

Oracle Insurance

**Product Configuration
User Guide**

Release 1.0

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Oracle Insurance Product Configuration User Guide

Release 1.0

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Primary Author: Mary Elizabeth Wiger

Contributing Authors: Laura Childers

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CONTENTS

Preface	vi
Audience	vi
Related Documents	vi
Conventions	vi
System Requirements.....	vii
Manual History	vii
CHAPTER 1	
Overview of Product Configuration	8
Accessing Product Configuration	10
Preparation for Creating a Product	11
Hierarchy in PC	12
CHAPTER 2	
Product Configuration	13
Home Page	14
Navigating PC	15
Domain Management.....	22
Domain Management Functionality	24
General Info Tab	24
Versions Tab.....	25
Creating a New Domain.....	27
Editing a Domain.....	28
Deleting a Domain	28
Domain Versions.....	29
Creating a New Domain Version.....	30
Editing a Domain Version	31
Deleting a Domain Version	32
CHAPTER 3	
Business Modeling.....	33
Component Listing Functionality.....	34
Detail View Functionality.....	34
Domain Version.....	36
General Info Tab	36
Model Inheritance Tree	37
Model Inheritance Table	39
System Root, App Root, Products, and Groups	40
General Info Tab	40

Opening a Business Modeling Object.....	41
Creating a New Business Object Model	41
Editing a Business Object Model	41
Deleting a Business Object Model	42
Business Object Model	43
Objects	44
Objects Functionality.....	44
Object Functionality	45
Creating a New Object.....	46
Editing a Object.....	47
Deleting a Object.....	47
Fields.....	49
Fields Functionality	49
Field Functionality	50
Creating a New Field	51
Editing a Field	51
Deleting a Field	52
Product Object Model	53
Product Object Model Functionality	53
General Info Tab	53
Product Versions.....	54
Opening a Product Version.....	55
Object Model Tab.....	57
Payload XSD.....	58
Creating a New Product.....	59
Creating a New Product Version.....	59
 CHAPTER 4	
Product Implementation	61
 CHAPTER 5	
PC Administration	62
Tool Connections	62
Data Capture Palette	63
Approval Workflow	64
Integration	67
Sample Response XMLs	68
 SUPPORT	
Contacting Support	74
 GLOSSARY	
Glossary Terms.....	75
 INDEX	
Index	78

LIST OF FIGURES

FIGURE 1 DEFINING ELEMENTS AT THE PRODUCT LEVEL.....	8
FIGURE 2 DEFINING ELEMENTS WITH A REUSABLE SCHEMA	9
FIGURE 3 PRODUCT CONFIGURATION LOG IN	10
FIGURE 4 MODEL OF A BUSINESS DOMAIN HIERARCHY	12
FIGURE 5 PRODUCT CONFIGURATION HOME PAGE	13
FIGURE 6 SELECTING A DOMAIN	14
FIGURE 7 FULL PANE VIEW.....	15
FIGURE 8 TABLE VIEW OPTION	17
FIGURE 9 MANAGE COLUMNS	17
FIGURE 10 TABLE COLUMNS	18
FIGURE 11 NOTES	19
FIGURE 12 ENTERING A NEW NOTE	20
FIGURE 13 QUERY BY EXAMPLE	21
FIGURE 14 DOMAIN MANAGEMENT – DOMAIN LISTING.....	22
FIGURE 15 DOMAIN MANAGEMENT – DOMAIN DETAILS.....	23
FIGURE 16 GENERAL INFO TAB FOR DOMAIN	24
FIGURE 17 GENERAL INFO TAB FOR DOMAIN	25
FIGURE 18 CREATING A NEW DOMAIN.....	27
FIGURE 19 EDITING A DOMAIN	28
FIGURE 20 SEQUENTIAL VERSIONS	29
FIGURE 21 CREATING A NEW DOMAIN VERSION	30
FIGURE 22 NEW BRANCHED DOMAIN VERSION LISTING	31
FIGURE 23 EDITING A DOMAIN VERSION.....	31
FIGURE 24 EDITING A DOMAIN VERSION FORM GENERAL TAB.....	31
FIGURE 25 BUSINESS MODELING	33
FIGURE 26 BUSINESS MODELING, DOMAIN VERSION	36
FIGURE 27 BUSINESS MODELING, MODEL INHERITANCE TREE	37
FIGURE 28 BUSINESS MODELING, BUSINESS OBJECT MODELS TABLE.....	39
FIGURE 29 BUSINESS MODELING, SYSTEM ROOT.....	40
FIGURE 30 BUSINESS MODELING, NEW/EDIT BOM	42
FIGURE 31 BUSINESS MODELING, DELETE BOM.....	42
FIGURE 32 BUSINESS OBJECT MODEL (OPEN)	43
FIGURE 33 BUSINESS OBJECT MODEL TREE, APPROOT BOM.....	44
FIGURE 34 BUSINESS OBJECT MODEL TREE, OBJECTS.....	44
FIGURE 35 BUSINESS OBJECT MODEL, OBJECT	45
FIGURE 36 CREATING A NEW OBJECT	46
FIGURE 37 SEARCHING FOR A TEMPLATE	48
FIGURE 38 BUSINESS OBJECT MODEL TREE, FIELDS.....	49
FIGURE 39 BUSINESS OBJECT MODEL, FIELD	50
FIGURE 40 CREATING A NEW FIELD	51
FIGURE 41 GENERAL INFO TAB FOR PRODUCT	53
FIGURE 42 PRODUCT OBJECT MODELS	54
FIGURE 43 PRODUCT OBJECT MODEL.....	55
FIGURE 44 PRODUCT OBJECT MODEL VERSION INFO.....	56
FIGURE 45 PRODUCT OBJECT MODEL VERSION XML.....	57
FIGURE 46 PRODUCT OBJECT MODEL VERSION XSD.....	58
FIGURE 47 CREATING A PRODUCT.....	59
FIGURE 48 PRODUCT GENERAL INFO	60
FIGURE 49 PRODUCT IMPLEMENTATION – DATA CAPTURE.....	61
FIGURE 50 PC ADMINISTRATION.....	62
FIGURE 51 PC TOOLS	63
FIGURE 52 APPROVAL HIERARCHY CHART	64

FIGURE 53 PC APPROVAL WORKFLOW MANAGEMENT – NO APPROVAL IN PLACE 65
FIGURE 54 PRODUCT CONFIGURATION HOME PAGE NO DOMAINS 66

PREFACE

Welcome to the Oracle Insurance Product Configuration User Guide. Oracle Insurance Product Configuration is a web-based insurance product modeling solution that centralizes product data and validation rule definitions and provides a single product schema reference for integrated external systems.

This guide explains the features and functionality of Product Configuration.

AUDIENCE

This guide is intended for users who need a business modeling tool that allows them to create a re-usable schema that defines their insurance product.

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

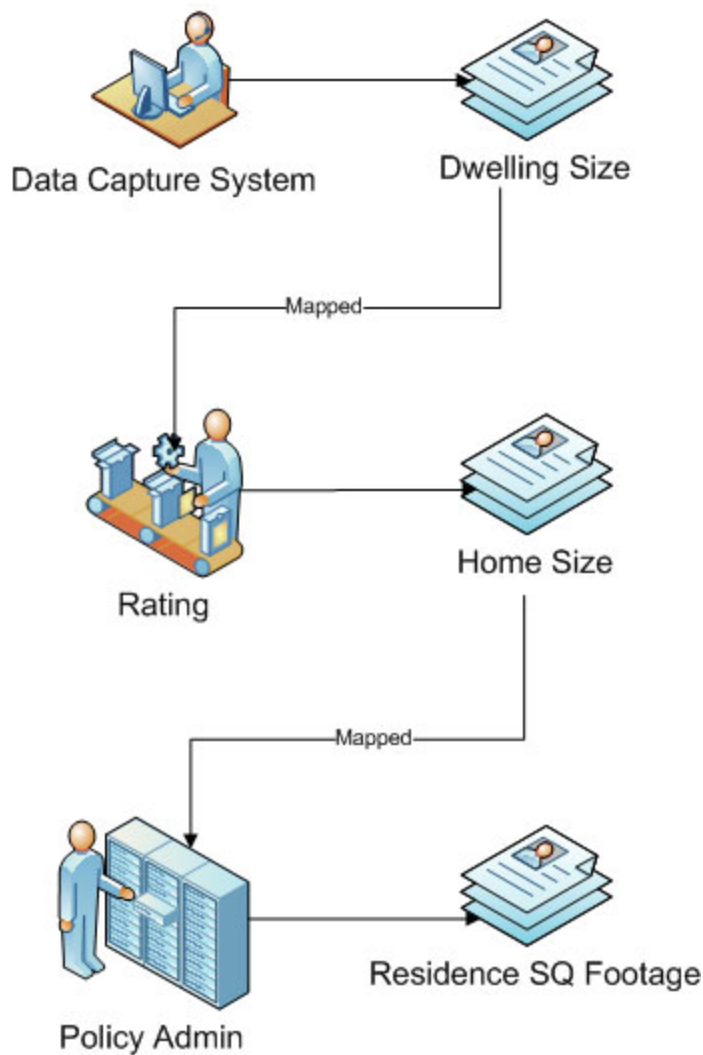
New editions incorporate any updates issued since the previous edition.

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 PRODUCT CONFIGURATION

The Product Configuration (PC) is a business modeling tool that allows you to create a reusable hierarchical schema that defines your insurance products. The business model can be complex or simple, have a multi-layered structure or a flat structure, or have precise, detailed definitions or broad, more generalized definitions. The composition of the business model is completely up to the designer.

An inheritance schema is a schema that contains the definitions of the objects (categories or risk items) and fields (inputs and outputs) that can be used to model multiple products. Since it is defined in one place, it can be shared across multiple systems. This means that your objects and fields are defined in the same way in every system throughout the product lifecycle. A reusable schema reduces data type incompatibility, mapping errors, and conflicting definitions that can be found in many multisystem environments.



For example, if you have a homeowners product, you will have to define the many elements of that product in each system.

In your front end data capture system you may have a field that holds the size of the home called Primary Dwelling Size. The field is defined as an integer only field with 6 digits and no special characters.

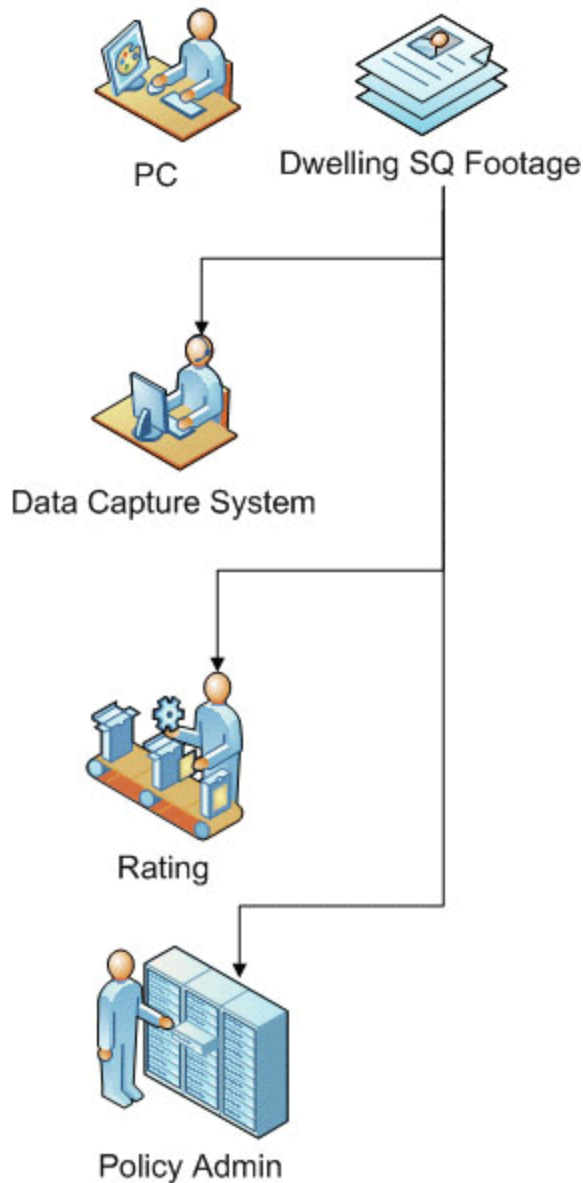
In your rating system the same input may be called Home Size and is defined as a string field with 10 digits and open for special characters.

In your policy admin system, the input may be called Residence SQ Footage and is a decimal field with 30 digits and two special characters.

In each case, the input is the same but the naming conventions, field descriptions, and data types are different. Incorrect mapping from one system to another could easily happen, and the various data types and field sizes could cause issues.

While it is possible that only one system may require a unique element that is not used by any other systems. It is much more likely that the same information is used by multiple systems. This may include data such as the insured's name and address, the size of the dwelling, and the purchase price.

Figure 1 Defining Elements at the Product Level



With a reusable schema, Product Configuration would hold the defining information that is shared across multiple systems. This assures that the inputs and outputs would be uniform in terms of naming, field size, and data type across all systems.

In this example, the size of the home input would be defined in Product Configuration. The input may be named Dwelling SQ Footage and be defined as integer only field with 10 digits and no special characters.

That definition would get pushed out to all systems. Regardless of what system is using the input, the definition, field size, and data type would be the same.

The input could flow from one system to the next with minimal risk of incorrect mapping, or incompatible data types.

Furthermore, if the input needed to be updated, the updates would be done in one location (Product Configuration). The updated input would be pushed to the other systems, ensuring that all systems are using the same values.

Figure 2 Defining Elements with a Reusable Schema

Accessing Product Configuration

Prior to accessing Product Configuration, you should have received:

- **Product Configuration URL:** Product Configuration can be accessed by going to **http://<yourserver>:<portnumber>/PCP10/faces/pcpLoginPage.jspx**, where <yourserver> is the name of the server where PCP is installed and <portnumber> is the port being used.

For WebLogic, the most common port is 7001. However, this can be changed at installation. Please use the port provided to you.

- **Username:** usernames are required.
- **Password:** passwords are required.

Access to Product Configuration is gained through a login screen. To log in, enter your username and password and click **Login**. A successful login places you on your Home Tab.

A failed login shows an error message. Please correct any errors and try again. If you cannot log in, please contact your system administrator.

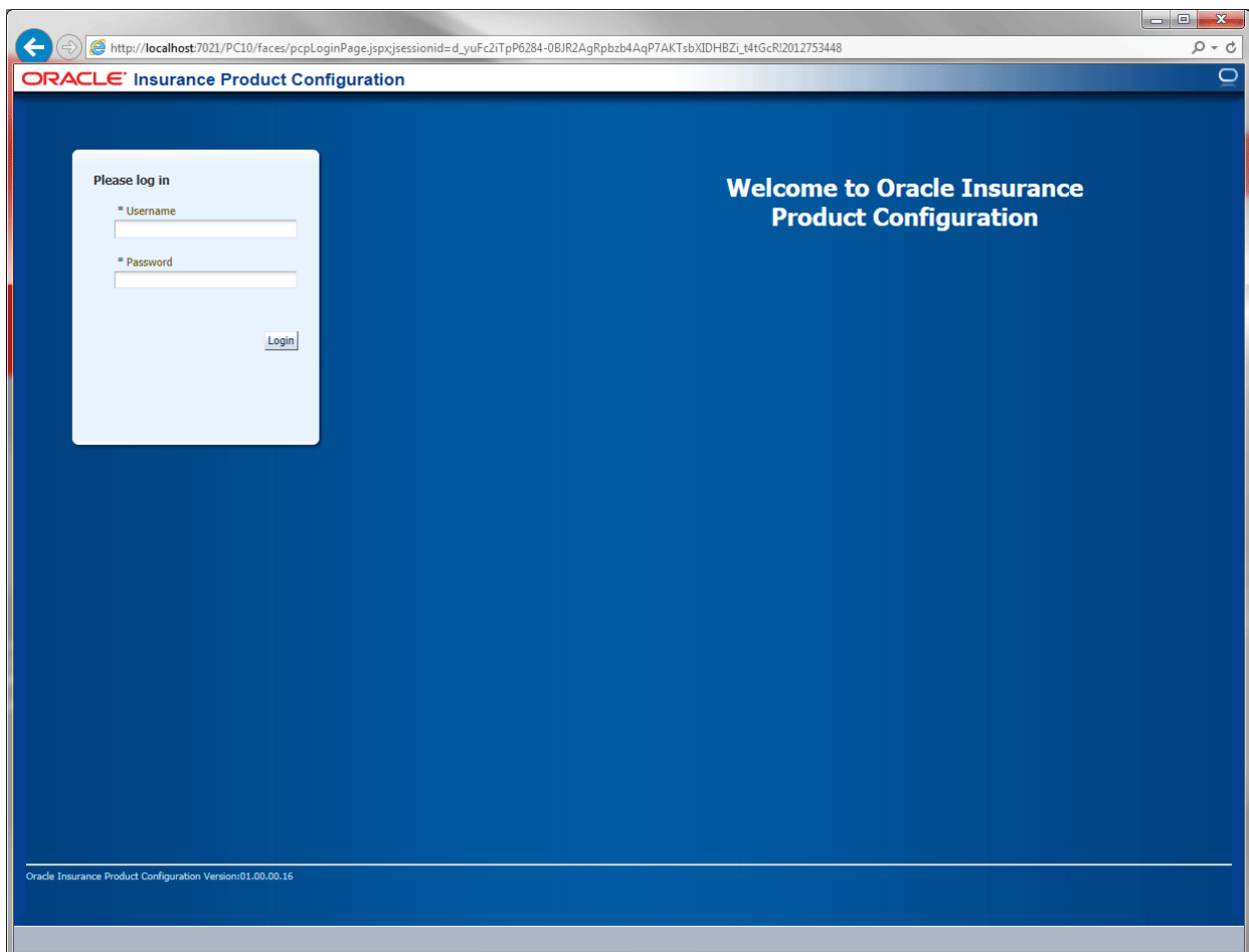


Figure 3 Product Configuration Log In

Help Logging In

If you have forgotten your password, username or need assistance with logging into the system, please contact your system administrator.

NOTE: *Username and passwords cannot be updated in Product Configuration. If you require an update to your username and password, please contact your system administrator.*

Logging Out

Logging out disconnects you from Product Configuration. To log out, click Logout in the top menu bar.

Rights:

Product Configuration uses rights to allow users access to various areas. The type of rights you have determines what you can view, edit, add or delete. There are three types of rights:

- **No Access:** you cannot enter this area. The fields are grayed out or not displayed.
- **User Access:** you can view, edit, add or delete information where applicable.
- **Administrator Access:** you can view, edit, add or delete information where applicable including administrator features.

The system administrator sets group rights. If there is an area you cannot enter or edit and you think you need access, please contact your System Administrator.

PREPARATION FOR CREATING A PRODUCT

Data preparation is a crucial element in minimizing the amount of time it will take to create a product, as well as determining how easily the product can be maintained. Doing prep work allows for better utilization of the application.

You can design a hierarchy of definitions that can be used across multiple products. Think about the commonalities across those products and group those at a higher level than the products themselves.

Hierarchy in PC

Domains contain all the reusable content that can be used to create Product Object Models. A single Domain Inheritance Tree is used to define that reusable content. Multiple Product Object Models (POM) and multiple versions of those models can be created from a single Domain Inheritance Tree. Each time a POM version is created, an implicit copy of the Domain Inheritance Tree (or domain model) is kept which reflects the state of the domain model at that point in time. Users can explicitly create versions of the entire Business Domain which will include the domain model and related POM versions.

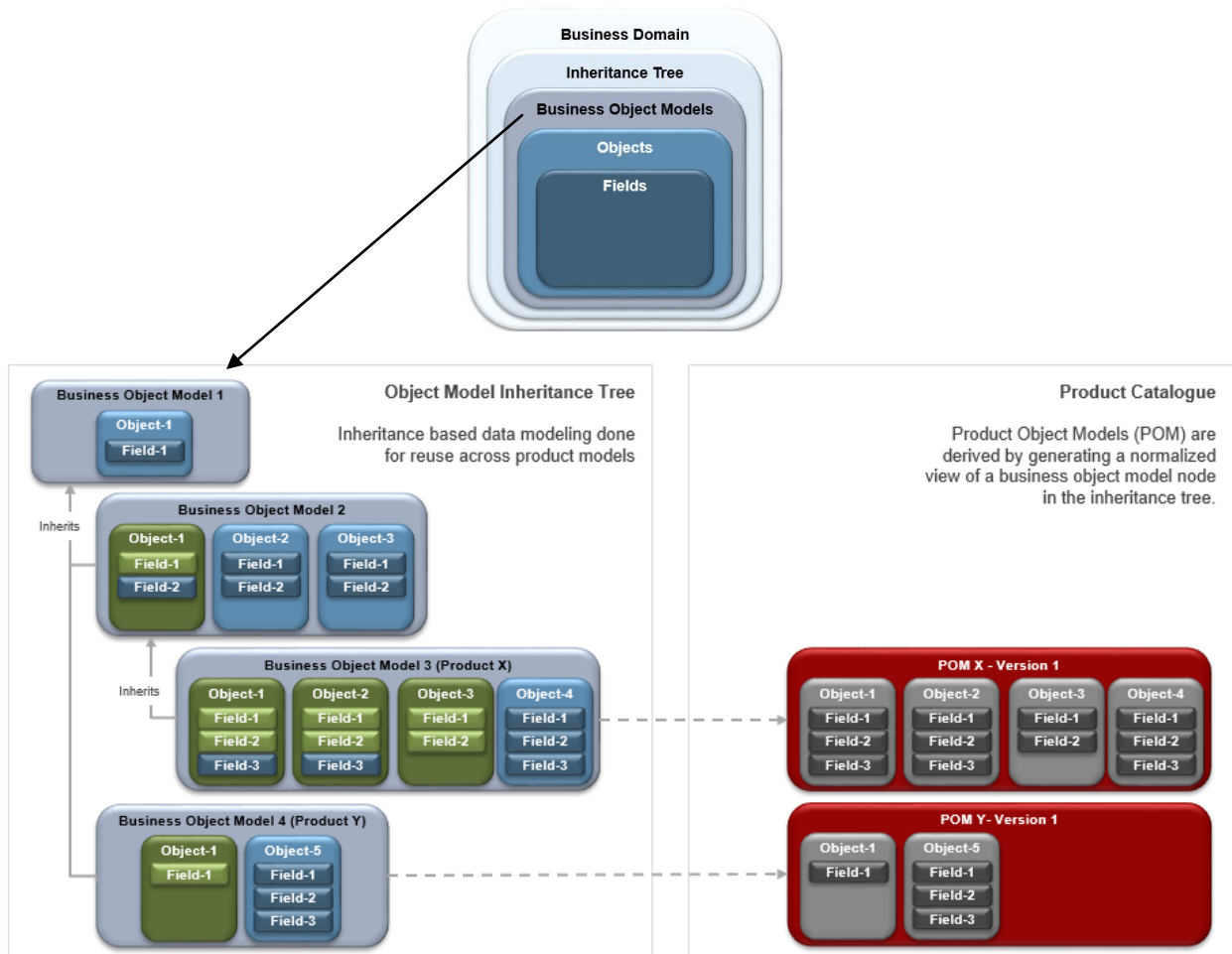


Figure 4 Model of a Business Domain Hierarchy

PRODUCT CONFIGURATION

Product Configuration involves three phases:

- Domain Management
- Business Modeling
- Product Implementation

Domain Management is the setup phase that establishes a framework where the product meta-data is created, managed, and versioned. A domain is a user defined boundary for a collection of reusable related content. Business object models are created and managed within domains. Defined content cannot be shared across domains.

In Business Modeling, objects, fields, data types, and parent/child relationships are developed and managed. Once that content is ready for release, it can be packaged and made available for Project Implementation.

Project Implementation is where you publish your product models to integrated tools.

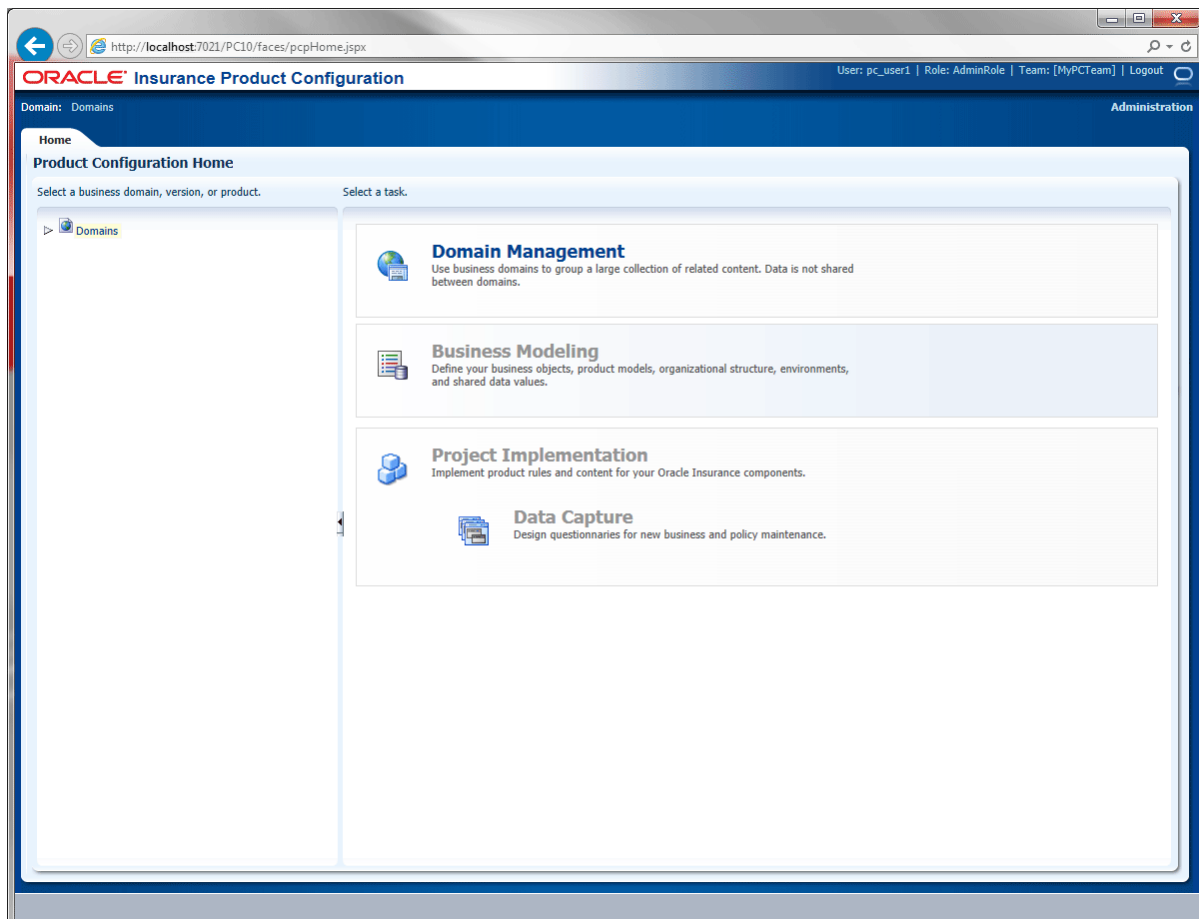


Figure 5 Product Configuration Home Page

From the Home page you can navigate to one of the main components of Product Configuration:

- **Domain Management**
- **Business Modeling**
- **Project Implementation**

NOTE: If Approval Workflow is enabled, then the Worklist Management option will be displayed.

HOME PAGE

A successful login places you on the *Home page*. The home page lists existing domains, business models, and product object models in an expandable tree on the left. Depending on the selected domain, business model, or product object model, tasks on the right are enabled or disabled. The first time you enter the home page, the Default Domain content is available.

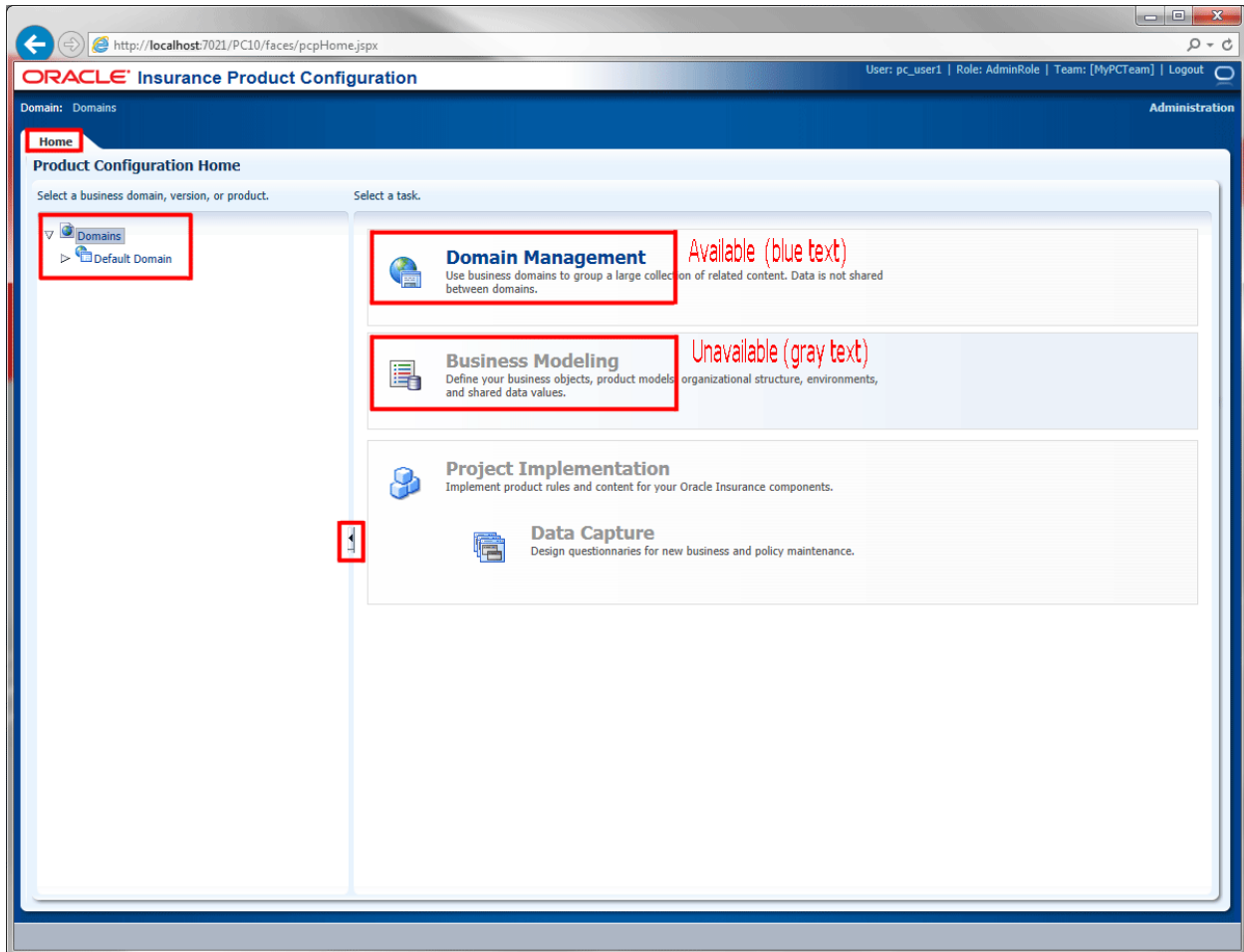






Figure 6 Selecting a Domain

Navigating PC

The left side of the screen lists existing domains, domain versions or product object models in an expandable tree. To view a domain, business model or product model, click the arrow in front of the item to expand it or collapse it.

Navigation Icons:

Expand and close icons are available on many pages.

	Options are hidden. Click to expand and view options.
	Options are expanded. Click to hide options and remove from viewing.
	Left side pane is open. Click to hide and remove from viewing.
	Left side pane is closed. Click to expand and view options.

The left side of the screen can be collapsed by clicking the icon on the side of pane. This creates a larger work space in the right pane.

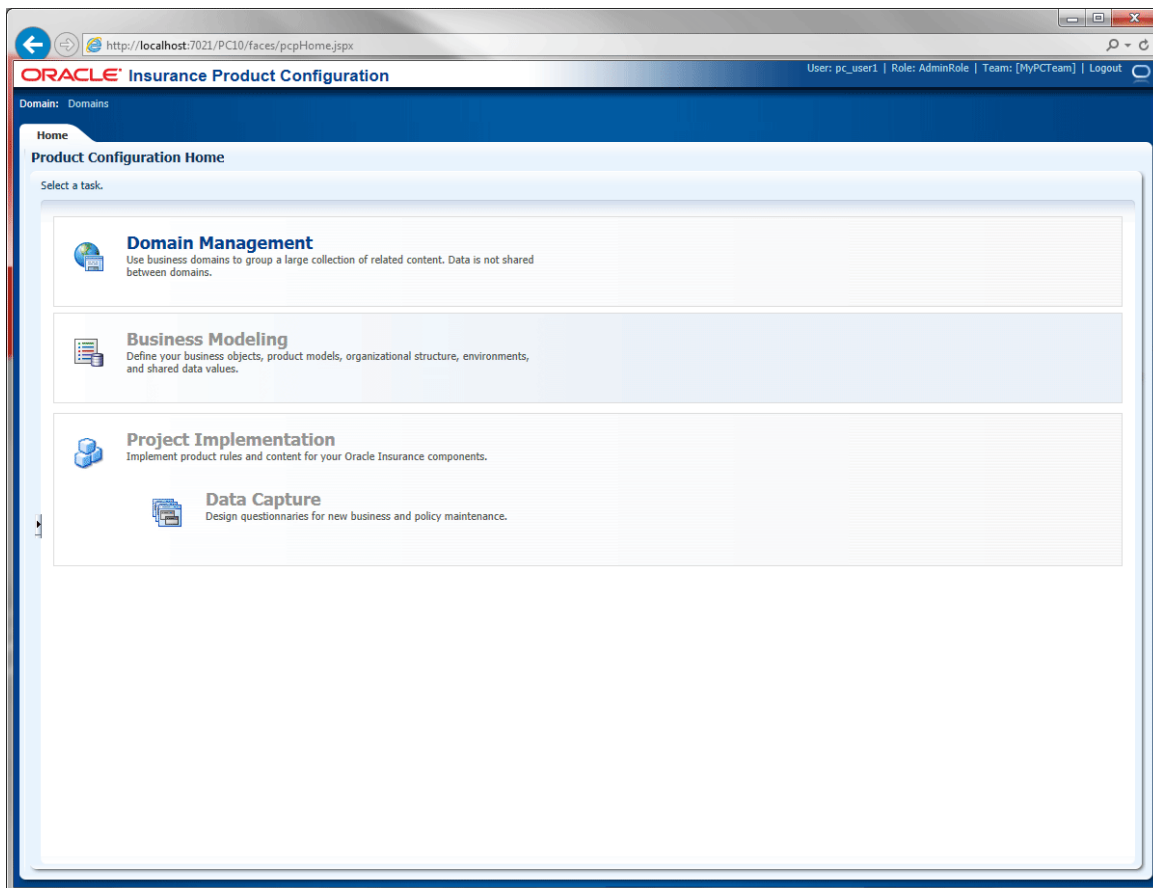


Figure 7 Full Pane View

To select the area where you want to work, expand the menu tree on the left. When you select an option, the available choices will change color and be presented with an underline when the mouse cursor hovers over the option.

Color Indicators:

Color indicators are throughout PC. The text color indicates if the option is available or unavailable. If an option is blue in color, it is accessible. If the option is grayed out, it is not available. The availability of an option may depend on the selection in the left.

For example, if you select a domain, the only option you will have is Domain Management. If you select a business model, you will be able to access Business Modeling or Domain Management. If you select a product object model version, you will be able to access Product Implementation, Business Modeling or Domain Management.

Domain Management	Available options are in blue text. Click to access.
Business Modeling	Unavailable options are in gray text. Grayed out options cannot be accessed.

Upper Screen Information:

An information bar at the top of the screen is available to every page within PC. The domain where you are currently located and the domain version are displayed in the upper left of the screen. The information bar includes:

- **User:** The name of the current user.
- **Role:** The role the current user has.
- **Team:** The team the current user belongs to.
- **Logout:** Logs out the current user.
- **Administration:** If you have administrator privileges, the Administration link is displayed. Click to access the administration options.

Tables:

Many workspaces have a table view. The table allows you to select the columns you want to view or hide, and Reorder the columns. Some additional options may also be available. For example, you can select to have Query by Example displayed.

To see the available options, click the down arrow on the View button and the menu is displayed.

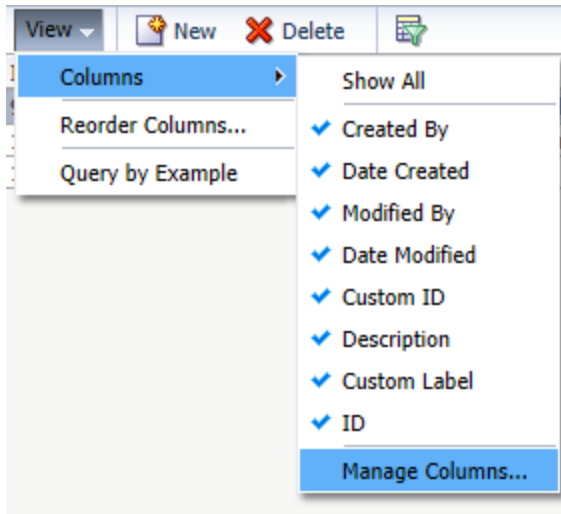


Figure 8 Table View Option

You can select the columns you want to view by placing a checkmark in front of the column name. Uncheck a column name to remove that column from the display.

Reorder columns brings up the Manage Columns option.

Managing Columns:

Managing columns allows you to select the columns you want to view, hide the columns you do not want to see and reorder the viewable columns.

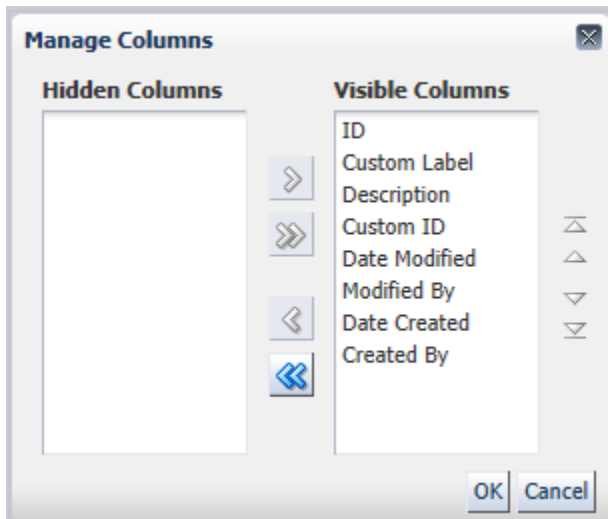


Figure 9 Manage Columns

Use the arrows to move the columns from Visible to Hidden or to restore hidden column to being visible. Select the column that you want to move and click the arrow.

To reorder visible columns, select the column that you want to move up or down and click the arrows to the side. When you are finished, click OK to save you selections.

Table Icons:

Many tables allow for the freezing of column width and the wrapping of text within a table. These options apply to the entire column of the table. To select a column, click the column header.

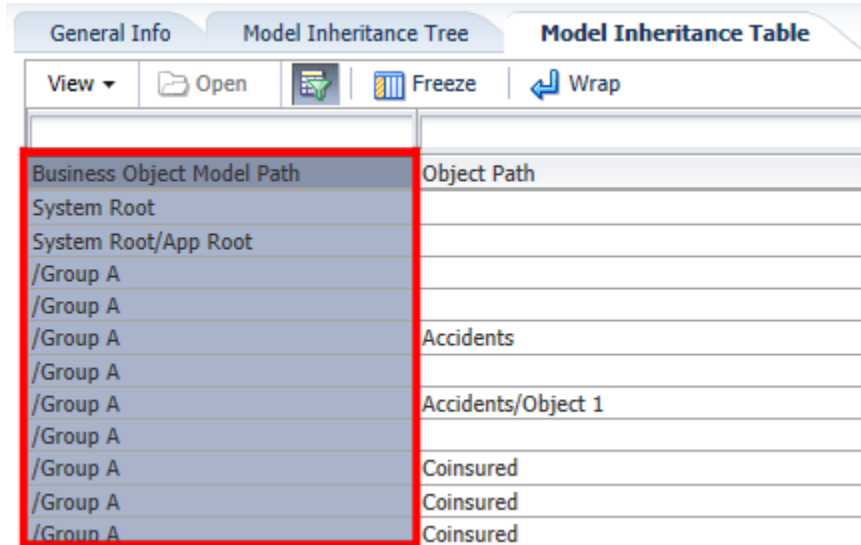






Figure 10 Table Columns

The icons indicating the option can be applied are available after you select the column. Once the option has been applied, the icon color changes.

 Freeze	Freeze available. Freezes the column width. This option cannot be applied to the right-most column.
 Wrap	Wrap available. Wraps the text within every cell of the column.
 Freeze	Freeze remove. You can select a column and unfreeze the column only, or click the button and unfreeze all columns in the entire table.
 Wrap	Wraps remove. Select the column and click the button to remove the wrap.

Notes:

Many workspaces have a Notes option. Notes are optional entries that allow for comments to be added to an object. Notes can be added at any time. When you enter your note, you will be able to type a note in directly or you can paste a note in from an outside source.

Special characters are allowed and attachments can be added to notes. Attachments include MS Word doc files, MS Excel files, and Adobe Acrobat PDFs.

When an element has a note attached, the notes icon changes. 

Notes stay within PC and do not get carried out with the product. Notes are visible to any PC user.

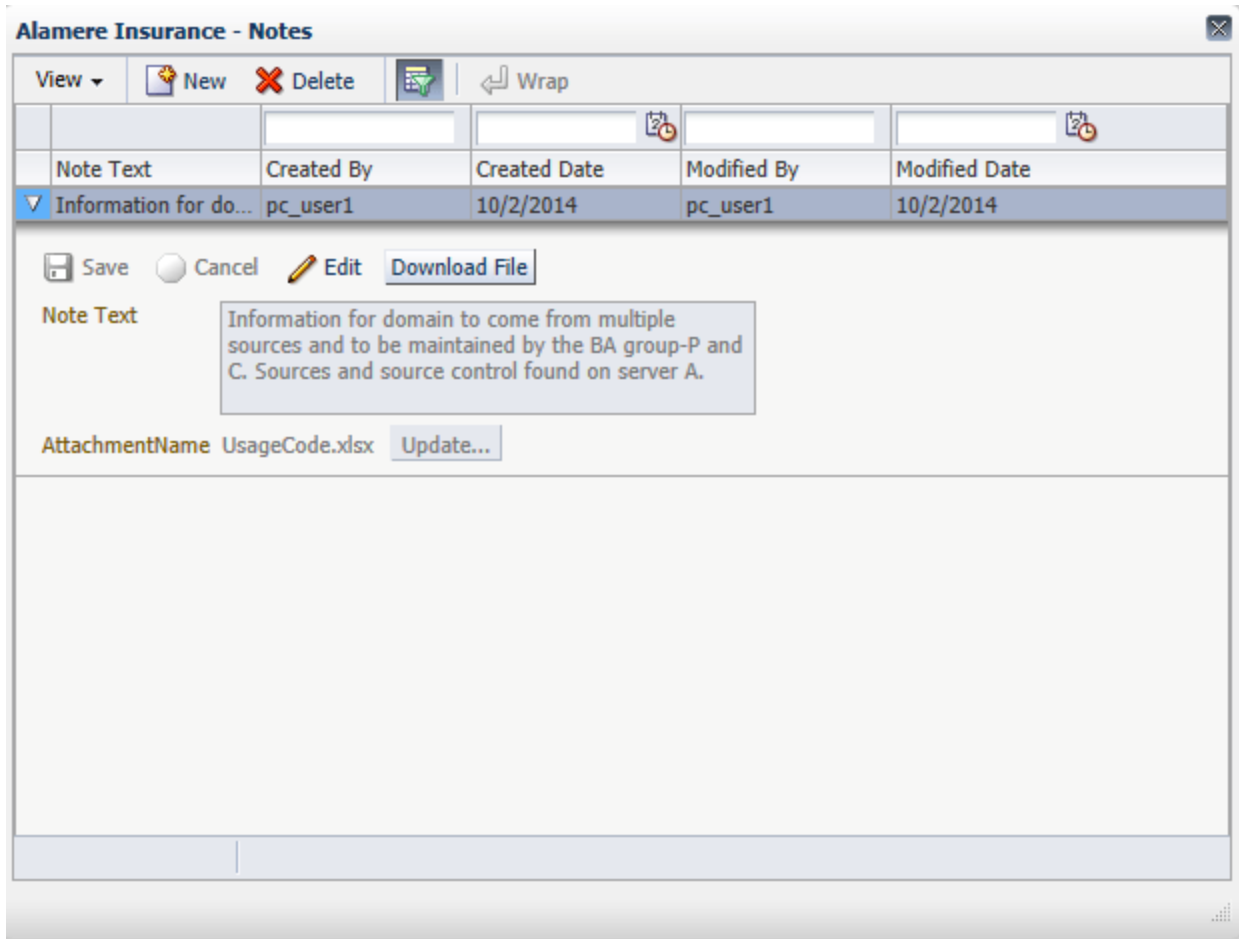


Figure 11 Notes

Adding a Note:

1. From the Notes screen, click New. The New Notes screen is displayed.
2. Enter the note.
3. Click Save to save your note.
4. You are returned to the main Notes screen. Your note is listed.

Notes can be collapsed and expanded using the arrow at the front of the note.

The screenshot shows a window titled "Alamere Insurance - Notes". At the top, there is a toolbar with "View", "New", "Delete", and "Wrap" buttons. Below the toolbar is a table with the following columns: "Note Text", "Created By", "Created Date", "Modified By", and "Modified Date". The table contains one row with the following data: "pc_user1", "10/2/2014", and empty cells for "Note Text", "Modified By", and "Modified Date". Below the table, there are buttons for "Save", "Cancel", and "Edit". A "Note Text" label is followed by a large text input field. Below that, an "AttachmentName" label is followed by a text input field and a "Browse..." button.

Note Text	Created By	Created Date	Modified By	Modified Date
	pc_user1	10/2/2014		

Figure 12 Entering a New Note

Editing a Note:

Notes can be edited at any time.

1. Select the note you want to edit and click the edit button.
2. Make your changes and click save when complete.

Deleting a Note:

Notes can be deleted at any time.

1. Select the note you want to delete and click the delete button.
2. The note is removed immediately.

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

Query by Example:

Many workspaces have a Query by Example option. Query by Example allows you to enter a value in the empty field at the top of the column and do a search for the value entered.

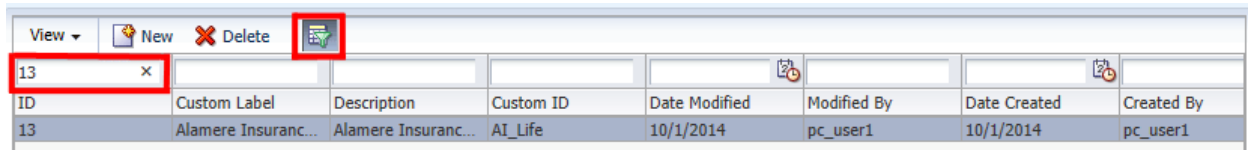



Figure 13 Query by Example

1. Select the column where you want to search and enter the value you want to search on in the field at the top of the column
2. Hit Enter on your keyboard.
3. Search results are returned underneath.

If the fields are not visible at the top of the column, click the Query by Example  icon in the top menu. The search fields will be presented.

You also can click the Query by Example icon to remove the search fields.

Some View menus also contain a Query by Example option. Click the option to add search fields to columns.

DOMAIN MANAGEMENT

From the Home page navigate to Domain Management. Select the domain where you want to work. If you need to create a new domain, select the default domain and click Domain Management in the Domain Listing area to the right.

Domain Management is the first part of creating a business model. Domains can be simple or complex, hold numerous business objects or only a few. It is up to the designer. A domain acts as a container for related objects. The objects can be grouped by product such as line of business, or by territory, or by any designation.

Domain is the top-level or root container of one or more business object models. These can represent any number of lines of business or products. In product configuration terms, it is a hierarchical collection of object definitions. All items defined within a domain are available only in that domain. Objects cannot be shared between domains.

There are two areas on the Domain Management page: a domain listing on the left side of the screen and a detail view on the right side.

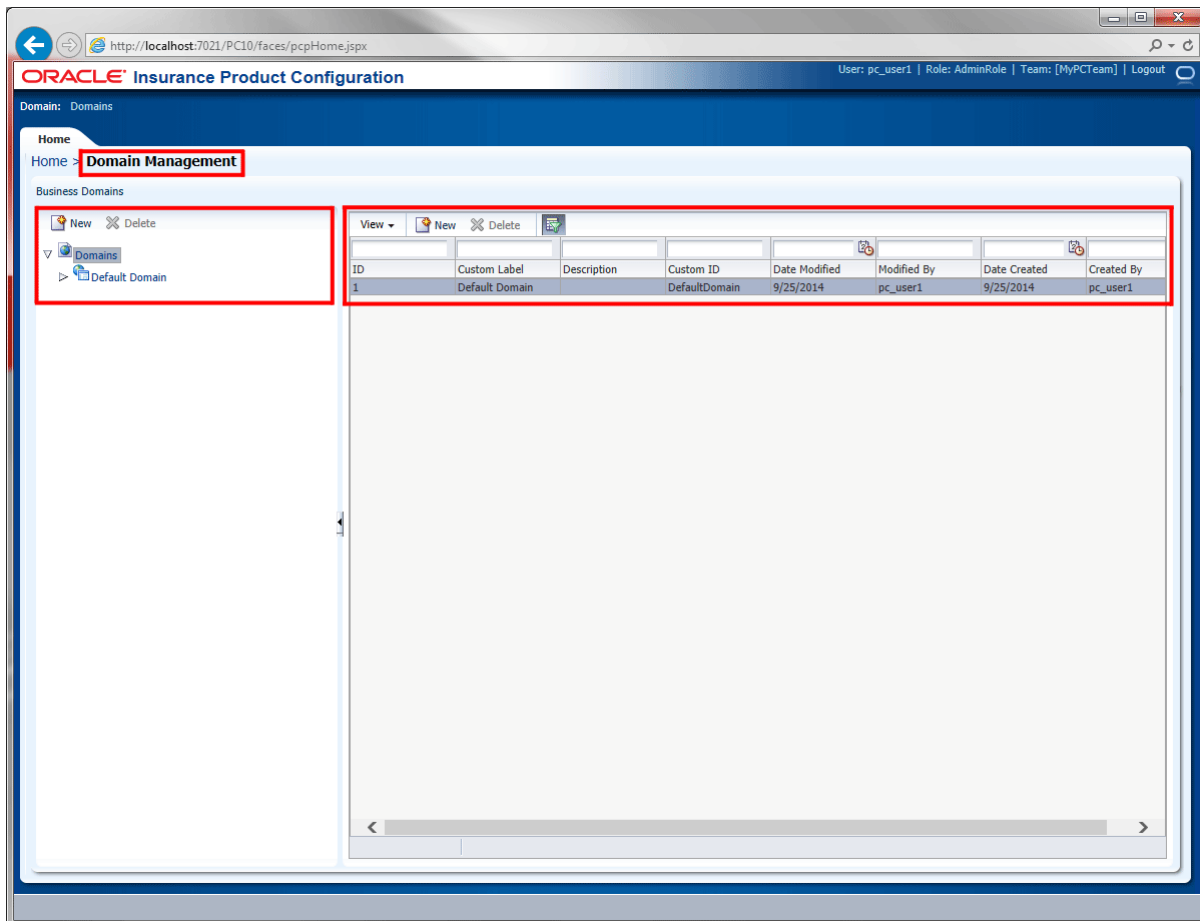


Figure 14 Domain Management – Domain Listing

When the Domains container node is selected the right side detail view displays a table view list of all domains, including domain details ID, Custom Label, Description, Custom ID, Date Modified, Modified By, Date Created, and Created By.

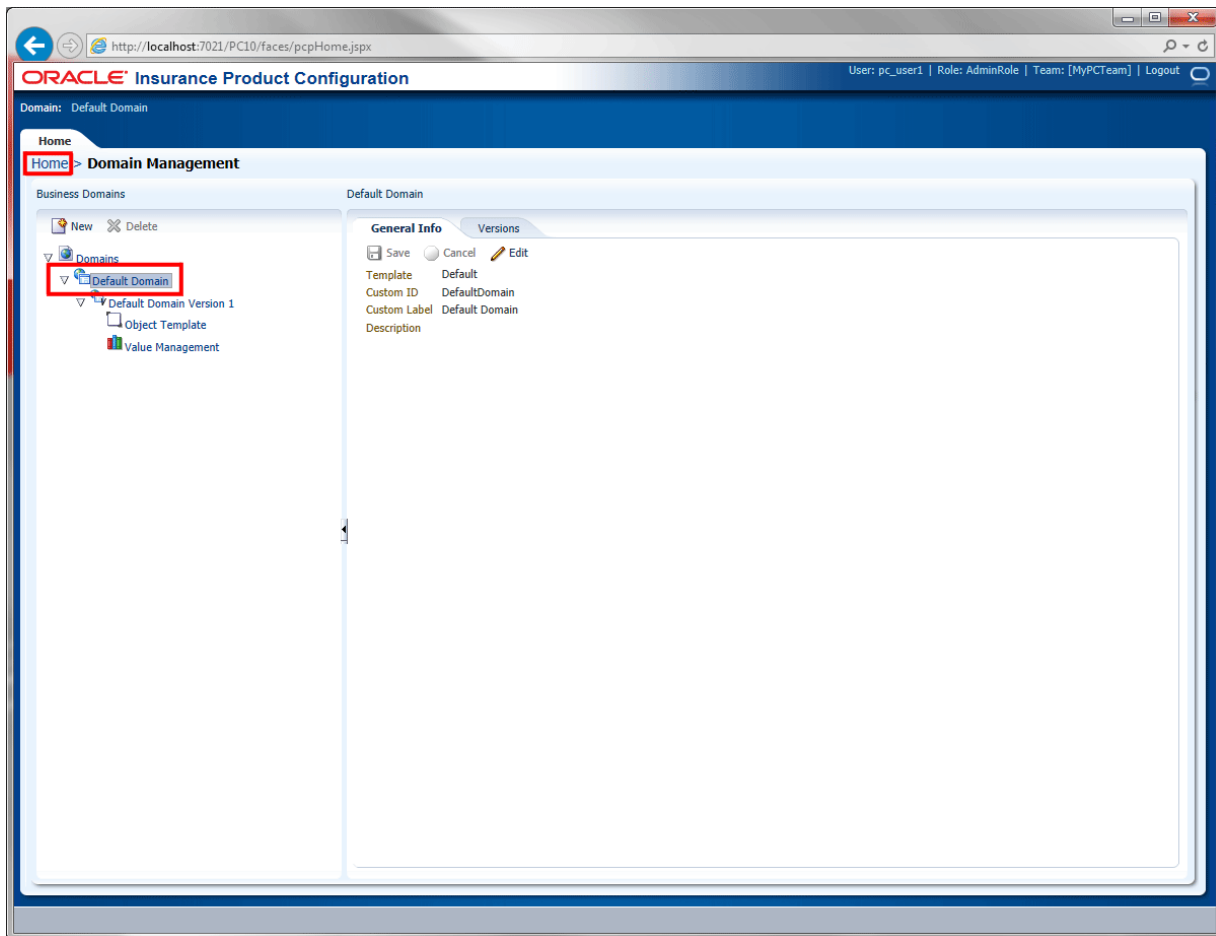


Figure 15 Domain Management – Domain Details

When a specific domain is selected, the right side detail view displays two tabs.

- **General Info:** The Domain Template, Custom ID, Custom Label, and Description.
- **Versions:** A list of domain versions, including version details ID, Version Label, Implementation Status, Date Created, Created By, Description, Modified By, Date Modified.

Default Domain:

When you enter PC for the first time, a default domain is presented. The default domain is system defined and contains minimal objects and fields. The default domain can be edited (renamed).



You can use the default domain as the starting point for model definition or you can create a new domain. You are not required to use the default domain, it is optional.

DOMAIN MANAGEMENT FUNCTIONALITY

The Domain Management page has menu options located at the top of each view or listing section.

Domain Listing Options:

The domain listing is the expandable menu on the left.

	Creates a new domain.
	Deletes the selected domain.

General Info Tab

The General Info tab displays information for the currently selected domain. The information can be edited at any time.

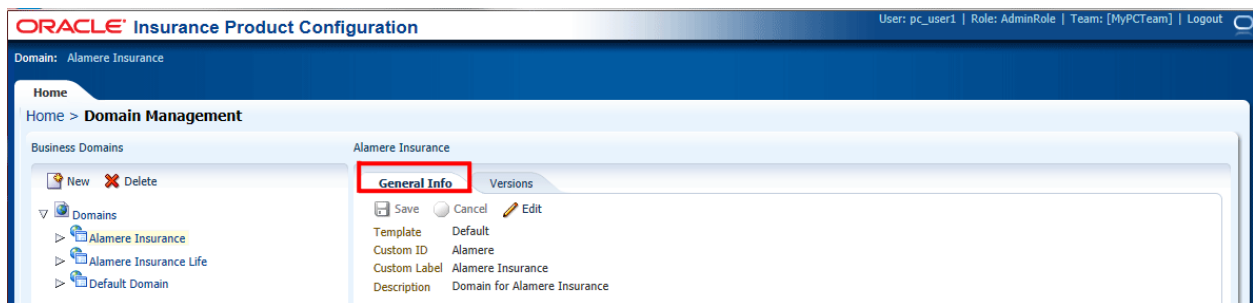





Figure 16 General Info Tab for Domain

Domain Detail General Info Options:

The domain general info tab contains the domain details on the right.

	Saves the domain.
	Cancels the domain edit action.
	Opens the edit screen for updates.

Fields:

Template	The type of domain to be use.
Custom ID	A user-defined unique alpha-numeric identifier. Must begin with an alpha character.

	IDs can be up to 65 characters.
Custom Label	A user-defined unique name. Name can be up to 65 characters, any combination of alpha numeric or special characters are allowed.
Description	A user-defined domain description or definition. Descriptions can be up to 250 characters, any combination of alpha numeric or special characters are allowed.

Versions Tab

The Versions tab lists the versions for the currently selected domain. The information can be edited at any time. A list of domain versions, including version details ID, Version Label, Implementation Status, Date Created, Created By, Description, Modified By, Date Modified.

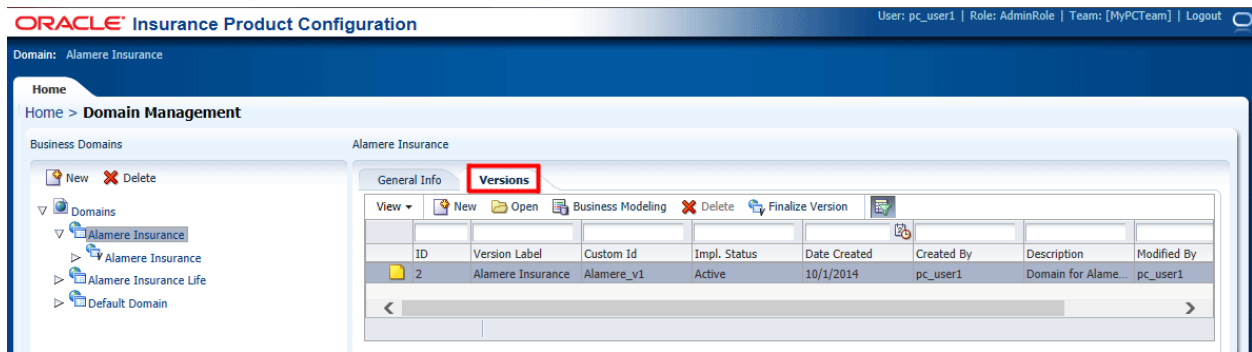


Figure 17 General Info Tab for Domain

Domain Detail Versions Options:

The domain version tab contains the version details of the selected domain on the right.

	Creates a new domain version.
	Opens the selected business object model
	Opens the business model for the selected domain version.
	Deletes the selected domain version.
	Finalizes product object model version.

Version Fields:

ID	The system-defined numeric identifier. This is an information field only and cannot be changed
----	--

Version Label	A user-defined unique label. Label can be up to 80 characters, any combination of alpha numeric or special characters are allowed.
Custom ID	A user-defined unique alpha-numeric identifier. Must begin with an alpha character. IDs can be up to 80 characters.
Impl. Status	Status of the domain version. The default status is active. The status can be updated to Finalized when the Finalize Version button is clicked.
Date Created	Date of creation.
Created By	Lists the user who created the domain.
Description	This is the user-defined version description or definition. Descriptions can be up to 300 characters, any combination of alpha numeric or special characters are allowed.
Modified By	Lists the user who did the last modification. If the field is blank, it has not been modified.
Date Modified	The date of the last modification. If the field is blank, it has not been modified.

CREATING A NEW DOMAIN

The General Info tab is where new domain properties are defined.

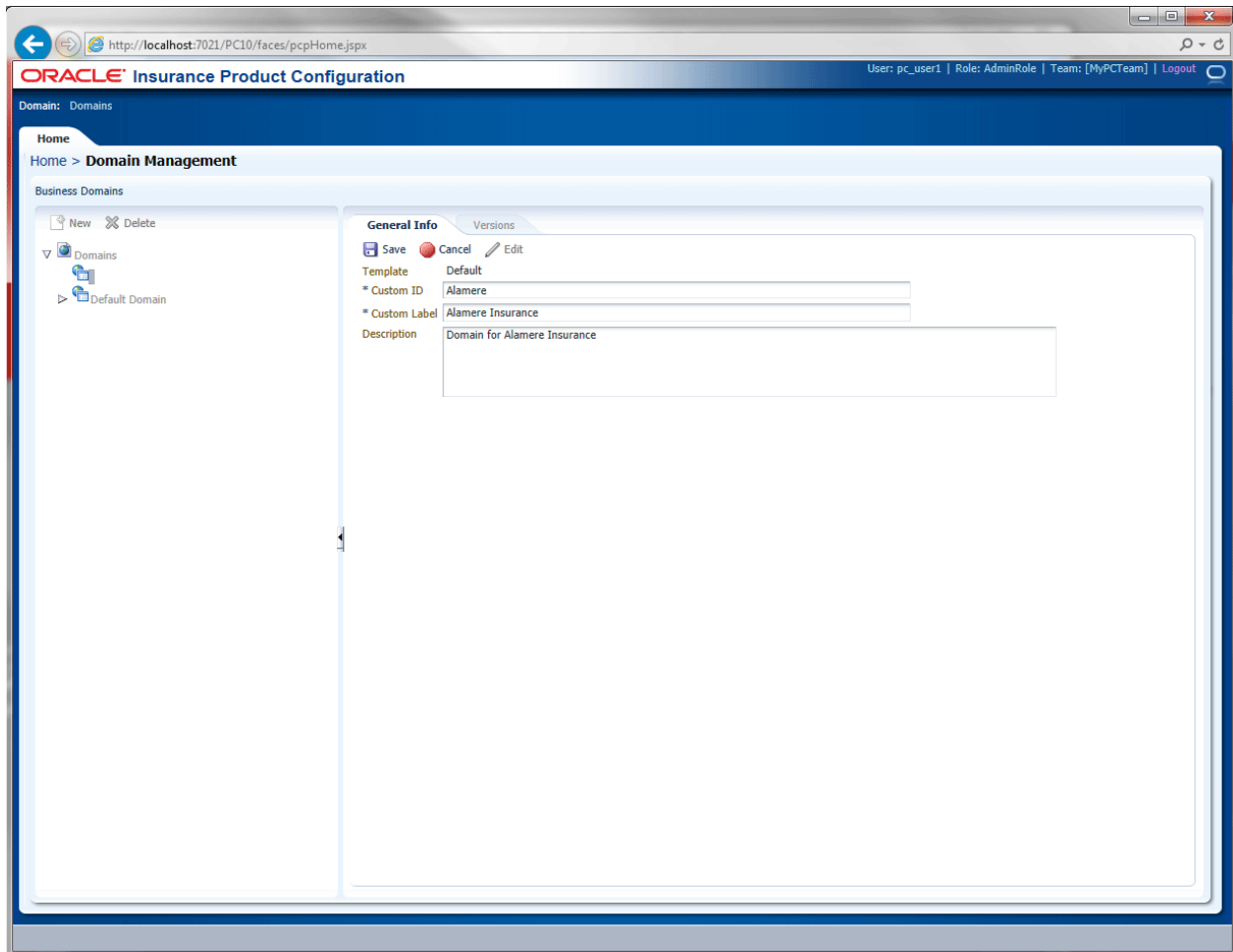


Figure 18 Creating a New Domain

1. In the domain listing area on the left, click New. The General Info tab on the right displays the blank fields for the new domain.
2. The Template is completed for you. The template is Default.
3. Enter a Custom ID. Custom IDs must start with an alpha character and should not contain spaces or special characters with the exception of underscore (_).
4. Enter a Custom Label. This is a user created friendly label.
5. Enter a Description.
6. Click Save to save your entry.

If this is not the action you want to take, click Cancel to close the screen without saving any information.

Editing a Domain

Domain information can be edited at any time. The template field is fixed and cannot be changed.

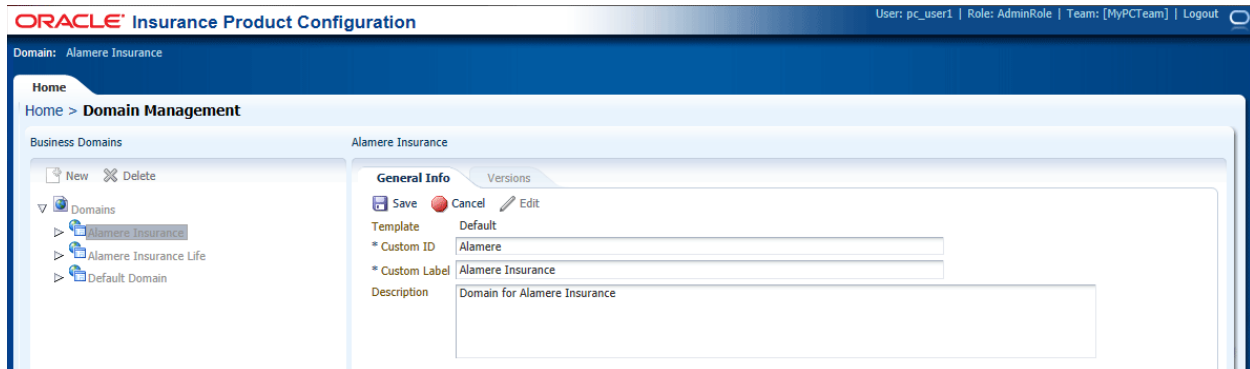


Figure 19 Editing a Domain

1. In the domain listing area on the left, select the domain you want to edit.
2. In the domain details on the right, click Edit. The General Info tab refreshes with the fields that are open for editing.
3. Make your changes.
4. Click Save to save your entry.

If this is not the action you want to take, click Cancel to close the screen without saving any information.

Deleting a Domain

Domains can be deleted.

1. In the domain listing area on the left, select the domain you want to delete.
2. Click Delete. **No warning is given.** The domain is removed immediately. Make sure this is the action you want to take.

If this is not the action you want to take, click Cancel to close the screen without saving any information.

DOMAIN VERSIONS

The Version tab is where new domain versions are created. The Versions tab lists the versions for the currently selected domain. Version information can be edited at any time.

A domain version is either in an Active or Finalized state. Active versions are working versions that are open for editing. Finalized versions are closed and cannot be changed. This means none of the finalized versions contained data, including BOMs, Products, Value Maps, Templates, Notes, etc., can be edited.

A new domain version is created from a finalized domain version and is a sibling of the finalized version. At the time of creation, the new version is an exact copy of the finalized version. The new domain version is open for editing.

Versions created in this manner are built upon each other, where each new version is likely to contain the same objects as the previous versions.

The advantage to creating a domain version sequentially is that the domain version where the new version was created has been finalized and may not require much editing.

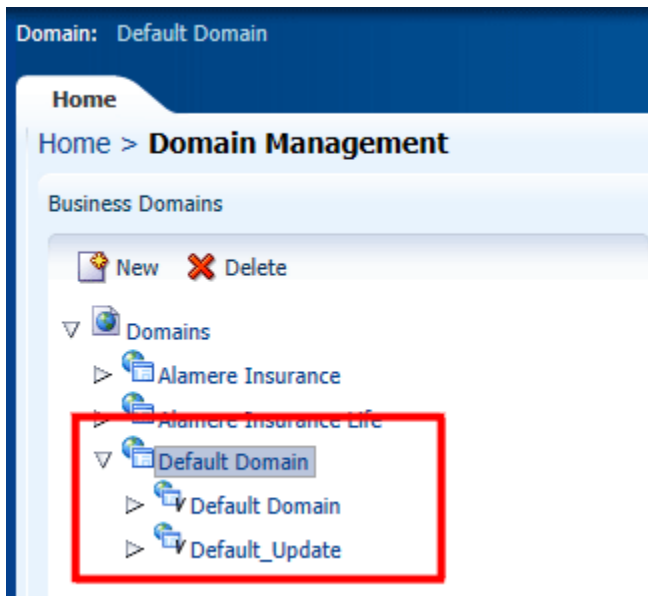


Figure 20 Sequential Versions

CREATING A NEW DOMAIN VERSION

A new domain version is created from a finalized domain that serves as the base for the version.

1. Select the domain where you want the new domain version to be created. Navigate to the Versions tab, click New. Or you can select the domain version where you want a new domain version to be created. Click New in the domain listing area on the left. The General Info tab displays the blank fields for the new domain version.

The screenshot shows the Oracle Insurance Product Configuration interface. The top navigation bar includes the Oracle logo, the text 'Insurance Product Configuration', and user information: 'User: pc_user1 | Role: AdminRole | Team: [MyPCTeam] | Logout'. Below this, the breadcrumb 'Home > Domain Management' is visible. The main content area is titled 'Business Domains' and features a left-hand navigation tree with 'Domains' expanded to show 'Alamere Insurance', 'Object Template', 'Value Management', 'Alamere Insurance Life', and 'Default Domain'. The 'New' button is highlighted. The main panel displays the 'General Info' tab for a new domain version, with a toolbar containing 'Save', 'Cancel', 'Edit', 'Business Modeling', and 'Finalize Version'. The form fields include:

- * Custom ID: A text input field.
- * Version Label: A text input field.
- Description: A large text area.
- Effective Date: A date picker.
- Version Status: A dropdown menu currently set to 'Active'.

Figure 21 Creating a New Domain Version

2. Enter a Custom ID. Custom IDs must start with an alpha character and should not contain spaces or special characters with the exception of underscore (_).
3. Enter a Version Label. This is a user created friendly label.
4. Enter a Description.
5. Enter or select an Effective Date.
6. The Version Status is fixed as active.
7. Click Save to save your entry. The entry screen closes and the new version is listed.

If this is not the action you want to take, click Cancel to close the screen without saving any information.

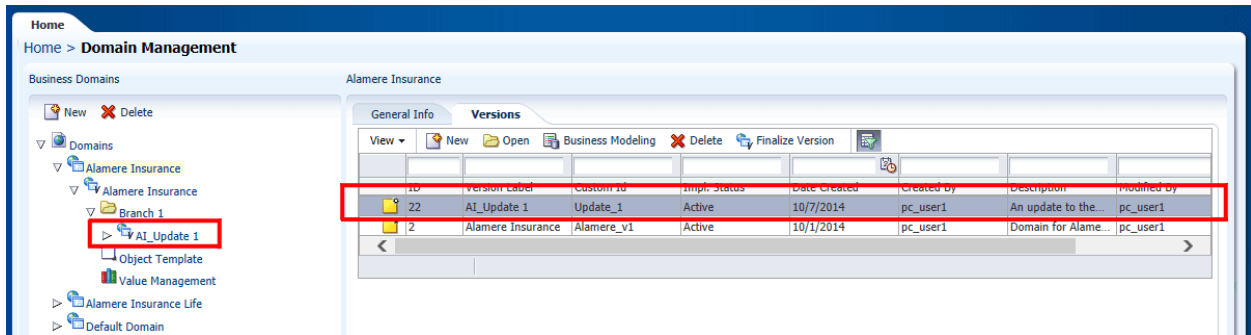


Figure 22 New Branched Domain Version Listing

Editing a Domain Version

Domain information can be edited at any time. The template field is fixed and cannot be changed.

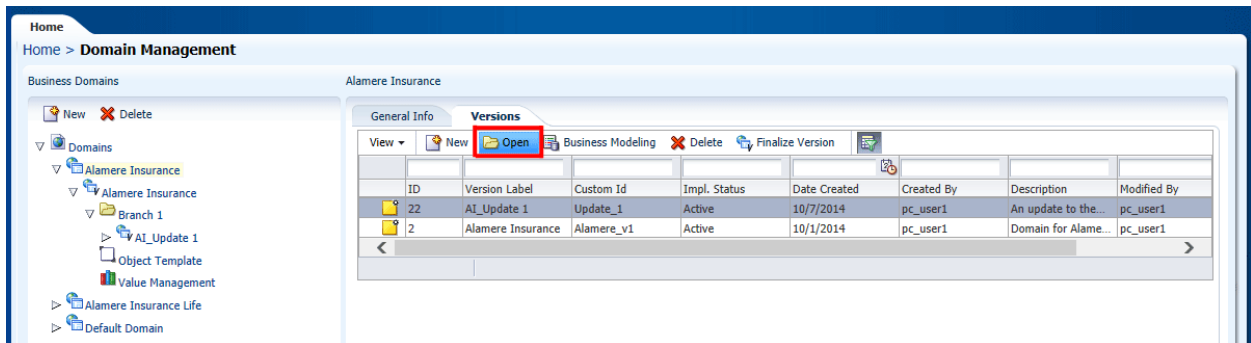


Figure 23 Editing a Domain Version

1. Select the domain you want to edit from the table listing.
2. Click Open. The General Info tab is displayed.

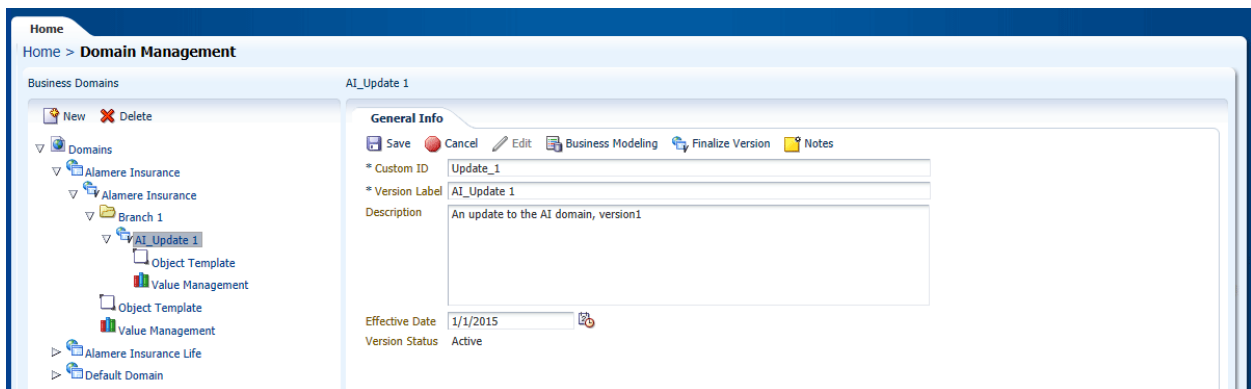


Figure 24 Editing a Domain Version form General Tab

3. Click Edit and the screen refreshes with the fields that are open for editing.

4. Make any change.
5. Click Save to save your entry.

If this is not the action you want to take, click Cancel to close the screen without saving any information.

Deleting a Domain Version

Domain versions can be deleted.

1. Select the version you want to delete.
2. Click Delete. **No warning is given.** The version is removed immediately. Make sure this is the action you want to take.

If this is not the action you want to take, click Cancel to close the screen without saving any information.

BUSINESS MODELING

In Business Modeling, reusable meta-data (objects, fields, and parent/child relationships) is developed and managed. Once that content is complete, it can be released and made available for Product Implementation.

A domain created in Domain Management is a prerequisite to Business Modeling. A domain is a collection of related content that holds elements unique to the domain.

Domain version is the top-level or root container of one or more business object models. It is similar to line of business but intends to be a more generic, user-definable grouping. In product configuration terms, it is a collection of object definitions. All items defined within a domain are available only in that domain. Objects cannot be shared between domains

A business object model contains related objects. For example the Personal Lines BOM may contain Home, Auto and Umbrella sub-BOMs as well as Policy, Insured and Address objects that are shared among all the sub-BOMs.

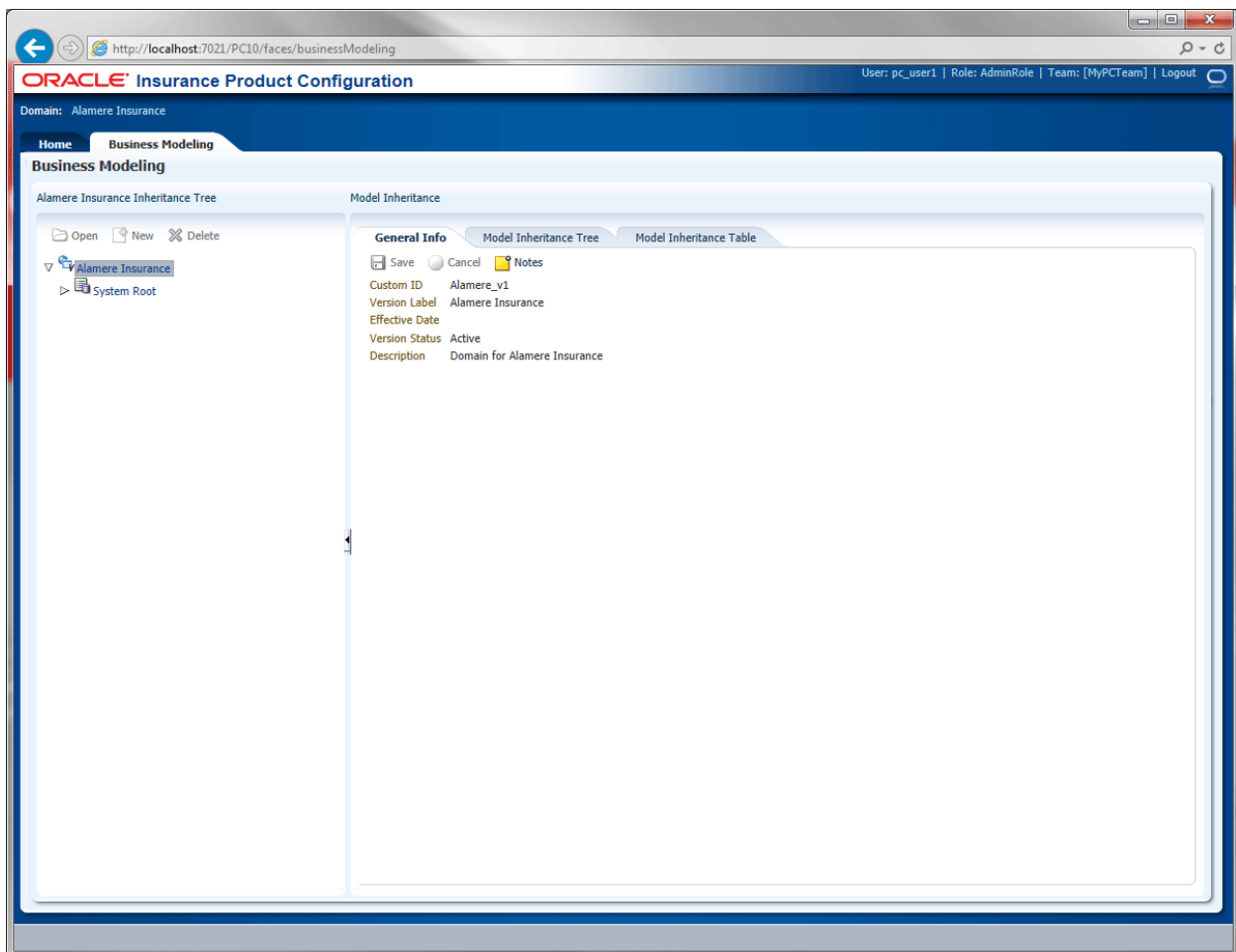


Figure 25 Business Modeling

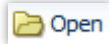


There are two areas on the Business Modeling page:

- **Component Listing** on the left side of the screen
- **Detail View** on the right side.

The component listing area includes the top-level node, which is the selected domain version, as well as its business object models and product object models.

Component Listing Functionality

The Component Listing on the left has three menu options. Option availability depends upon the object selected. Not all menu options are available to every object.

	Opens the selected business object model. Not available when Domain Version is selected.
	Creates a new business object model. Not available when Domain Version or System Root is selected.
	Deletes the selected business object model. Not available when Domain Version, System Root, or App Root is selected.

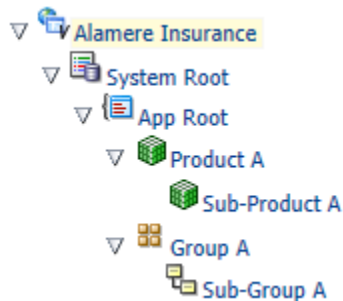
Availability depends upon the object selected:

- System Root, App Root, Products, and Groups have the Open menu option available.
- App Root, Products, and Groups have the New menu option available.
- Products and Groups have the Delete menu option available.

Detail View Functionality


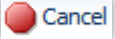


The content presented in the Detail View depends upon the object selected. For example:

- Domain Version
- System Root
- Application Root
- Product
- Sub-product
- Groups
- Sub-groups



Detail View General Info Options:

The Detail View general info tab menu options depend upon the object selected.

 Save	Saves the any changes made. Not available when Domain Version is selected.
 Cancel	Cancel the action. Not available when Domain Version is selected.
 Edit	Opens the edit screen for editing. Not available when Domain Version is selected.
 Notes	Opens the Notes screen.

- Every object has a General Info tab.
- Domains have a Model Inheritance Tree and a Model Inheritance Table
- Products and sub-products have a Version tab available.

The Business Modeling screens for open, editing, and creating new objects are explained later in the chapter.

DOMAIN VERSION

The top field for the Business Model is the Domain Version. When the Domain Version is selected, the right side detail view displays three tabs.

- **General Tab:** The identifying information for the domain version.
- **Model Inheritance Tree:** Displays a tree view listing of all defined and inherited business object models, objects and fields. Available when the Domain Version is selected.
- **Model Inheritance Table:** Displays a table view listing of all defined and inherited business object models, objects and fields. Available when the Domain Version is selected.

General Info Tab

The General Info tab displays information for the currently selected domain version. The information cannot be edited in Business Model, only in Domain Management.

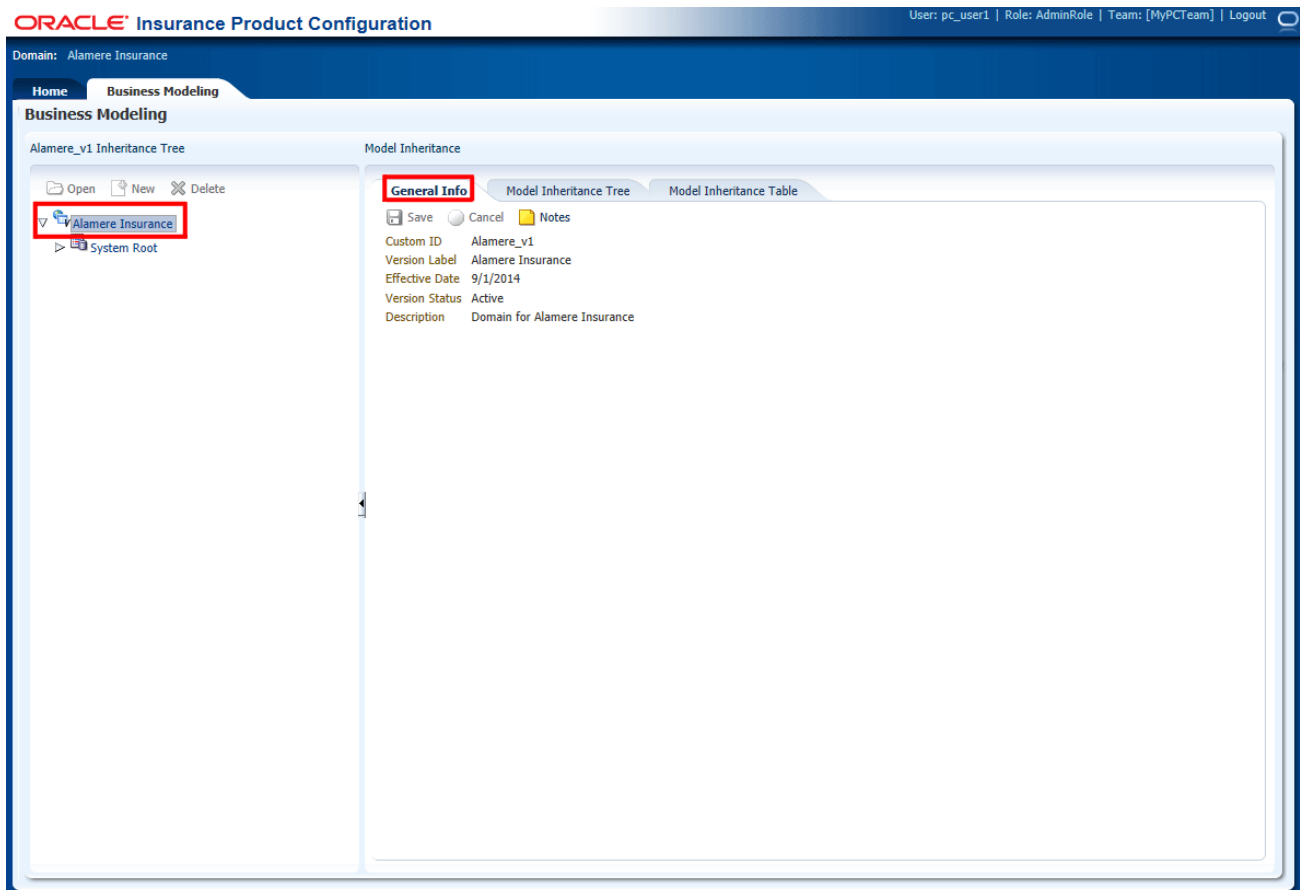


Figure 26 Business Modeling, Domain Version

Fields:

Custom ID	A user-defined unique alpha-numeric identifier. Must begin with an alpha character. IDs can be up to 80 characters.
Version Label	A user-defined unique label. Label can be up to 80 characters, any combination of alpha numeric or special characters are allowed.
Effective Date	The effective date.
Version Status	Status of the domain version. The default status is active. The status can be updated to Finalized when the Finalize Version button is clicked.
Description	This is the user-defined version description or definition. Descriptions can be up to 300 characters, any combination of alpha numeric or special characters are allowed.

Model Inheritance Tree

The Model Inheritance Tree tab displays Business Model definition properties in a tree for that can be collapsed. Available when the Domain Version is selected.

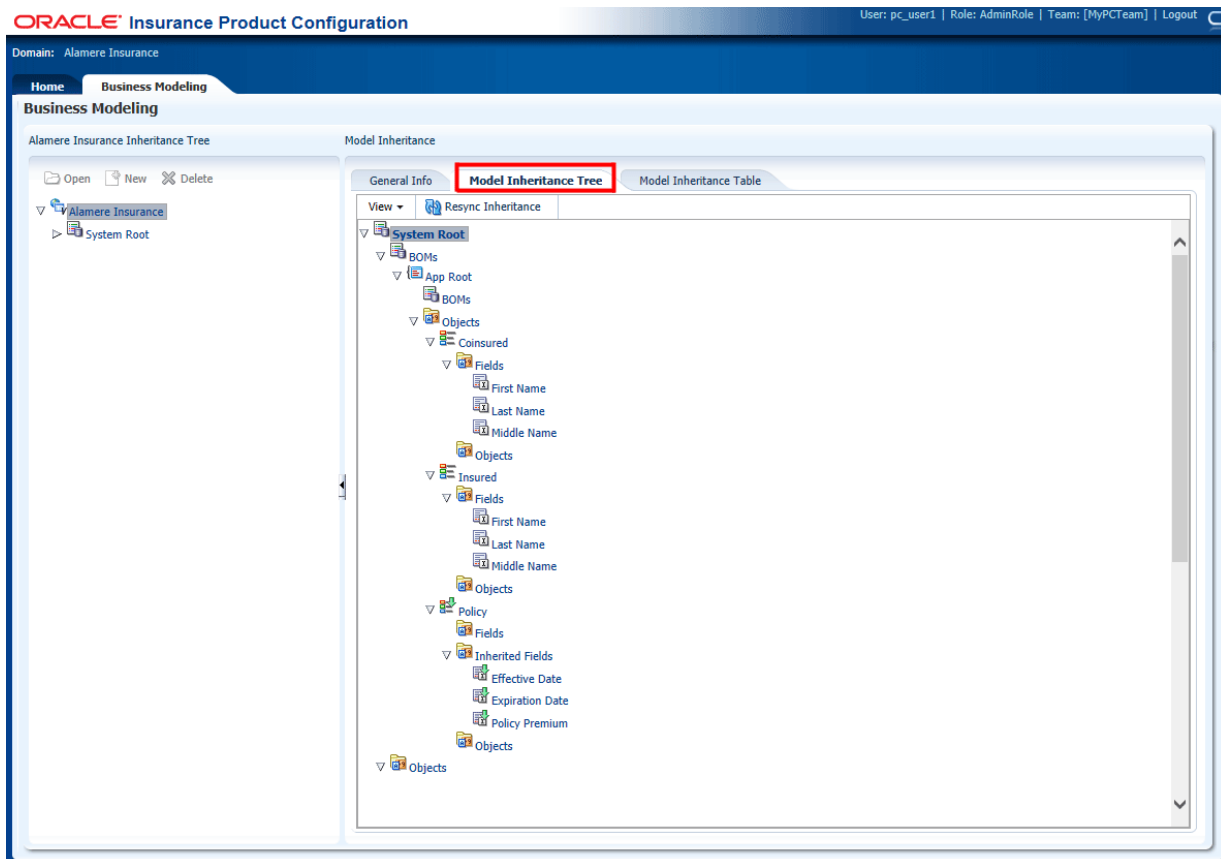


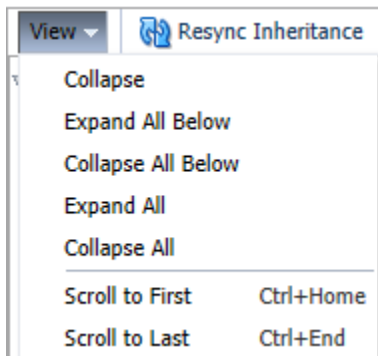
Figure 27 Business Modeling, Model Inheritance Tree

When a business object model is selected the right side detail view displays BOM definition properties.

Type	<p>This is the type of business object model</p> <ul style="list-style-type: none"> • Root – The SystemRoot node provides an anchor point where all definitions originate. System defined content and templates are provided here for general reuse or as needed by the system • AppRoot – The AppRoot node provides an anchor point for application specific model requirements and features. If an Oracle Insurance app requires specific objects to exist, then those can be defined here. Application specific content for general reuse will also be defined here. This node layer may not be present if there is no application specific content for the target app the user is intending to use. • ProductGroup – A ProductGroup node is an optional feature that provides a generic holding location for grouping products together. A ProductGroup node can be hierarchical and can define objects and fields. You cannot generate a product definition from a product group. • ProductSubGroup – A ProductSubGroup BOM type represents an optional secondary level of custom organization of Business Object Models (BOMs). • Product – Product node can represent an individual product, a packaged product or a product group. The Product node can hold objects that are unique to the product and have a sub product node. Any product that has sub products can serve as a group or a packaged product. You can generate a product definition from a product node.
Custom ID	This is the user-defined unique alpha-numeric identifier
Domain Version	The domain version where this business object model is defined

Navigating the Inheritance Tree:

The tree can be manipulated using the commands in the View menu.



The tree also can be refreshed using the Resync Inheritance button.

Model Inheritance Table

The Model Inheritance Table displays Business Model definition properties in a table format. Available when the Domain Version is selected.

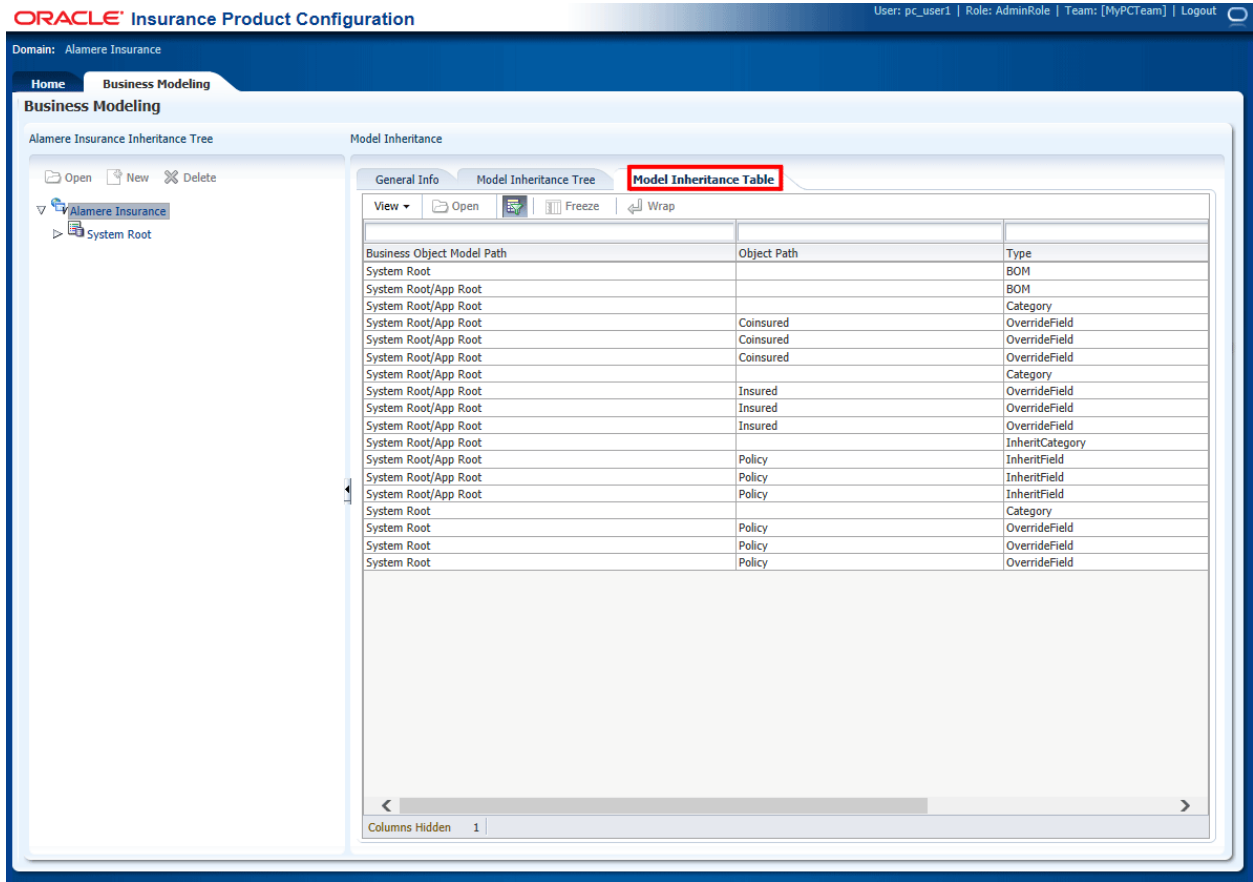


Figure 28 Business Modeling, Business Object Models Table

SYSTEM ROOT, APP ROOT, PRODUCTS, AND GROUPS

Under the Domain Version are the System Root, App Root, Products, and Groups. When any of these options are selected, the right side detail view displays the general information tab.

- **General Tab:** The identifying information for the selected option.

General Info Tab

The General Info tab displays information for the currently selected option. The information can be edited at any time.

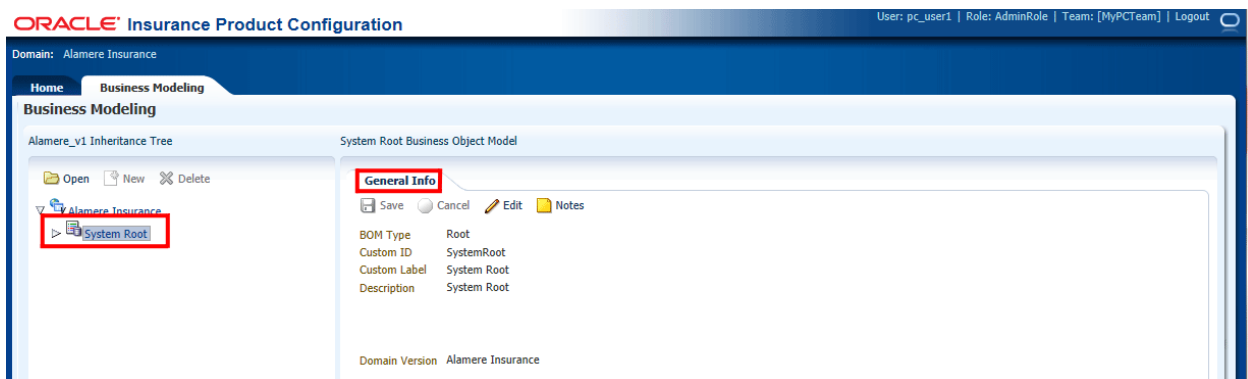


Figure 29 Business Modeling, System Root

Fields:

BOM Type	The field level of the option selected. This is a non-editable field.
Custom ID	A user-defined unique alpha-numeric identifier. Must begin with an alpha character. IDs can be up to 80 characters.
Custom Label	A user-defined unique label. Label can be up to 80 characters, any combination of alpha numeric or special characters are allowed.
Description	This is the user-defined version description or definition. Descriptions can be up to 300 characters, any combination of alpha numeric or special characters are allowed.

OPENING A BUSINESS MODELING OBJECT

Opening an object allows you to work on the objects within the object. On the Component Listing on the left:

- System Root, App Root, Products, and Groups have the Open menu option available.
- App Root, Products, and Groups have the New menu option available.
- Products, and Groups have the Delete menu option available.

Opening a Business Object Model:

1. On the Component Listing on the left, select the Business Object Model you want to open.
2. Click Open.
3. The object opens in the detail view area on the right. The first view is the General Info tab.

Expand the object to view or work on the object underneath.

Creating a New Business Object Model

The detail view on the right is where new Business Object Model properties are defined.

1. Click New. The detail view displays the blank fields for the new Business Object Model.
2. Select a Type
3. Enter the Custom ID.
4. Click Save to save your entry.

If this is not the action you want to take, click Cancel to close the screen without saving any information.

Editing a Business Object Model

1. Select the Business Object Model you want to edit.
2. Click Edit. The detail view refreshes with the fields open for change.
3. Make any change.
4. Click Save to save your entry.

If this is not the action you want to take, click Cancel to close the screen without saving any information.

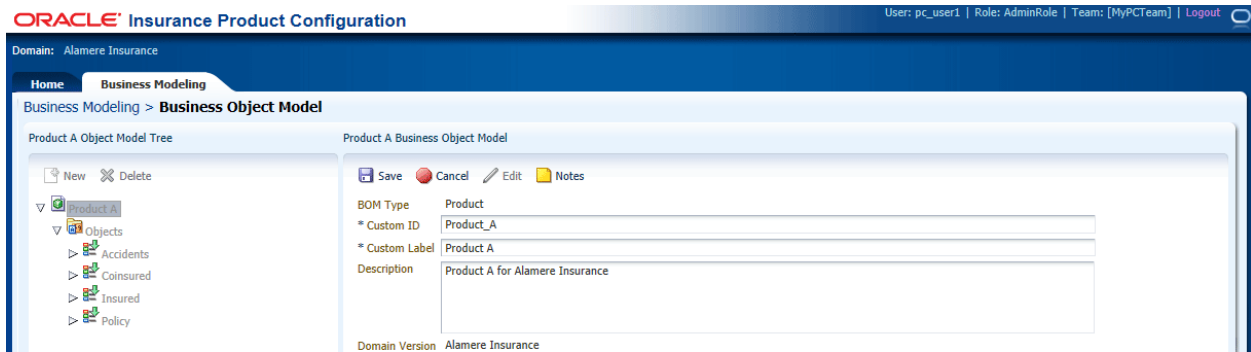


Figure 30 Business Modeling, New/Edit BOM

Deleting a Business Object Model

Business Object Models can be deleted.

1. Select the Business Object Model you want to delete.
2. Click Delete. **No warning is given.** The business object model is removed immediately. Make sure this is the action you want to take.

If this is not the action you want to take, click Cancel to close the screen without saving any information.

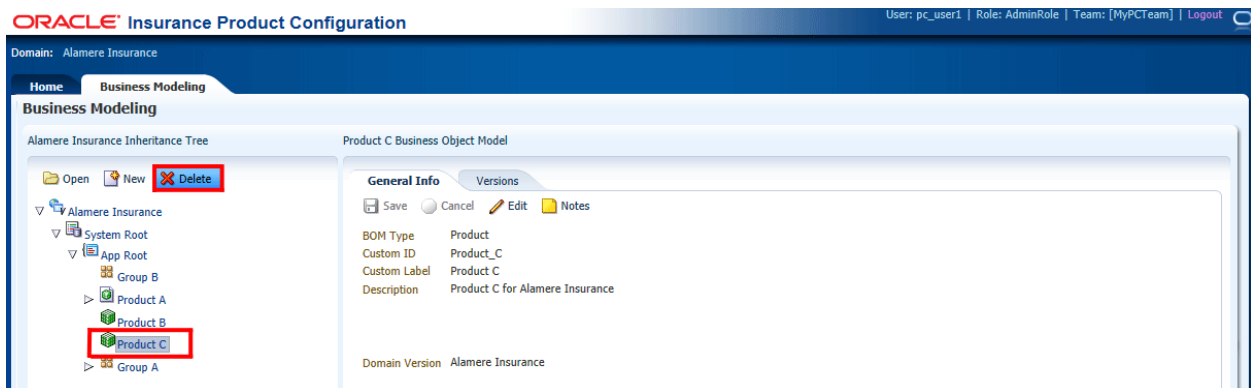


Figure 31 Business Modeling, Delete BOM

BUSINESS OBJECT MODEL

A business object model contains related objects. For example the Personal Lines BOM may contain Home, Auto and Umbrella sub-BOMs as well as Policy, Insured and Address objects that are shared among all the sub-BOMs.

The Business Modeling > Business Object Model page is where you define objects and fields specific to the currently open BOM.

There are two areas on the Business Modeling > Business Object Model page: the Business Object Model Tree listing on the left side of the screen and a detail view on the right side.

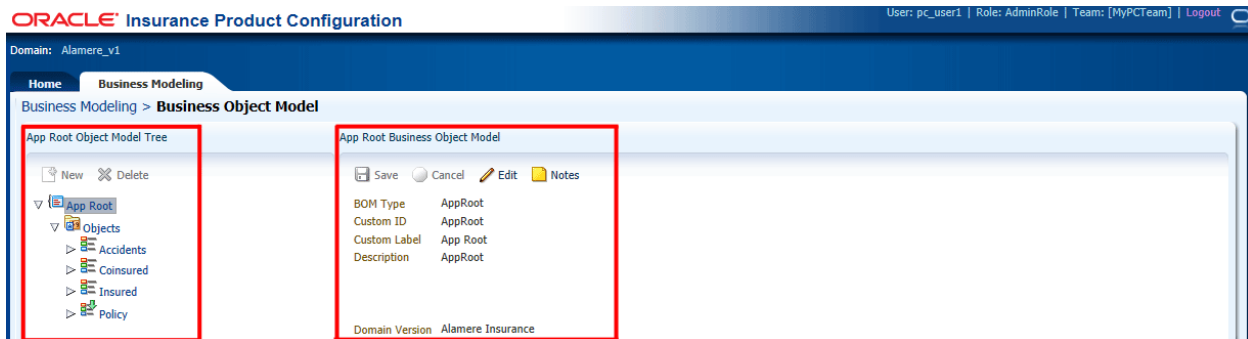










Figure 32 Business Object Model (open)

The Business Object Model Tree listing contains these elements.

- **Business Object Model (BOM)** : A business object model contains related objects. For example the Personal Lines BOM may contain Home, Auto and Umbrella sub-BOMs as well as Policy, Insured and Address objects that are shared among all the sub-BOMs.
- **Objects** : A container node in the BOM tree where each specific Object is defined.
- **Object** , : 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 Policy and Dwelling objects. Objects with the green down arrow icon are inherited from a parent BOM.
- **Fields** : A container node in the BOM tree where each specific Field is defined.
- **Inherited Fields** : A container node in the BOM tree where each specific Inherited Field is visible.
- **Field** , : A Field is a specific data item for the related object. For example, the Insured object may include fields for First Name, Middle Name, Last Name, Date of Birth, Age, Marital Status, Gender; the Address object may include fields for Address Line 1, Address Line 2, City, State, County, Postal Code and Country. Fields with the green down arrow icon are inherited from a parent BOM.

When the BOM is selected the right side detail view displays the BOM properties.

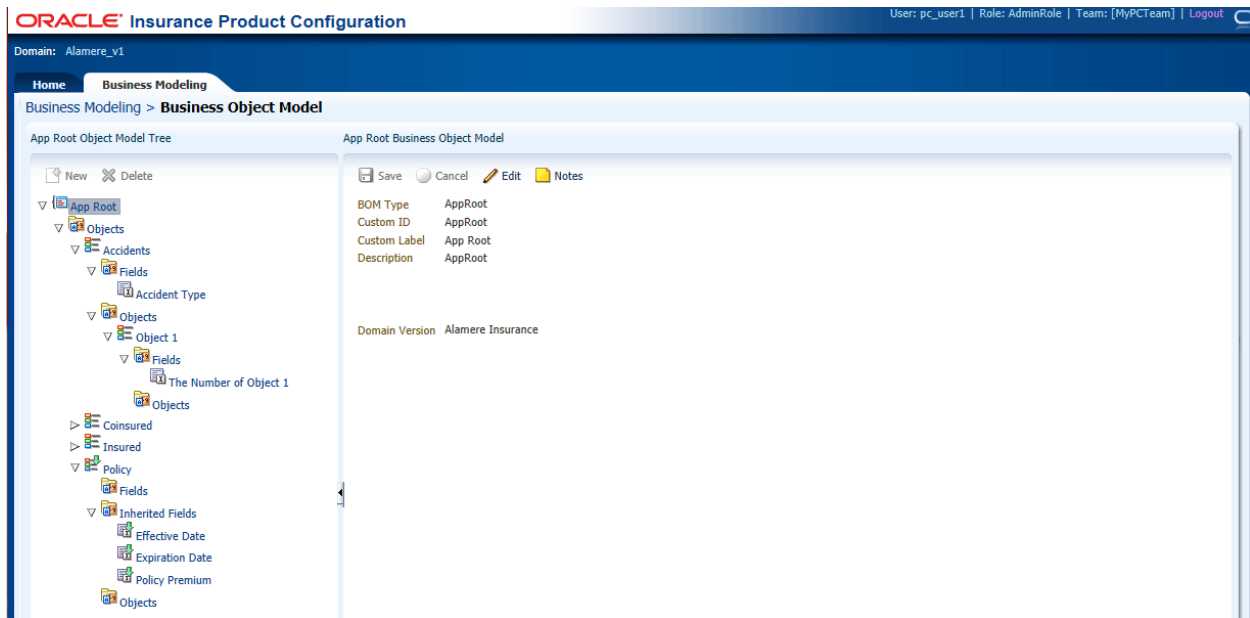


Figure 33 Business Object Model Tree, AppRoot BOM

OBJECTS

When the Objects container node is selected the right side detail view displays a table view listing of all objects defined at that level.

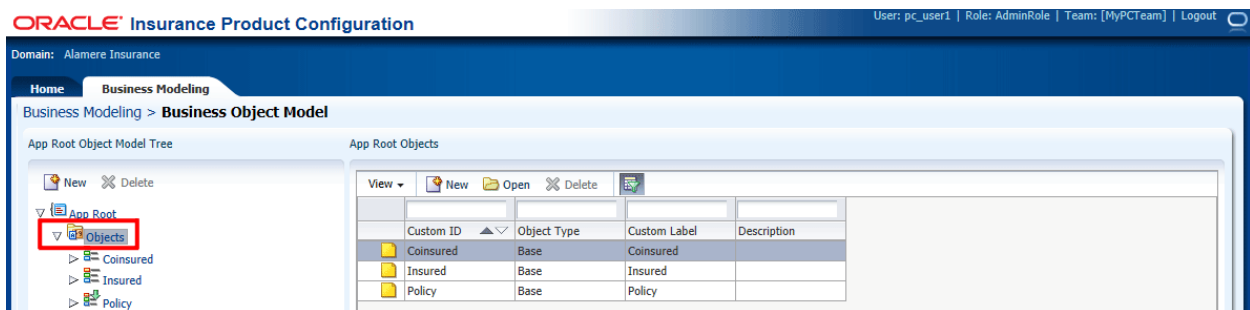



Figure 34 Business Object Model Tree, Objects

OBJECTS FUNCTIONALITY


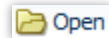


The Objects page has menu options located at the top of each view or listing section.

Business Object Model Tree Objects Options:

	Creates a new Object.
--	-----------------------

	Deletes the selected Object
---	-----------------------------

Objects Table Options:

	Creates a new Object.
	Opens the selected Object
	Deletes the selected Object
	Opens the Note dialog for the selected Object.

When an object is selected the right side detail view displays a general info tab, which includes the object properties Type, Template, Custom ID, Min Occurrences, Max Occurrences.

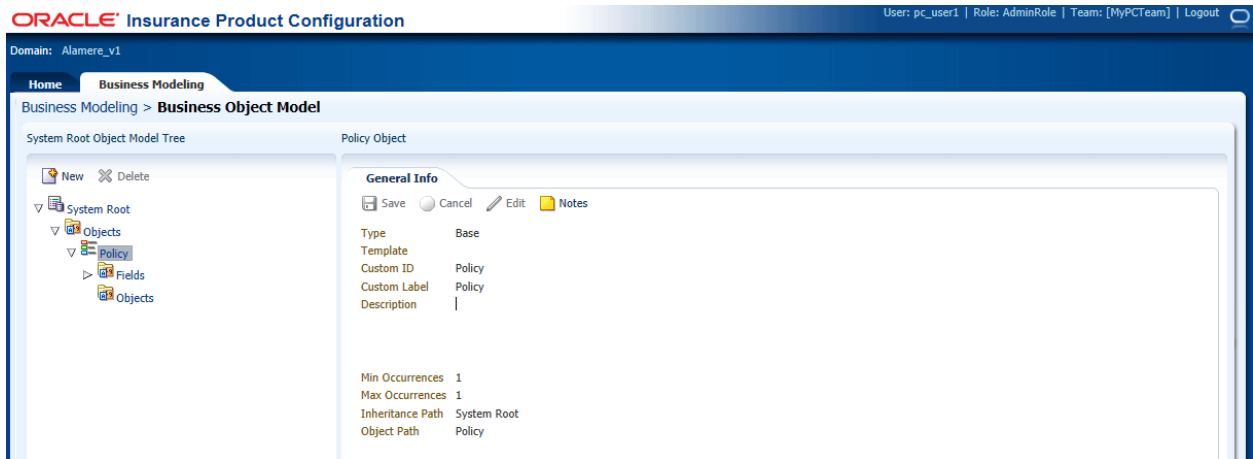

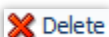


Figure 35 Business Object Model, Object


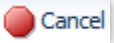


OBJECT FUNCTIONALITY

The Object page has menu options located at the top of each view or listing section.

Business Object Model Tree Object Options:

	Creates a new Object.
	Deletes the selected Object

Object Options:

	Saves the Object definition properties.
	Cancels the Object Edit action.
	Changes the selected Object to Edit mode.
	Opens the Note dialog for the selected Object.

Creating a New Object

The detail view is where new Object properties are defined.

1. Click New. The detail view displays the blank fields for the new Object.

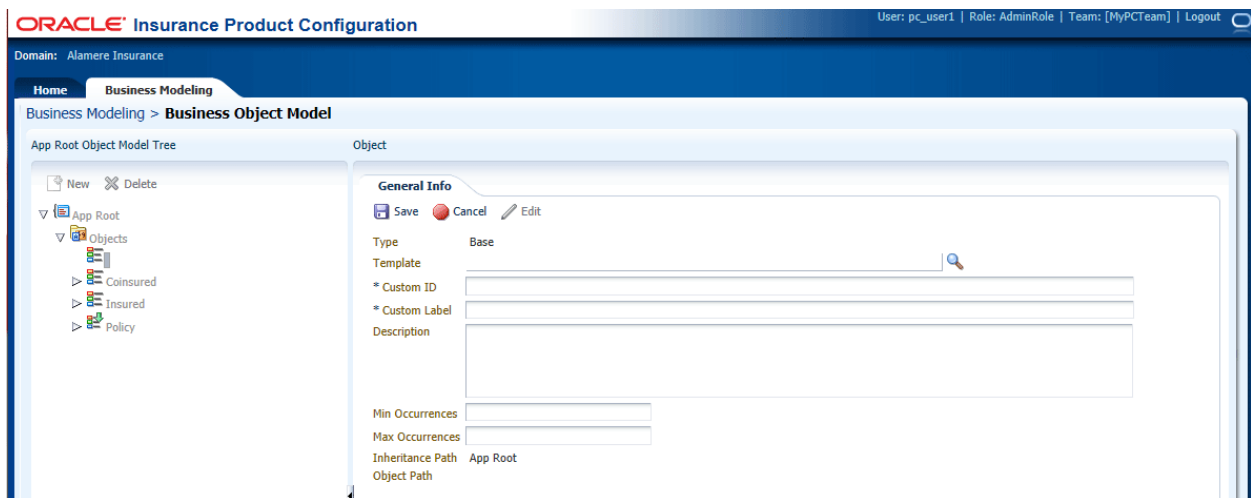


Figure 36 Creating a New Object

2. If you want to use a template, click to search icon to bring up the template search screen.
3. Enter the Custom ID.
4. Enter a Custom Label.
5. Enter a Description.
6. Enter the Min Occurrences
7. Enter the Max Occurrences
8. Click Save to save your entry.

If this is not the action you want to take, click Cancel to close the screen without saving any information.

Editing a Object

1. Select the Object you want to edit.
2. Click Edit. The detail view refreshes with the fields open for change.
3. Make any change.
4. Click Save to save your entry.

If this is not the action you want to take, click Cancel to close the screen without saving any information.

Deleting a Object

Non-System Objects can be deleted.

1. Select the Object you want to delete.
2. Click Delete. **No warning is given.** Make sure this is the action you want to take.

If this is not the action you want to take, click Cancel to close the screen without saving any information.

Searching for Templates:

You can search for a template to when creating an object.

1. Click the search icon at the end of the field and the template search screen is displayed.
2. Enter in the values you want to search on and click search.
3. Results are displayed in the lower portion of the search. Select the template you want and click OK.

Search and Select: Object Template

Search Advanced

Match All Any

Custom ID

Custom Label

Created By

Modified By

Origin

Created Date

Modified Date

Search Reset

CustomId	CustomLabel
No rows to display.	

OK Cancel

Figure 37 Searching for a Template

FIELDS

When the Fields container node is selected the right side detail view displays a table view listing of all fields defined at that level.

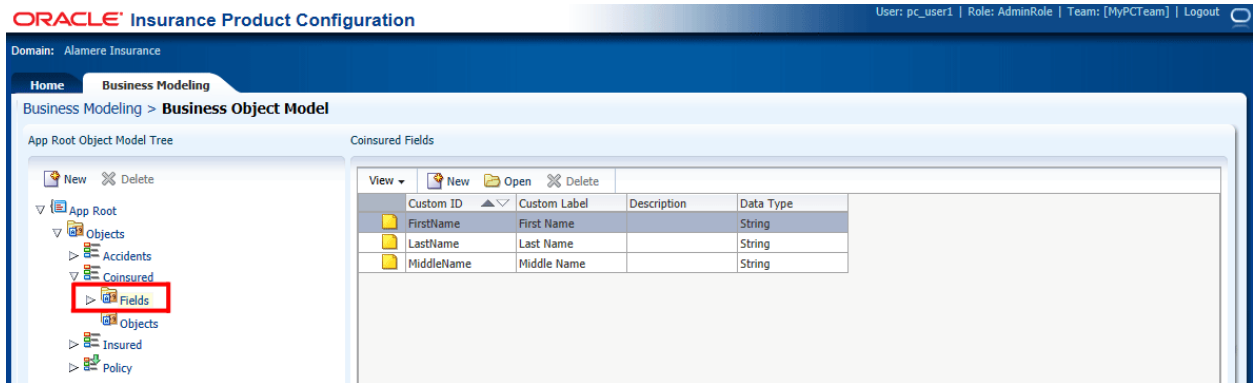




Figure 38 Business Object Model Tree, Fields


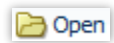


FIELDS FUNCTIONALITY

The Fields page has menu options located at the top of each view or listing section.

Business Object Model Tree Fields Options:

	Creates a new Field.
	Deletes the selected Field

Fields Table Options:

	Creates a new Field.
	Opens the selected Field
	Deletes the selected Field
	Opens the note dialog for the selected Field.

When a field is selected the right side detail view displays a general info tab, which includes the field properties Data Type, Custom ID Custom Label, Description, and additional properties based on the data type selected.

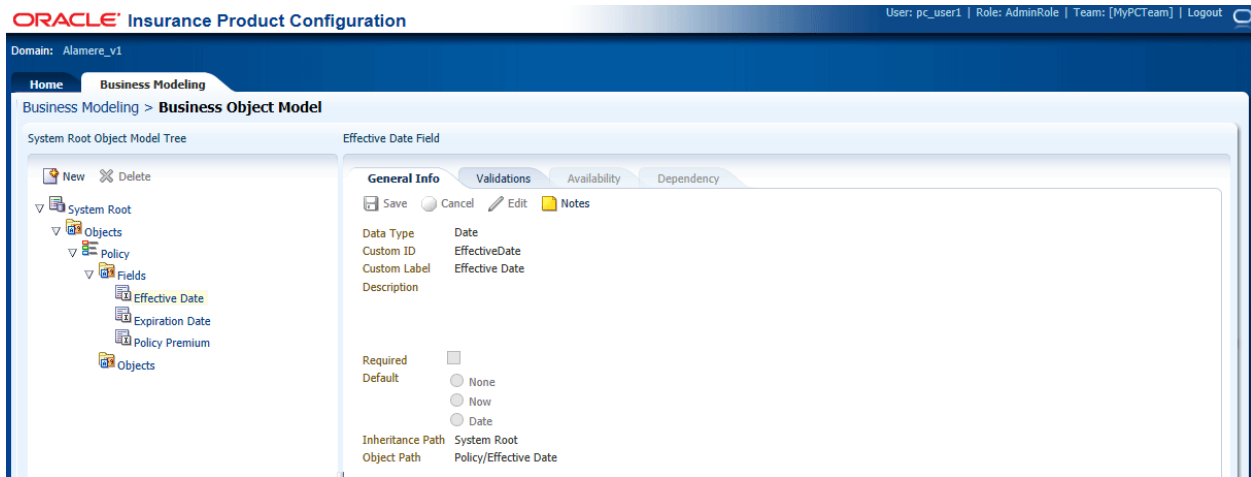




Figure 39 Business Object Model, Field



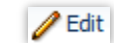

FIELD FUNCTIONALITY

The Field page has menu options located at the top of each view or listing section.

Business Object Model Tree Fields Options:

	Creates a new Field.
	Deletes the selected Field

Field Options:

	Saves the Field definition properties.
	Cancels the Field Edit action.
	Changes the selected Field to Edit mode.
	Opens the note dialog for the selected Field.

Creating a New Field

The detail view is where new Field properties are defined.

1. Click New. The detail view displays the blank fields for the new Field.

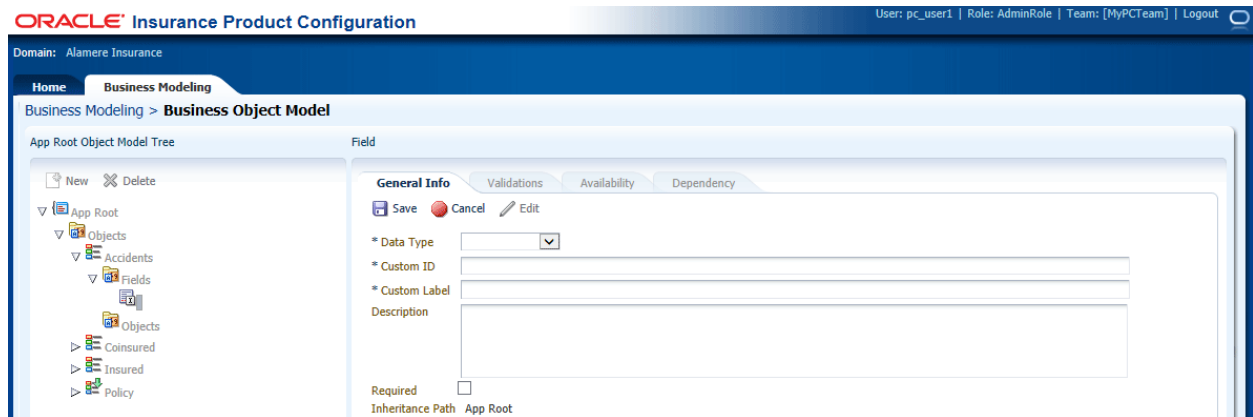


Figure 40 Creating a New Field

2. Select the Data Type
3. Enter the Custom ID.
4. Enter a Custom Label.
5. Enter a Description.
6. Check if the field is required.
7. Click Save to save your entry.

If this is not the action you want to take, click Cancel to close the screen without saving any information.

Editing a Field

1. Select the Field you want to edit.
2. Click Edit. The detail view refreshes with the fields open for change.
3. Make any change.
4. Click Save to save your entry.

If this is not the action you want to take, click Cancel to close the screen without saving any information.

Deleting a Field

Non-System Fields can be deleted.

1. Select the Field you want to delete.
2. Click Delete. **No warning is given.** Make sure this is the action you want to take.

If this is not the action you want to take, click Cancel to close the screen without saving any information.

PRODUCT OBJECT MODEL

Once Define Product is activated a new entry will be added under the Product Object Models node to represent the newly created Product Object Model (POM). By default the new POM will be named the same as the originating BOM. The new POM will be displayed in edit mode so its default property values can be modified and saved.

After saving the edits, the user is taken back to read-only mode.

Unlike BOMs, product object models include all inherited ancestor BOM objects and fields as well as all child BOM objects and fields.

A Product Object Model XML and XSD schema are generated when a POM is defined.

PRODUCT OBJECT MODEL FUNCTIONALITY

When a specific product is selected, the right side detail view displays two tabs.

- **General Info:** The BOM Type, Custom ID, Custom Label, and Description.
- **Versions:** A list of product versions, including version details Custom ID, Implementation Status, Version Label, Date Created, Created By, Description, Modified By, Last Modified By.

General Info Tab

The General Info tab displays information for the currently selected product. The information can be edited at any time.

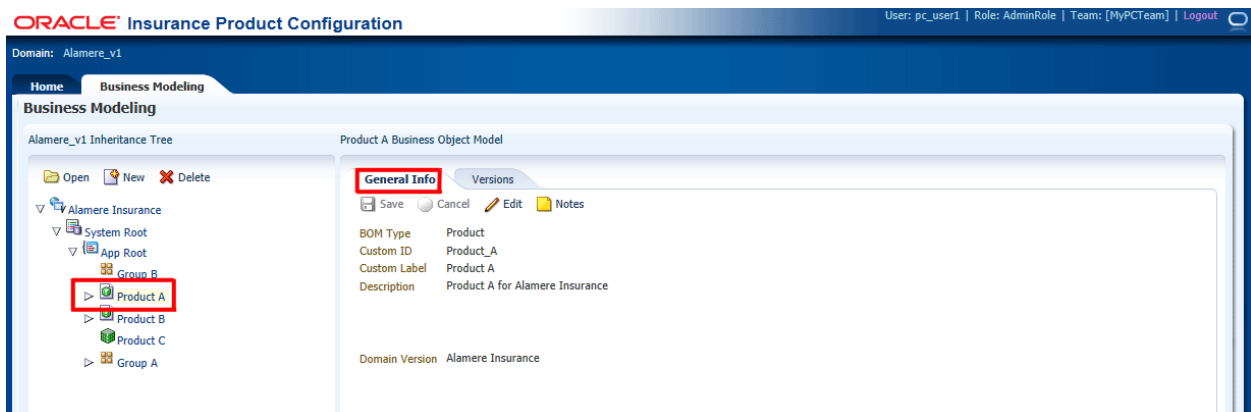

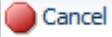

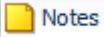


Figure 41 General Info Tab for Product

Product Detail General Info Options:

The domain general info tab contains the domain details on the right.

	Saves the domain.
	Cancel the domain edit action.
	Opens the edit screen for updates.
	Opens the note dialog for the selected Field.

Fields:

BOM Type	The type of business object used.
Custom ID	A user-defined unique alpha-numeric identifier. Must begin with an alpha character. IDs can be up to 65 characters.
Custom Label	A user-defined unique name. Name can be up to 65 characters, any combination of alpha numeric or special characters are allowed.
Description	A user-defined domain description or definition. Descriptions can be up to 255 characters, any combination of alpha numeric or special characters are allowed.

Product Versions

The Versions tab lists the versions for the currently selected product. The information can be edited at any time.

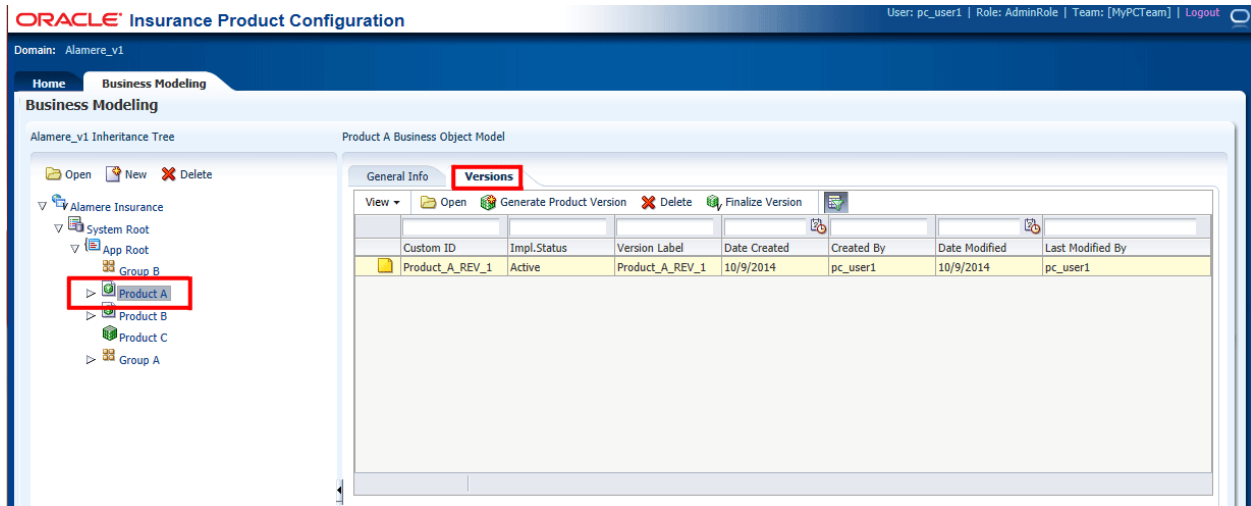






Figure 42 Product Object Models

Product Object Models Table Options:

 Open	Opens the selected product object model version.
 Generate Product Version	Creates a new product version
 Delete	Deletes the selected product object model version.
 Finalize Version	Finalizes product object model version.

Opening a Product Version

When a product object model is selected in the left pane the right pane detail view displays a table listing all of the product model versions for the current product.

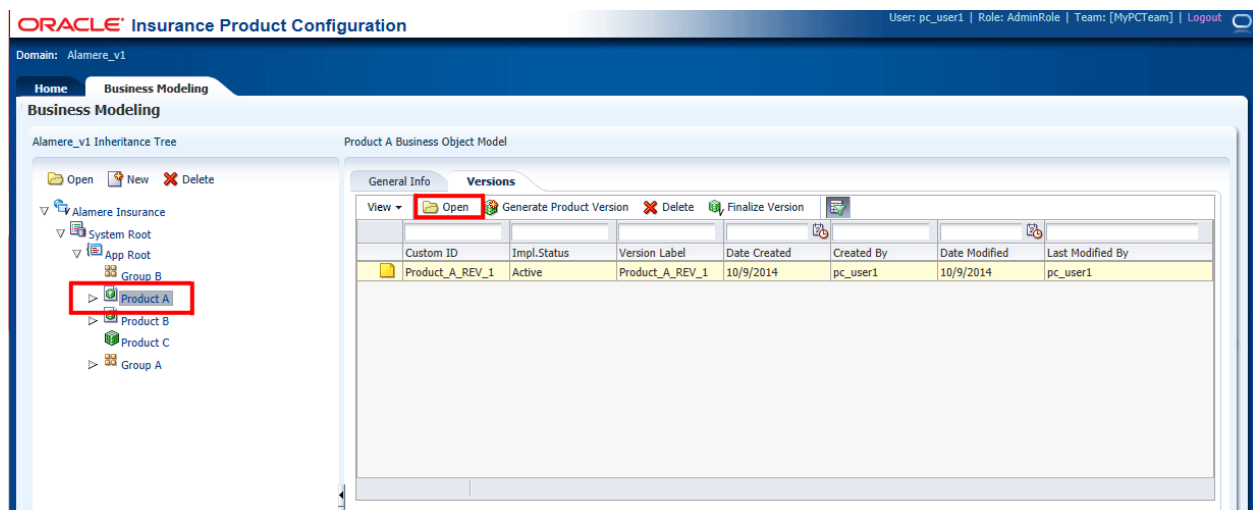


Figure 43 Product Object Model

When a Product Object Model Version is opened, three tabs are added to the details view.

- **Version Info:** Displays the Product Object Model Version properties:
- **Object Model:** Displays the Product Object Model XML document that is the product definition.
- **Payload XSD:** Displays the XSD schema for the product definition

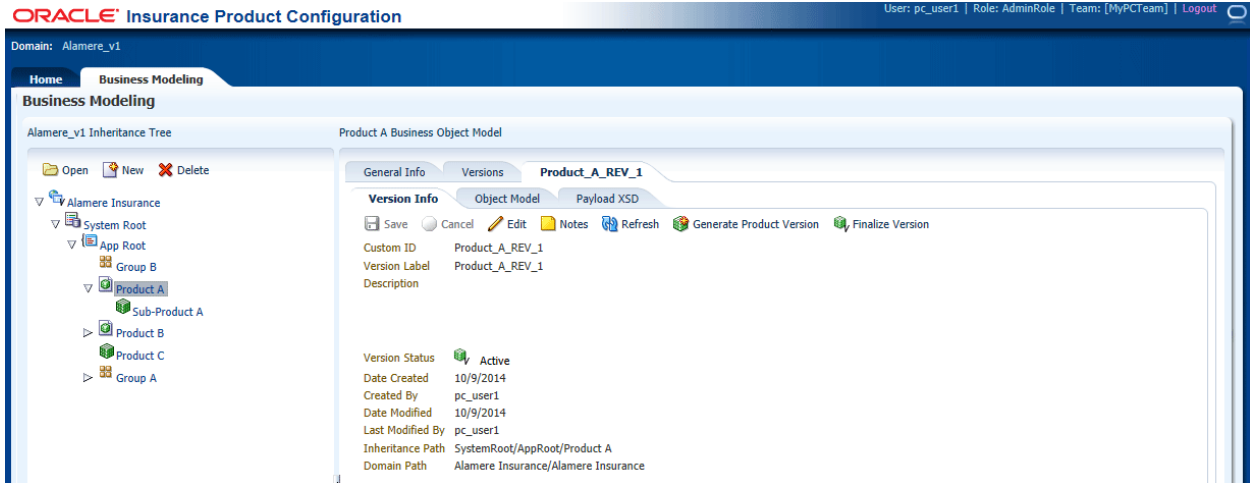

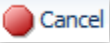

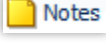

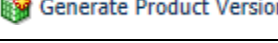
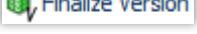


Figure 44 Product Object Model Version Info

Product Object Model Table Options:

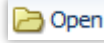


	Saves the business product model version definition properties.
	Cancels the business product model version Edit action.
	Changes the selected product object model version to Edit mode.
	Opens the note dialog for the selected Field.
	Refreshes the view
	Creates a new product version
	Finalizes product object model version.

Product General Info Fields:

Custom ID	A user-defined unique alpha-numeric identifier.
Version Label	This is the label for the currently selected product object model version.
Description	This is the description selected product object model version.
Version Status	The system-defined current implementation status of the selected product object model version. 'Active' indicates the version is in progress and available for editing. 'Finalized' indicates that the version is completed and locked; it cannot be modified.
Date Created	The date selected product object model version was created.
Created By	Lists the user who created the selected product object model version.

Date Modified	The date of the last modification. If the field is blank, it has not been modified.
Last Modified By	Lists the user who did the last modification. If the field is blank, it has not been modified.
Inheritance Path	The path where the product version is located
Domain Path	The domain location of the product version

Product Object Model Version Listing Options:

	Opens the selected business object model.
	Creates a new business object model.
	Deletes the selected business object model.

Object Model Tab

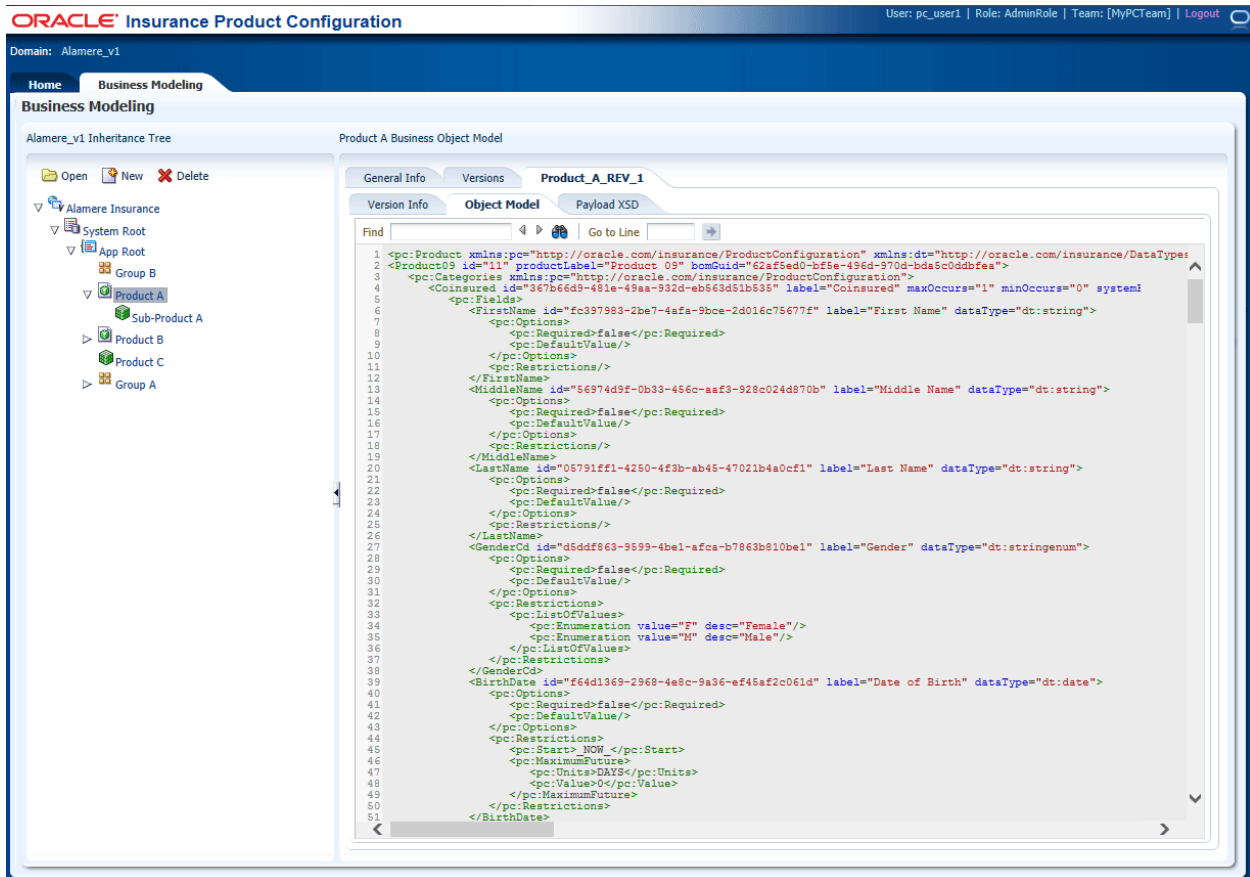


Figure 45 Product Object Model Version XML

Payload XSD

The screenshot displays the Oracle Insurance Product Configuration interface. The main window is titled "Product A Business Object Model" and shows the "Payload XSD" tab. The left sidebar shows the "Alamere_v1 Inheritance Tree" with a tree view containing "Alamere Insurance", "System Root", "App Root", "Group B", "Product A", "Sub-Product A", "Product B", "Product C", and "Group A".

The main content area shows the XSD payload for "Product_A_REV_1". The XSD code is as follows:

```

1 <?xml version = '1.0' encoding = 'UTF-8'?>
2 <xs:schema attributeFormDefault="unqualified" elementFormDefault="qualified" targetNamespace="http://oracle.com/insur
3
4
5 <xs:annotation>
6 <xs:appinfo>
7 <pc:schemaVersion>01.00.00</pc:schemaVersion>
8 <pc:productVersion>
9 <pc:id>9d47f033-2edf-4872-b3cb-81b5b29286e3</pc:id>
10 <pc:customId>SampleProduct09_v1</pc:customId>
11 <pc:label>Sample Product 09 Version 1</pc:label>
12 </pc:productVersion>
13 </xs:appinfo>
14 </xs:annotation>
15 <xs:element name="Product">
16 <xs:complexType>
17 <xs:all>
18 <xs:complexType>
19 <xs:choice minOccurs="4" maxOccurs="5">
20 <xs:element name="Coinsured" type="Type_Coinsured" minOccurs="0" maxOccurs="1"/>
21 <xs:element name="Insured" type="Type_Insured" minOccurs="1" maxOccurs="1"/>
22 <xs:element name="Policy" type="Type_Policy" minOccurs="1" maxOccurs="1"/>
23 <xs:element name="DCFeatures" type="Type_DCFeatures" minOccurs="1" maxOccurs="1"/>
24 <xs:element name="PCFeatures" type="Type_PCFeatures" minOccurs="1" maxOccurs="1"/>
25 </xs:choice>
26 </xs:complexType>
27 </xs:element>
28 </xs:all>
29 <xs:attribute name="id" type="UIDType" use="optional" fixed="9d47f033-2edf-4872-b3cb-81b5b29286e3"/>
30 <xs:attribute name="customId" type="xs:Name" use="optional" fixed="SampleProduct09_v1"/>
31 </xs:complexType>
32 </xs:element>
33 <xs:complexType name="Type_Coinsured">
34 <xs:all>
35 <xs:complexType>
36 <xs:all>
37 <xs:element name="FirstName" type="dt_string_field" minOccurs="0"/>
38 <xs:element name="MiddleName" type="dt_string_field" minOccurs="0"/>
39 <xs:element name="LastName" type="dt_string_field" minOccurs="0"/>
40 <xs:element name="GenderCd" type="Type_Coinsured_GenderCd_Field" minOccurs="0"/>
41 <xs:element name="BirthDate" type="dt_date_field" minOccurs="0"/>
42 <xs:element name="Age" type="dt_integer_field" minOccurs="0"/>
43 <xs:element name="MaritalStatusCd" type="Type_Coinsured_MaritalStatusCd_Field" minOccurs="0"/>
44 <xs:element name="OccupationDesc" type="dt_string_field" minOccurs="0"/>
45 <xs:element name="RelationshipToInsuredCd" type="Type_Coinsured_RelationshipToInsuredCd_Field" minO
46 </xs:all>
47 </xs:complexType>
48 </xs:element>
49 </xs:all>
50 </xs:element>
51 <xs:attribute name="id" type="xs:NMTOKEN" use="required"/>

```

Figure 46 Product Object Model Version XSD

Creating a New Product

Products are defined in the Business Modeling tab.

1. Select the Business Object Model where you want to create a Product.
2. In the listing area on the left, click New.

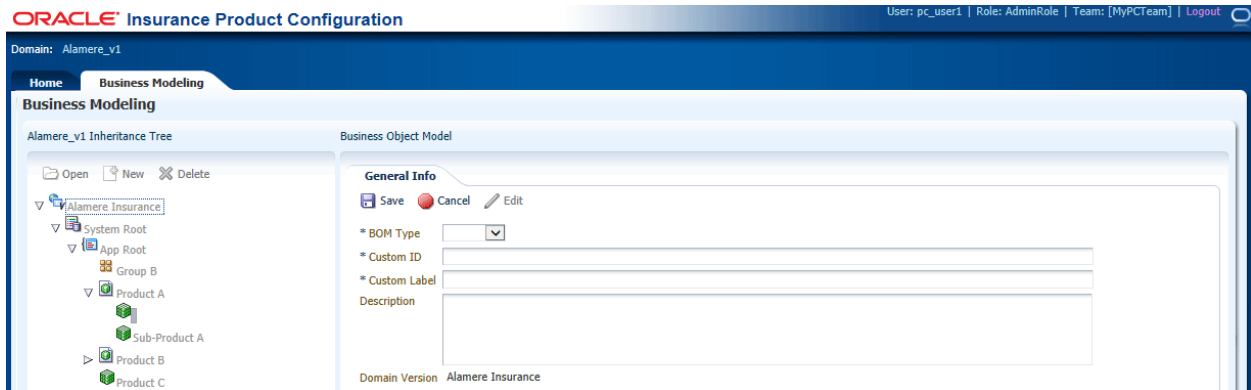


Figure 47 Creating a Product

3. Select Product for the BOM type.
4. Enter the Custom ID.
5. Enter the Custom Label.
6. Enter the Description
7. Click Save to save your entry.

If this is not the action you want to take, click Cancel to close the screen without saving any information.

Creating a New Product Version

Products are defined in the Business Modeling tab.

1. Select the Product where you want to create a Version.

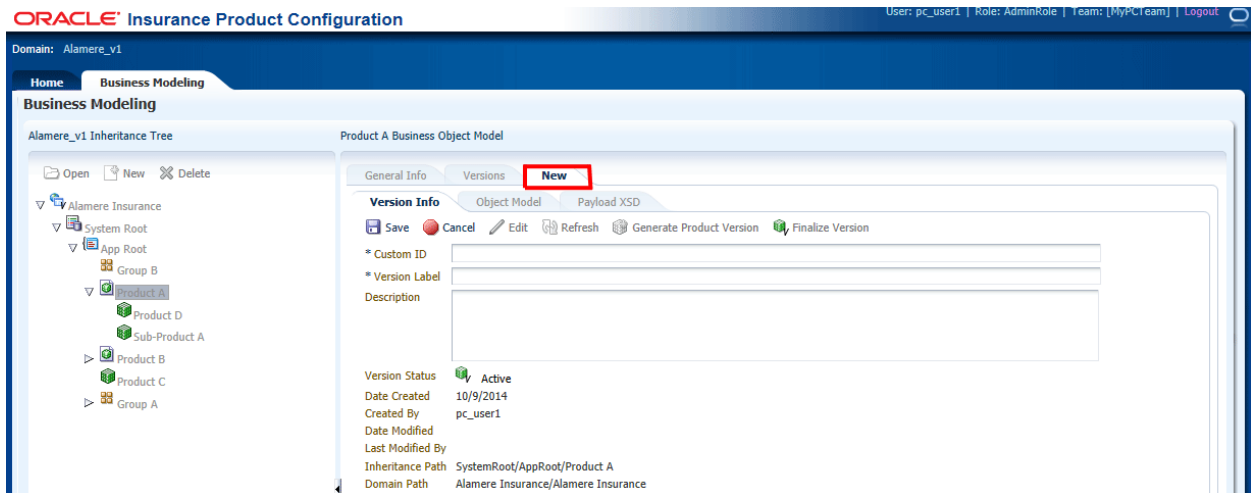


Figure 48 Product General Info

2. Select the Version tab.
3. Click Generate Product Version. The detail view displays the blank fields for the new Product.
4. Enter a Custom ID.
5. Enter the Version Label.
6. Enter the Description
7. Click Save to save your entry.

If this is not the action you want to take, click Cancel to close the screen without saving any information.

PRODUCT IMPLEMENTATION

Product Implementation is the utilization of a product object model version.

From the home tab select the product object model version you want to implement and select Product Implementation > Data Capture. This will launch the Data Capture Palette and create or update the selected product definition in data capture.

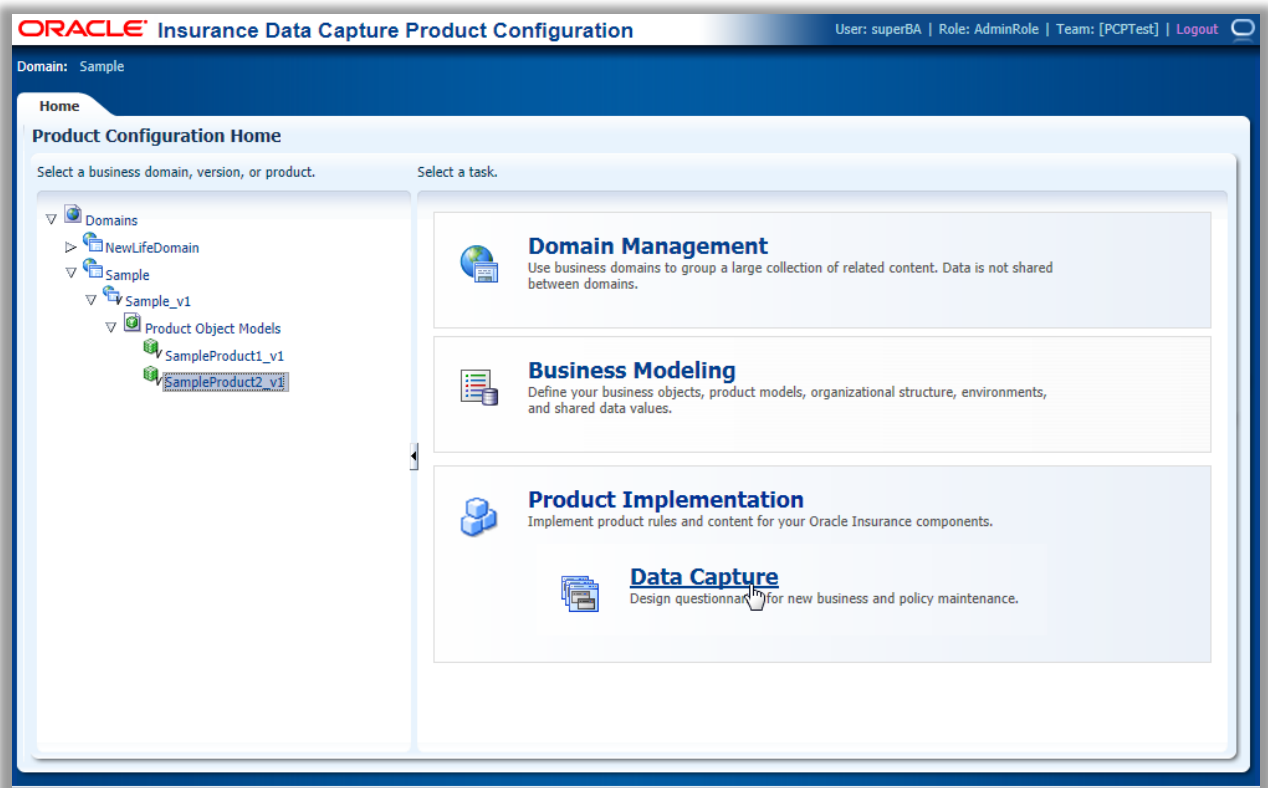


Figure 49 Product Implementation – Data Capture

PC ADMINISTRATION

Product Configuration Administration is where Application Settings and Tool Connections are managed.

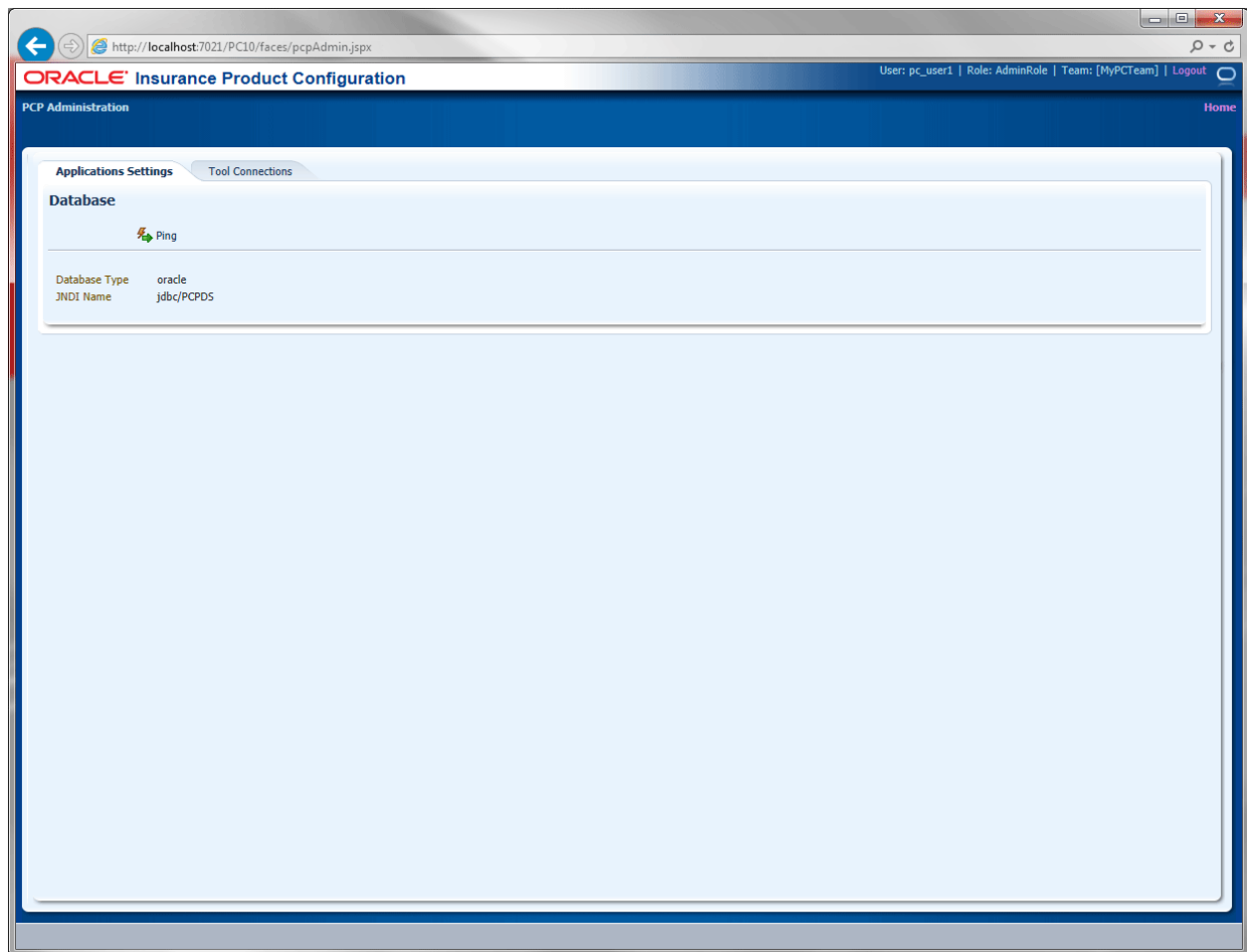


Figure 50 PC Administration

Ping – pings the database using the data source connection in WebLogic.

TOOL CONNECTIONS

There are two options:

- Data Capture Palette

- Workflow Management

Data Capture Palette

The Data Capture Palette screen contains the Palette URL.

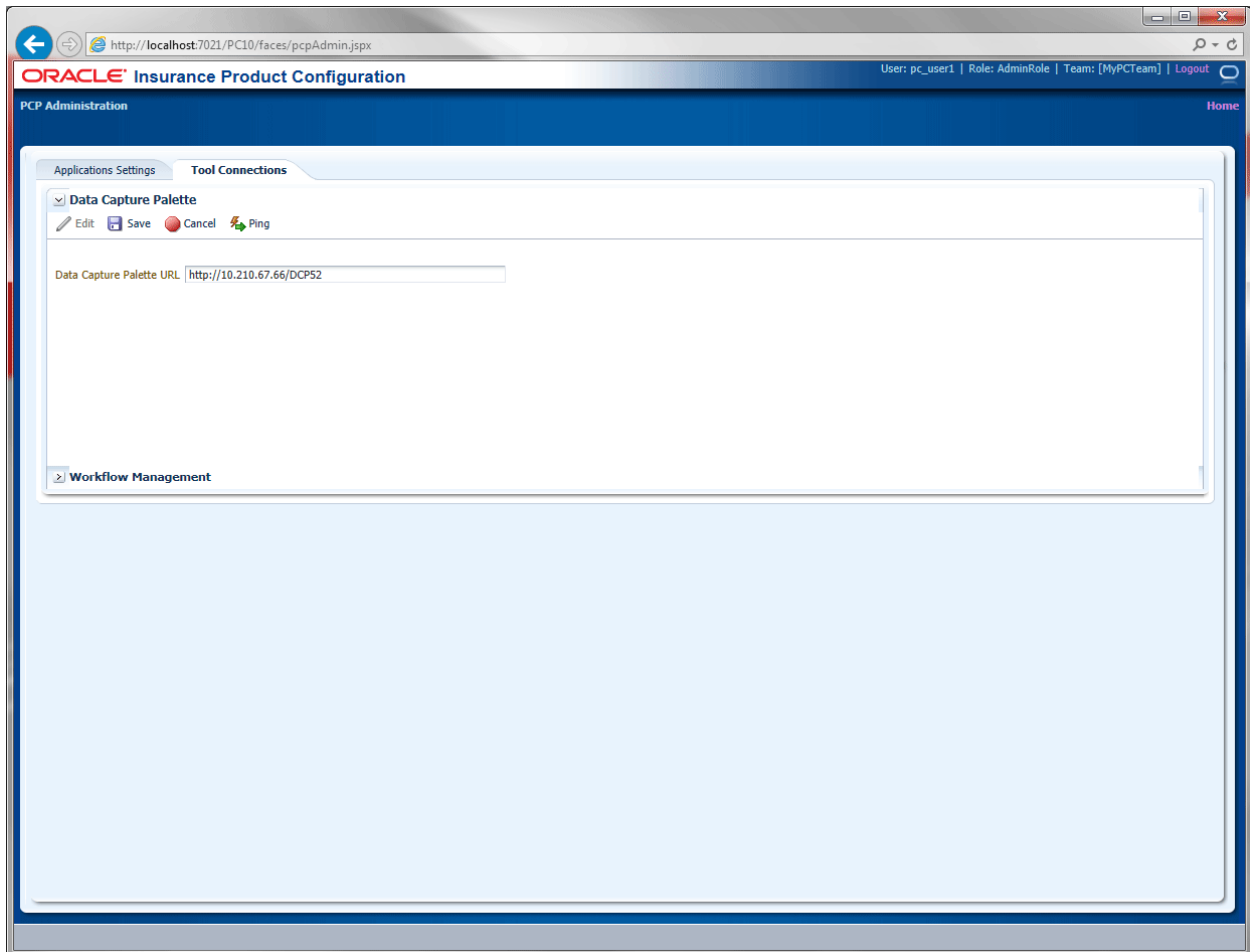


Figure 51 PC Tools

On this screen you can:

- Edit – edits the Palette URL.
- Save – saves any updates.
- Cancel – clears any changes and returns to configured settings.
- Ping – pings the URL.

A successful ping returns with a message.

Approval Workflow

Approval Workflow is an approval structure that can be utilized if a product needs to be reviewed/approved prior to releasing to Palette or to a Production environment.

An example approval workflow is delivered with the application. This sample implementation can be modified or completely replaced to suit your needs. It begins at the lowest approval level and holds there for 5 minutes. If approval has not been granted, then the approval escalates to the next level and holds there for 5 minutes. The escalation continues for two more levels.

If approval is still not given, the product must be refreshed to activate the status.

Levels of Escalation:

- Team Lead
- Supervisor
- Director
- President

Approval Process:

1. The product is generated with an approval requirement.
2. The request for approval is sent to the first approver. The request is valid for 5 minutes.
3. The approver logs in to the Worklist to approve.
 - a. If approval is granted, the product can be pushed to Palette or Production.
 - b. If approval is declined. It cannot be published as it currently exists. An update must be made and then the program can be resubmitted.

Product Vers Start State	Event	Product Vers End State	Approval Status
New	Request New Approval	New	Pending Approval
New	New Vers Approved	Active	Approved
New	New Vers Rejected	Rejected	Rejected
Active	Request Update Approval	Active	Pending Update Approval
Active	Update Approved	Active	Update Approved
Active	Update Rejected	Active	Update Rejected
Active	Request Finalization	Active	Pending Finalization Approval
Active	Finalization Approved	Finalized	Approved
Active	Finalization Rejected	Active	Finalization Rejected

Figure 52 Approval Hierarchy Chart

Activating Workflow:

To utilize approval workflow, an approval URL must be entered. This can be done on the Tool Connections page.

Product Approval URL: http://server:port/soa-infra/services/default/GenerateProductVersionApproval/generateproductversionapprovalprocess_client_e.p?WSDL

Work List URL: <http://server:port/integration/worklistapp>

The default is for Approval Workflow to be off.

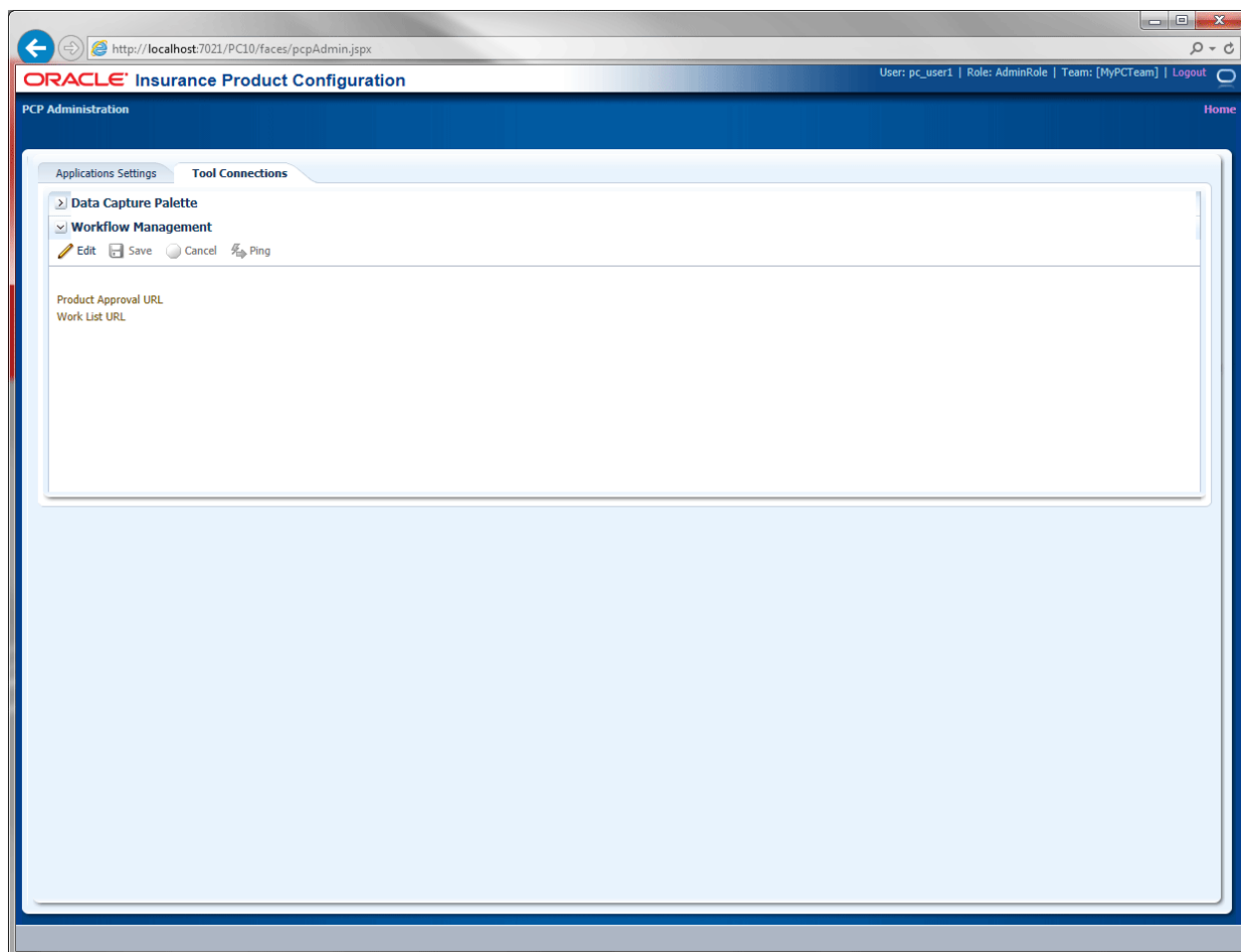


Figure 53 PC Approval Workflow Management – No Approval in Place

On this screen you can:

- Edit – edits the Product Approval URL and the Work List URL.
- Save – saves any updates.
- Cancel – clears any changes and returns to configured settings.
- Ping – pings the URL.

A successful ping returns with a message.

Common Errors

Bad Data Source entries:

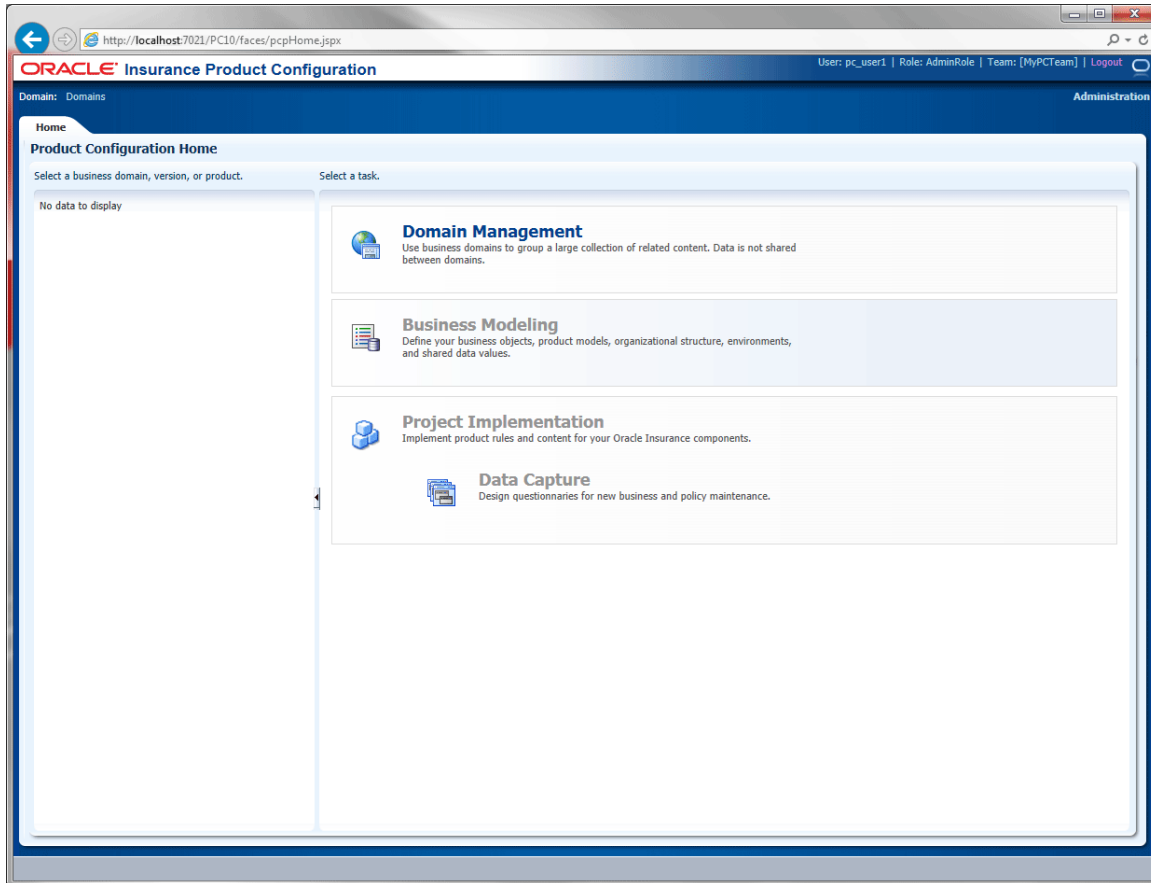


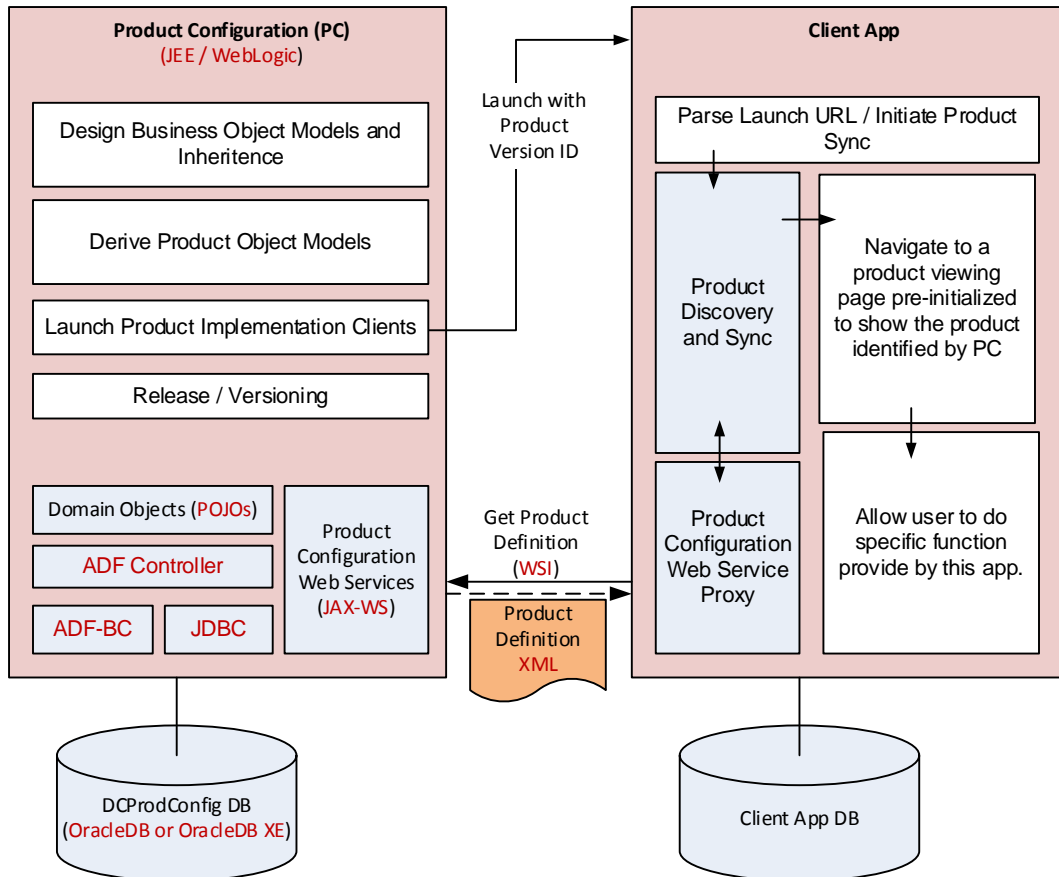
Figure 54 Product Configuration Home Page NO Domains

If the Home page displays without Domains, then verify the data source settings in the application server. The server verifies connection with the database but does not verify the connection with OIDC.

Integration

PC Query Services

Clients of Product Configuration will need to be able to get the meta-data about the products they have modeled.



Available Services:

- **GetDomainCatalog()** – Returns a hierarchy of domains and domain versions, including a minimal set of properties. Domain versions that have a parent domain version ID are nested as children of their parent domain versions.
- **GetDomainVersionDetail(int domainVersionId)** – Returns the full set of property values for the specified domain version, omitting the actual domain XML.
- **GetProductCatalog(int domainVersionId)** – Returns a hierarchy of products and product versions for the specified domain version ID, including a minimal set of properties.

- **GetProductVersionDetail(int productVersionId)** – Returns the full set of property values for the specified product version, omitting the actual product version XML, inheritance XML, and payload schema XML.
- **GetProdDiffXML(int productVersionId1, int productVersionId2)** – Returns a product version XML marked up to indicate elements that have been removed, added, or changed between the two versions of product version XML.

Sample Response XMLs

GetDomainCatalog

```
<Domains run_time="0.012">
  <Domain id="2">
    <Label>Sample PC Domain</Label>
    <ModifiedDate>2014-06-09T14:14:52-06:00</ModifiedDate>
    <DomainVersions>
      <DomainVersion id="2">
        <Label>Sample PC Domain Version 1</Label>
        <EffectiveDate>2014-06-09T00:00:00-06:00</EffectiveDate>
        <ModifiedDate>2014-09-24T16:08:24-06:00</ModifiedDate>
        <Status>Active</Status>
      </DomainVersion>
    </DomainVersions>
  </Domain>
  <Domain id="44">
    <Label>Business Demo Domain</Label>
    <ModifiedDate>2014-08-22T14:39:23-06:00</ModifiedDate>
    <DomainVersions>
      <DomainVersion id="62">
        <Label>Business Demo Domain Version 1</Label>
        <EffectiveDate>2014-09-01T00:00:00-06:00</EffectiveDate>
        <ModifiedDate>2014-10-08T04:54:36-06:00</ModifiedDate>
        <Status>Active</Status>
      <DomainVersions>
        <DomainVersion id="103">
          <Label>Personal Auto Version 2</Label>
          <EffectiveDate>2014-09-01T00:00:00-06:00</EffectiveDate>
          <ModifiedDate>2014-10-07T14:05:42-06:00</ModifiedDate>
          <Status>Active</Status>
        </DomainVersion>
      </DomainVersions>
    </DomainVersion>
  </DomainVersions>
</Domain>
</Domains>
```

GetDomainVersionDetail

```
<DomainVersion id="2" run_time="0.034">
  <Label>Sample PC Domain Version 1</Label>
  <EffectiveDate>2014-06-09T00:00:00-06:00</EffectiveDate>
  <ModifiedDate>2014-09-24T16:08:24-06:00</ModifiedDate>
  <Status>Active</Status>
  <Guid>ec47a839-a368-4576-9ddd-a775ea4e3a06</Guid>
  <CustomId>SamplePCDomain_v1</CustomId>
```

```

    <Description>This domain version is used to validate the features of Product
    Configuration and Data Capture Integration. Created 20140609 315 PM CDT</Description>
    <CreatedDate>2014-06-09T14:14:52-06:00</CreatedDate>
    <CreatedBy>BAUser</CreatedBy>
    <ModifiedBy>BAUser</ModifiedBy>
    <DomainId>2</DomainId>
    <DomainGuid>d253ad1a-cd05-418d-a285-3d5ca55b8508</DomainGuid>
    <HasNote>N</HasNote>
  </DomainVersion>

```

GetProductCatalog

```

<Products run_time="0.019">
  <Product id="1"/>
  <Product id="2"/>
  <Product id="3">
    <ProductVersions>
      <ProductVersion id="1">
        <Status>Active</Status>
        <Label>Sample Product 09 Version 1</Label>
        <ModifiedDate>2014-10-02T14:26:04-06:00</ModifiedDate>
      </ProductVersion>
    </ProductVersions>
  </Product>
  <Product id="4"/>
  <Product id="5">
    <ProductVersions>
      <ProductVersion id="42">
        <Status>Active</Status>
        <Label>Sample Product 11 Version 1</Label>
        <ModifiedDate>2014-09-24T16:10:08-06:00</ModifiedDate>
      </ProductVersion>
    </ProductVersions>
  </Product>
</Products>

```

GetProductVersionDetail

```

<ProductVersion id="42" run_time="0.046">
  <Status>Active</Status>
  <Label>Sample Product 11 Version 1</Label>
  <ModifiedDate>2014-09-24T16:10:08-06:00</ModifiedDate>
  <Guid>9bf33cd8-08fc-4de0-adf1-27f34e7748b0</Guid>
  <CustomId>SampleProduct11_v1</CustomId>
  <Description>PC Sample Product 11 Version 1 __updated ProductSubGroup01 (BOM)
  PCFeatures (Object) PCVersion (Field) r2.0.0 build 16 (Default), DCFeatures (Object)
  DCVersion (Field) r5.2.0 build 16 (Default) 20140924 510 PM CDT</Description>
  <CreatedDate>2014-06-30T12:35:41-06:00</CreatedDate>
  <CreatedBy>BAUser</CreatedBy>
  <ModifiedBy>BAUser</ModifiedBy>
  <ProductId>14</ProductId>
  <DomainVersionId>2</DomainVersionId>
</ProductVersion>

```

GetProdDiffXML

GetProdDiffXML accepts as parameters two Product Version IDs, retrieves the Product XML documents for these IDs (which we'll refer to as "ProdXML1" and "ProdXML2"), and compares the two XML documents.

The format of the GetProdDiffXML response is essentially the same as that of GetProductXML, but with the addition of diff="C", diff="A", and diff="R" attributes to identify those elements that have been changed, added, or removed, respectively.

For example, if ProdXML1 does not define a Coinsured object at all, but ProdXML2 does, the pc:Coinsured element in the GetProdDiffXML response is marked as "A" for "added":

```
<Coinsured id="d2914ac5-0fab-46c8-a449-b0ec75965041" ... diff="A">
```

If, on the other hand, ProdXML1 has an object (or field) that is not present in ProdXML2, a stub of that element is included in the response XML, marked as "R" for "removed". In the following example, SingleInstanceSubForm is present in ProdXML1 but not in ProdXML2:

```
<SingleInstanceSubForm id="9c81c0b1-75b2-4c53-a415-2ea3feafadfd" diff="R" />
```

When an object or field's custom ID or its GUID changes, the response XML will show the original element from ProdXML1 as removed and the new item as added. The following snippets show the notations for a field that has been renamed from Age to Vintage:

```
<Vintage id="040df80e-d39d-2048-83db-10a8ff22b6ce" ... diff="A">
  <pc:Options>
    <pc:Required>>false</pc:Required>
    <pc:DefaultValue />
  </pc:Options>
  <pc:Restrictions />
</Vintage>
<Age id="040df80e-3dd9-4056-83db-10a8ff22b6ce" diff="R" />
```

When an object or field is present in both ProdXML1 and ProdXML2, further comparisons are performed. First the item's attributes are compared and, if any does not match, the item is marked with "C" for "changed". For objects, the compared attributes are "minOccurs", "maxOccurs", "type", "standalone", and "systemFlag"; for base categories, "createsExtender" and "deletesExtender"; and for fields, "label" and "dataType".

For example, a field called OccupationDesc has its label changed from "Occupation" to "Profession" and is marked as changed in the GetProdDiffXML response:

```
<OccupationDesc id="b9776aae-24fc-48b6-bb71-79f248428c9c" label="Profession"
dataType="dt:string" diff="C">
```

PC Query Services XSD

```
<?xml version = '1.0' encoding = 'UTF-8'?>
<xs:schema xmlns:xs="http://www.w3.org/2001/XMLSchema"
  xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
  attributeFormDefault="unqualified" elementFormDefault="qualified">

  <xs:annotation>
    <xs:documentation xml:lang="en">
      This XSD documents the formats of the XML string responses returned by
      Product Configuration's information query operations exposed on the
      ProductManagerWSPort web service endpoint.
    </xs:documentation>
  </xs:annotation>

<!--
```

GLOBAL ELEMENTS

```

-->
<xs:element name="Domains">
  <xs:annotation>
    <xs:documentation xml:lang="en">
      Response XML returned by the GetDomainCatalog operation
    </xs:documentation>
  </xs:annotation>
  <xs:complexType>
    <xs:sequence>
      <xs:element name="Domain" minOccurs="0" maxOccurs="unbounded">
        <xs:complexType>
          <xs:all>
            <xs:element name="Label" type="xs:string"/>
            <xs:element name="ModifiedDate" type="xs:dateTime"/>
            <xs:element name="DomainVersions" type="DomainVersions_type"/>
          </xs:all>
          <xs:attribute name="id" type="xs:int" use="required"/>
        </xs:complexType>
      </xs:element>
    </xs:sequence>
    <xs:attribute name="run_time" type="xs:decimal" use="optional"/>
  </xs:complexType>
</xs:element>

<xs:element name="DomainVersion">
  <xs:annotation>
    <xs:documentation xml:lang="en">
      Response XML returned by the GetDomainVersionDetail operation
    </xs:documentation>
  </xs:annotation>
  <xs:complexType>
    <xs:all>
      <xs:element name="Label" type="xs:string"/>
      <xs:element name="EffectiveDate" type="xs:dateTime"/>
      <xs:element name="ModifiedDate" type="xs:dateTime"/>
      <xs:element name="Status" type="xs:string"/>
      <xs:element name="Guid" type="UUID_type"/>
      <xs:element name="CustomId" type="xs:string"/>
      <xs:element name="Description" type="xs:string"/>
      <xs:element name="CreateDate" type="xs:dateTime"/>
      <xs:element name="CreatedBy" type="xs:string"/>
      <xs:element name="ModifiedBy" type="xs:string"/>
      <xs:element name="DomainId" type="xs:int"/>
      <xs:element name="DomainGuid" type="UUID_type"/>
      <xs:element name="HasNote" type="YNBoolean_type"/>
    </xs:all>
    <xs:attribute name="id" type="xs:int" use="required"/>
    <xs:attribute name="run_time" type="xs:decimal" use="optional"/>
  </xs:complexType>
</xs:element>

<xs:element name="Products">
  <xs:annotation>
    <xs:documentation xml:lang="en">
      Response XML returned by the GetProductCatalog operation
    </xs:documentation>
  </xs:annotation>
  <xs:complexType>
    <xs:sequence>
      <xs:element name="Product" minOccurs="0" maxOccurs="unbounded">
        <xs:complexType>
          <xs:sequence>

```



```

        <xs:element name="ProductVersions" minOccurs="0">
            <xs:complexType>
                <xs:sequence>
                    <xs:element name="ProductVersion"
                        type="ProductVersion_summary_type"
                        maxOccurs="unbounded" />
                </xs:sequence>
            </xs:complexType>
        </xs:element>
        <xs:attribute name="id" type="xs:int" use="required" />
    </xs:complexType>
</xs:element>
</xs:sequence>
<xs:attribute name="run_time" type="xs:decimal" use="optional" />
</xs:complexType>
</xs:element>

<xs:element name="ProductVersion">
    <xs:annotation>
        <xs:documentation xml:lang="en">
            Response XML returned by the GetProductVersionDetail operation
        </xs:documentation>
    </xs:annotation>
    <xs:complexType>
        <xs:all>
            <xs:element name="Status" type="xs:string" />
            <xs:element name="Label" type="xs:string" />
            <xs:element name="ModifiedDate" type="xs:dateTime" />
            <xs:element name="Guid" type="UUID_type" />
            <xs:element name="CustomId" type="xs:string" />
            <xs:element name="Description" type="xs:string" />
            <xs:element name="CreatedDate" type="xs:dateTime" />
            <xs:element name="CreatedBy" type="xs:string" />
            <xs:element name="ModifiedBy" type="xs:string" />
            <xs:element name="ProductId" type="xs:int" />
            <xs:element name="DomainVersionId" type="xs:int" />
        </xs:all>
        <xs:attribute name="id" type="xs:int" use="required" />
        <xs:attribute name="run_time" type="xs:decimal" use="optional" />
    </xs:complexType>
</xs:element>

<!--
C O M P L E X   T Y P E S
-->
<xs:complexType name="DomainVersions_type">
    <xs:annotation>
        <xs:documentation xml:lang="en">
            Type definition for DomainVersions element used in Domains element
        </xs:documentation>
    </xs:annotation>
    <xs:sequence>
        <xs:element name="DomainVersion"
            type="DomainVersion_summary_type"
            minOccurs="0" maxOccurs="unbounded" />
    </xs:sequence>
</xs:complexType>

<xs:complexType name="DomainVersion_summary_type">
    <xs:annotation>
        <xs:documentation xml:lang="en">
            Type definition for ProductVersion and DomainVersion summary elements

```

```

    </xs:documentation>
  </xs:annotation>
  <xs:all>
    <xs:element name="Label" type="xs:string" minOccurs="0"/>
    <xs:element name="EffectiveDate" type="xs:dateTime" minOccurs="0"/>
    <xs:element name="ModifiedDate" type="xs:dateTime" minOccurs="0"/>
    <xs:element name="Status" type="xs:string" minOccurs="0"/>
    <xs:element name="DomainVersions" type="DomainVersions_type" minOccurs="0"/>
  </xs:all>
  <xs:attribute name="id" type="xs:int"/>
</xs:complexType>

<xs:complexType name="ProductVersion_summary_type">
  <xs:annotation>
    <xs:documentation xml:lang="en">
      Type definition for ProductVersion and DomainVersion summary elements
    </xs:documentation>
  </xs:annotation>
  <xs:all>
    <xs:element name="Label" type="xs:string"/>
    <xs:element name="ModifiedDate" type="xs:dateTime"/>
    <xs:element name="Status" type="xs:string"/>
  </xs:all>
  <xs:attribute name="id" type="xs:int"/>
</xs:complexType>

<!--
S I M P L E   T Y P E S
-->
<xs:simpleType name="UUID_type">
  <xs:annotation>
    <xs:documentation xml:lang="en">
      Local type restriction for elements representing UUID values
    </xs:documentation>
  </xs:annotation>
  <xs:restriction base="xs:token">
    <xs:pattern value="[A-Fa-f0-9]{8}-[A-Fa-f0-9]{4}-[A-Fa-f0-9]{4}-[A-Fa-f0-9]{4}-[A-Fa-f0-9]{12}"/>
  </xs:restriction>
</xs:simpleType>

<xs:simpleType name="YNBoolean_type">
  <xs:annotation>
    <xs:documentation xml:lang="en">
      Local type restriction for elements representing Y|N boolean values
    </xs:documentation>
  </xs:annotation>
  <xs:restriction base="xs:string">
    <xs:enumeration value="N"/>
    <xs:enumeration value="Y"/>
  </xs:restriction>
</xs:simpleType>

</xs:schema>

```

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 [Response 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 OIIC 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 [Question Sequence (QSeq)]	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 [SubQuestionList]	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 [Questionnaire]	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.

INDEX

A

Adding
 Notes, 18

D

Data Preparation, 11

E

Edition Notice, 2

F

Full Access, 11

I

ID
 Product Page, 53
 Project Page, 23

L

Label
 Project Page, 23
Login, 10
 Failure, 10
 Help, 11

N

No Access, 11
Notes
 Adding, 18

O

Oracle Resources, vi

P

Palette
 Data Preparation, 11
Palette Contents, 13, 33
Permissions, 11

S

Special Characters
 Notes, 18

V

Versions
 Product Page, 53
View Only, 11