions, 107

Copying Text, 19

Creating

Question Group, 59

Questions, 76

Tabs, 44

Cutting Text, 19

D

Date Packaged

Manage Releases, 111

Date Published

Manage Releases, 111

Decimal Symbol, 30

Default Prefix

Risk Category Properties, 38

Default Value

Add New Question, 79

Deleting

Question Group, 69

Questionnaire, 34

Questions, 107

Release, 113

Delting

Tabs, 55

Dependent Questions, 100

Description

Manage Questionnaire, 22

- Project Page, 14
- Digit Grouping Symbol, 30
- Display Condition, 98
 - Add New Question, 98
- Display Text
 - Question Group Properties, 61
 - Question Groups, 58

E

- Edit
 - Manage Questions, 71
 - Question Groups, 58
 - Risk Category Listing, 36
- Editing
 - Product Page, 15
 - Question Group, 67
 - Questionnaire, 33
 - Tabs, 54
- Edition Notice, 2
- Entering
 - Name Formats, 41
 - Risk Category Properties, 38

F

- Fields
 - Add New Question, 78
 - Manage Question Groups, 58
 - Manage Releases, 110
 - Manage Tabs, 44
 - Questionnaire, 22
- firstInstance
 - Object References, 134
- Format
 - QCL Statements, 130
- Function Question Behavior, 83, 84
- Functionality
 - Add New Question, 79
 - Edit New Question, 79
 - Manage Questionnaire, 22
 - Manage Questions, 73
 - Manage Releases, 111
 - Manage Tabs, 44
 - Project Page, 14
 - Question Groups, 58
 - Risk Category Listing, 36

G

- Generating a Release, 112

H

- hasANY<objectID>
 - Object References Properties, 137
- Height
 - Answer Display Format, 81
- Help Text
 - Add New Question, 99
- Hidden Constant

- Question Control Type, 103
 - Using, 98
- Home Key
 - Usage, 19

I

- Icon
 - Project Page, 14
 - Risk Category Properties, 38
- ID
 - Add New Question, 78
 - Manage Questions, 71
 - Manage Releases, 111
 - Project Page, 14
 - Question Group Properties, 61
 - Question Groups, 58
- Input
 - Question Preparation, 74
- insured
 - Object References, 134
- isColnsured
 - Object References Properties, 137
- isFirstOfKind
 - Object References Properties, 137
- isInsured
 - Object References Properties, 137
- isLastOfKind
 - Object References Properties, 137
- item
 - Object References, 134

L

- Label
 - Project Page, 14
 - Question Control Type, 103
- Labeled Check Box
 - Question Control Type, 102
- Last Release Label
 - Manage Questionnaire, 22
- Late Release Date
 - Manage Questionnaire, 22
- Locale
 - Manage Questionnaire Tabs, 28
- Lookups
 - Lkup Question Behavior, 86

M

- Manage Question Groups, 57
- Manage Questionnaire, 21
- Manage Questions, 71
- Manage Releases, 110
- Manage Risk Categories, 35
- Manage Tabs, 43
- Map
 - Conditional Question Behaviors, 94
- Mapping ID
 - Add New Question, 79
- Maximum Instance
 - Risk Category Properties, 38

maxNumberOfKind
 Object References Properties, 137
 mld.<mld>
 Object References Properties, 137
 Minimum Instance
 Risk Category Properties, 38
 Multi Column Layout
 Question Layout, 25
 Multi Level Radio Box
 Question Control Type, 103
 Multi Line Text Input
 Question Control Type, 102

N

Name
 Manage Questionnaire, 22
 Manage Tabs, 44
 Question Group Properties, 61
 Question Groups, 58
 Tab Properties, 47
 Name Format
 Risk Category Properties, 38
 Name Formats
 Format, 42
 Risk Categories, 40
 Next
 Questionnaire, 26
 numberOf.<objectID>
 Object References Properties, 137
 numberOfKind
 Object References Properties, 137

O

Object Definition, 132
 Object Reference, 132
 Object References Properties, 137
 objectName
 Object References Properties, 137
 OIDC
 Configuring, 124
 Opening
 Questionnaire, 24
 Operator Values, 140
 Rules, 140
 Operators, 139
 Oracle Resources, viii
 Orientation
 Answer Display Format, 81
 otherwise
 Conditional Question Behaviors, 94
 Output
 Question Preparation, 74

P

Page Navigation
 Default, 26
 Page Settings, 16
 Paging, 16
 Palette Contents, 10

Palette Definition, viii
 Palette Relationships, 12
 Panel
 Question Types, 74
 Parent ID
 Manage Questions, 72
 Parent Question ID
 Add New Question, 79
 Parent Questions, 75
 Parent/Trigger
 Question Types, 74
 parentItem
 Object References, 135
 parentVal
 Object References, 135
 Pasting Text, 19
 PC Definition, 12
 pol
 Object References, 135, 136
 Postback
 Question Types, 74
 Postback Questions, 75
 Preparation
 Questions, 73
 Preparation for Creating Tabs, 45
 Preparation for Question Groups, 59
 prj
 Object References, 135
 Product Details
 Products Page, 13
Properties
 Manage Questionnaire Tabs, 23
 Question Group, 60
 Risk Category Details Tab, 37
 Properties for a New Tab, 46
 Property
 QCL, 138
 Property Values, 139
 Publishing a Release, 114

Q

QCL, 130
 Structure, 130
 QCL Statements
 Format, 130
 QCL Structure
 Object Reference, 132
 Operator Values, 140
 Operators, 139
 Property, 138
 Property Values, 139
 Question Condition Language, 130
 Question Conditions, 100
 Question Group Assignment
 Assigning Question Groups, 51
 Searching Tab, 52
 Question Group Assignment Assigned
 Tab, 51
 Question Group Assignment for a New Tab, 49
 Question Group Assignment Unassigned
 Tab, 50

Question Group Assignment Unsigning
 Tab, 52
 Question Text
 Manage Questions, 71
 Question Type
 Manage Questions, 72
 Question Types
 Add New Question, 78
 Questionnaire
 View UI Config XML, 117
 Viewing in XML Format, 116
 Questionnaire Overrides
 Name Formats, 40
 questionnaireName
 Object References Properties, 137
 Questions
 New, 76
 Relationships, 12
 Reordering on Question Group, 64
 Worksite, 109

R

Radio Box
 Question Control Type, 103
 Records Per Page
 Setting, 16
 Release Name
 Manage Releases, 111
 Releases, 114
 Reordering
 Questions in Question Group, 64
 Report Panel
 Question Control Type, 105
 ReportDisplay
 Function Answer Map, 160
 Required
 Add New Question, 79
 Manage Questions, 72
 Required Field
 Asterisk, 23, 38, 79
 Restricted Special Characters, 141
 Right Click Menus
 Products Page, 14
 Risk Categories
 Grayed Out Entries, 39
 Risk Category Assignment for a New Tab, 48
 Risk Category Details, 37
 Risk Categories, 35
 Risk Category Listing
 Risk Categories, 35
 Risk Category Order on Tabs, 48
 Risk Category Tree Title
 Tab Properties, 47
 Risk Item Table
 Question Control Type, 104, 105
 Risk Object
 Question Groups, 58
 Risk Objects
 Question Group Properties, 61
 Rows
 Answer Display Format, 81

S

screenID
 Object References Properties, 137
 Searching, 18
 Manage Questions, 73
 Question Group, 66
 Question Group Assignment, 52
 Secure Text Input
 Question Control Type, 104
 Selection
 Manage Questionnaire, 22
 Manage Releases, 110
 Manage Tabs, 44
 SERVERNAME
 Replacing, 124
 Show Risk Category Tree
 Manage Tabs, 44
 Tab Properties, 47
 Simple
 Question Types, 74
 Simple Questions, 76
 Single Line Text Input
 Question Control Type, 102
 Single Select List
 Question Control Type, 104
 Sorting, 17
 state
 Object References Properties, 137
 status
 Object References Properties, 137
 Sub Ques List Mgr
 Question Control Type, 104

T

Tab Type
 Manage Tabs, 44
 Table
 Question Types, 74
 Tabs
 In Questionnaire, 56
 Manage Questionnaire, 24
 Text
 Add New Question, 79
 Cutting and Pasting, 19
 Title
 Manage Tabs, 44
 Tab Properties, 47
 Title Bar
 Tab Properties, 47
 Trigger Questions, 75

U

Unassigning Question
 Question Group, 64
 Usage
 Home Key, 19
 UserGroupID
 Object References Properties, 137
 UserName

Object References Properties, 137

V

Value Operators, 140

ValueLookup, 132

View Risk Category Schema XML, 116

View SSIX XML, 118

View UI Config XML, 117

Visibility

 Child Dependent Question, 100

W

when

 Conditional Question Behaviors, 94

Width

 Answer Display Format, 81

Worksite Definition, viii

X

XML A Question Behavior, 159