

**Oracle® Insurance Policy
Administration**

Backward Compatibility

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INTRODUCTION

Backward compatibility issues can occur when features or configuration in a previous release are not supported in a compatible way in the new release. Every consideration is given during OIPA development to preserve compatibility between releases; however, in some cases, a required feature cannot be implemented without introducing configuration that has no counterpart in previous releases, or deprecating elements in the previous configuration that are incompatible with new features. An upgrade from OIPA Version 9.4.1 to Version 9.5 or Version 9.6 presents two types of backward compatibility issues:

- Changes to the database that have been automated with scripts provided by Oracle.

In some cases, the correspondence between the old and new configuration elements allows an automated transform to convert old configuration elements to the new ones. Automated scripts can perform generic updates for configuration elements that meet the conditions described in the release notes for each script.

- Changes to the database that you must manually configure.

Some elements of a configuration do not yield to a one-to-one conversion from old to new configuration. Changes of this nature require case-by-case analysis of the impact and necessary corrective actions for specific OIPA configurations.

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MANUAL CONFIGURATION UPDATES

New features in OIPA Version 9.6 that may require manual configuration updates are listed in this section under each feature.

High Level Steps for Manual Configuration

The general approach for manual configuration changes is as follows:

1. Locate the impacted rule.
2. Make any configuration syntax changes to existing rules.
3. Configure the new rule if one is being added to replace a deprecated rule.

Support Enhancements to Comments Functionality

This feature provides support for Policy, Segment, Client, Activity and Suspense comments. In addition, all comments relating to a particular policy or client can be viewed on a single screen. Comments can be categorized and filtered. Security will control who can add, view, modify, delete and view history of a comment. In addition, Comment Templates can be created that will contain predefined or canned text.

- Identify instances of <AllowComments> with a value of Yes or with a value of No identified in transaction XML and if found, modify configuration removing this element.
- Identify instances of <AllowComments> with a value of Yes or with a value of No in business rule XML on the premise that copybooks containing this configuration may be referenced within the transaction. If found, modify configuration removing this element.
- Create a single Global version of the CommentsScreen business rule to replace any instances of <AllowComments='Yes'>.
- The Global version of the CommentsScreen rule will contain the element <DefaultComments></DefaultComments> within the rule opening and closing tags </CommentsScreen>.
- The following buttons will no longer be supported and should be removed from AsAuthTransactionButton table:
 - AddComment
 - DeleteAllComments
 - DeleteUserCommentsOnly
 - UpdateAllComments
 - UpdateUserCommentsOnly
 - ViewAllComments
 - ViewAllCommentsHistory
 - ViewUserCommentsHistoryOnly
 - ViewUserCommentsOnly

Query to locate AllowComments syntax in transaction XML

```
SELECT ASTRANSACTION.TRANSACTIONGUID, ASTRANSACTION.XMLDATA FROM  
ASTRANSACTION WHERE ASTRANSACTION.XMLDATA LIKE '%AllowComments%'
```

It is possible that the syntax is contained in a CopyBook that is used by the transaction.

Query to locate AllowComments syntax in a business rule

```
SELECT ASBUSINESSRULES.BUSINESSRULEGUID, ASBUSINESSRULES.XMLDATA FROM  
ASBUSINESSRULES WHERE ASBUSINESSRULES.XMLDATA LIKE '%AllowComments%'
```

Statement to remove AllowComments syntax from transaction XML

```
UPDATE ASTRANSACTION SET XMLDATA = ? WHERE TRANSACTIONGUID = ?
```

Statement to remove AllowComments syntax from business rule XML

```
UPDATE ASBUSINESSRULES SET XMLDATA = ? WHERE BUSINESSRULEGUID = ?
```

Statement to insert CommentsScreen record into AsBusinessRules

```
INSERT INTO ASBUSINESSRULES ( BUSINESSRULEGUID, RULENAME, TYPECODE, XMLDATA,  
XMLSCHEMA, CLIENTNUMBER ) VALUES ( ?, ?, ?, ?, ?, ? )
```

Statement to delete AsAuthTransactionButton record based on AuthTransactionGUID

```
DELETE FROM AsAuthTransactionButton WHERE AUTHTRANSACTIONGUID = ?
```

Query to identify and delete deprecated buttons from AsAuthTransactionButton

```
SELECT ASAUTHBUTTON.BUTTONNAME,  
ASAUTHTRANSACTIONBUTTON.AUTHTRANSACTIONGUID FROM  
ASAUTHTRANSACTIONBUTTON, ASAUTHBUTTON WHERE  
ASAUTHTRANSACTIONBUTTON.AUTHBUTTONGUID = ASAUTHBUTTON.AUTHBUTTONGUID  
AND ASAUTHBUTTON.BUTTONNAME IN  
( 'AddComment', 'DeleteAllComments', 'DeleteUserCommentsOnly', 'UpdateAllComments', 'UpdateUserCo  
mmentsOnly', 'ViewAllComments', 'ViewAllCommentsHistory', 'ViewUserCommentsHistoryOnly', 'ViewUse  
rCommentsOnly' )
```

Query to identify transactions impacted by security change by TransactionName (needed for Reports)

```
SELECT ASTRANSACTION.TRANSACTIONNAME, ASAUTHTRANSACTION.TRANSACTIONGUID  
FROM ASAUTHTRANSACTION, ASTRANSACTION WHERE  
ASAUTHTRANSACTION.TRANSACTIONGUID = ASTRANSACTION.TRANSACTIONGUID AND  
ASAUTHTRANSACTION.AUTHTRANSACTIONGUID = "
```

Support Unitized Funds

OIPA needs to support fixed funds that are valued using prices stored on the AsNetAssetValue table. These funds are allocated to policies using a single parent fund but individual deposits and withdrawals are made using sub-funds that are available based on activity effective date. Only one sub-fund will be available for a parent fund for any given date. Even though these funds are valued and accounted for using unit values, the system will not calculate or record any gain (or loss) for back dated activities.

- Identify instances of </Relation> in the FundListForAllocation business rule and modify configuration wrapping </Relation> with the parent element </Relations>.
- Identify instances of <FundLevel> in transaction XML and modify configuration wrapping <FundLevel> with parent element </FundLevels>.
- Identify instances of <FundLevel> in business rule XML on the premise that copybooks containing this syntax may be referenced in the transaction and modify configuration wrapping <FundLevel> with parent element </FundLevels>.

Query to obtain XMLDATA from FundListForAllocation business rule so that a search can be made for the element <Relation>

```
SELECT ASBUSINESSRULES.BUSINESSRULEGUID, ASBUSINESSRULES.XMLDATA FROM
ASBUSINESSRULES WHERE RULENAME='FundListForAllocation'
```

Query to obtain transaction XMLDATA so that a search can be made for the element <FundLevel>

```
SELECT ASTRANSACTION.TRANSACTIONGUID, ASTRANSACTION.XMLDATA FROM
ASTRANSACTION
```

Query to obtain BusinessRule XMLDATA from any business rules (CopyBooks) found to have the <FundLevel> or the <Relation> elements

```
SELECT ASBUSINESSRULES.BUSINESSRULEGUID, ASBUSINESSRULES.XMLDATA FROM
ASBUSINESSRULES WHERE RULENAME IN(
```

Statement to update AsBusinessRules for addition of <Relations> or <FundLevels> wrappers

```
UPDATE ASBUSINESSRULES SET XMLDATA = ? WHERE BUSINESSRULEGUID = ?
```

Statement to update AsTransaction for addition of <FundLevels> wrapper

```
UPDATE ASTRANSACTION SET XMLDATA = ? WHERE TRANSACTIONGUID = ?
```