



Mapping Fundamentals

The Principles of Mapping

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ACORD

Objectives

- Learn the principles of mapping
- How to transform data to the standard format
 - Including element to element transformation and data relationships
- Learn which tools and processes you need to accomplish the task
 - Including XSLT and XPath notations

Agenda

- Process / Service
- Transaction / Business Message
- Business Data
- Mapping Notation / Documentation

Process / Service

- What's the context/service?
 - Ex. Request for Quote
 - Ex. Billing Inquiry
- What is the source of the data?
- What is the destination of the data?

What's the context/service?

- How do I define the context?
- Are there a list of services available?
- What if they don't have a context?

What is the source of the data?

- What do you mean by “source of the data?”
- How much do I need to know about the data provider?

What is the destination of the data?

- What do you mean by “destination of the data?”
- How technical do we have to be in defining the destination?
- If our messages are being exchanged internally do we need to know the destination?

Transaction / Business Message

- Is there a transaction in the standard that supports the service?
- How do we find the right transaction?
- What if there is a not a transaction currently defined for my use case?

What if we already know what transaction to use?

- What does ACORD mean by a transaction?
- Where can I find the ACORD transaction information?

How do I find the right transaction?

- Is there a transaction in the standard that supports the service?
- Narrow the focus by defining:
 - Participant
 - Process
 - Product

What if there is no ACORD transaction?

- Can ACORD help if there is not currently a transaction that meets my needs?
- How do I define a new ACORD transaction?

Business Data

- How do I make sense of the business data within the transaction?
- What is data element to data element mapping?

Data Types and Transformations

- How important are Data Types?
 - Strings, numbers, dates, times, percents
 - Booleans, Currency, Real
 - Enumerations (Lookups)
- What is a multi-part transformations?
 - Many to one / One to many
 - Parts left over...

Data Naming and Definitions

- “A rose by any other name...”
- Interpreting ACORD definitions
- Inferences – when something is not there
- Defaults – when something is there even when it is not there

Data Complexities

- Conditionals, Business Rules, Special Requirements
- Pre-processing – before the mapping takes place
- Post-processing – after the mapping takes place

Mapping Notation / Documentation

- Once I find what I'm looking for, how do I document it?
- Any special insights?

How can ACORD assist me?

- Help Files
- Schemas
- Online Resources
- Working Groups
- Collaboration

Resources: www.acord.org



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Resources: ACORD Documentation

- Standards & Implementation Guides
 - Forms / eForms
 - AL3
 - XML
- Delivery / File Access
 - Public
 - Members' Only

Are mapping documents really needed?

- Mapping Documents
 - Data Transformation Tables
 - Business Rules and Requirements
 - Use Cases and Message Choreography
- Tools of the Trade
 - Spreadsheets
 - Text Editors
 - XML and UML Applications

What is XML mapping notation?

- XML Sample
 - `<Person> ... </Person>`
 - `<LastName>Rogers</LastName>`
- What is XPath?
- What is XSLT?

What is XPath?

- XPath Defined
 - XML Path Language
 - Provides a simple text method of addressing structured information
- XPath Example
 - `<Person>`
 - `<LastName>Rogers</LastName>`
 - `</Person>`
 - `//Person/LastName/`

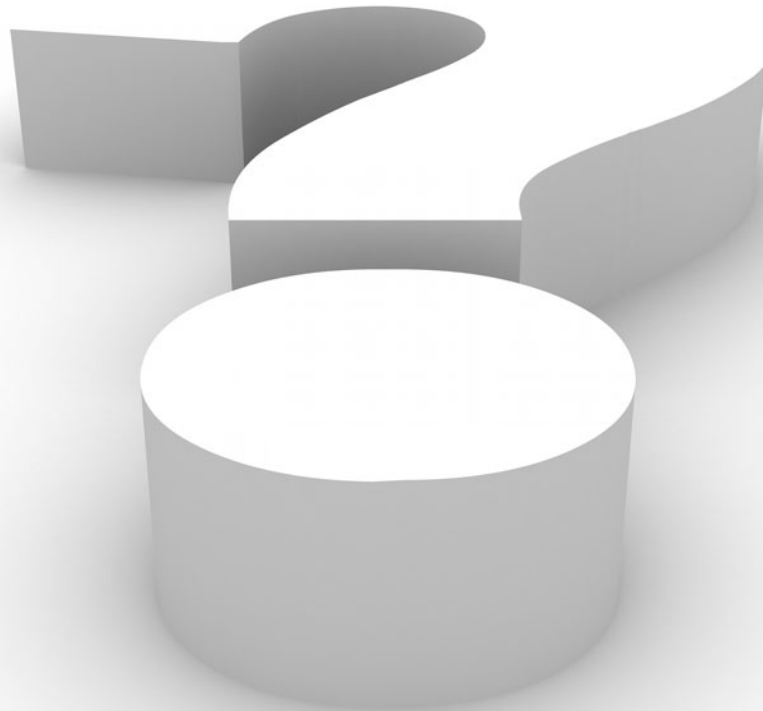
What is XSLT?

- **XSLT Defined**
 - Extensible Stylesheet Language Transformations
 - Provides a way of transforming XML from one format into another
- **XSLT Uses**
 - Converting XML to XML
 - Changing XML to HTML
 - Extracting data from an XML file

Conclusion

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- Business Data
- Mapping Notation / Documentation

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