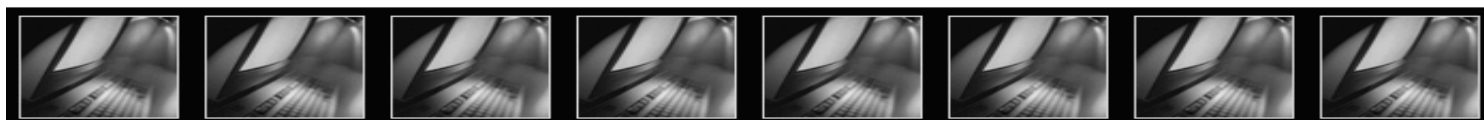


Activity Processing User's Guide

Oracle® Insurance Policy Administration - Life
Release 8.1
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Oracle® Insurance Policy Administration -Life Release 8.1

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Introduction

This document provides an overview of activity processing functionality in the Oracle Insurance Policy Administration system (OIPA). Activities are business events that are applied to a policy. In OIPA, activity processing has two main components; the activity type and the activity status. These components are instrumental in tracking and understanding what and how activity records apply to a policy.

Activity Processing

Activity processing is performed on the Activity Screen in OIPA. Some activity processing can occur on other screens, but typically the Activity Screen houses the activity processing functionality. There are several ways to process an activity. They can be done manually by the user, generated by the system, reversed or deleted. This is the first main component; the Activity type. The status of the activity is then established, which can be active, pending, shadowed, etc. This is the second main component; the Activity Status.

The Activity Screen

The Activity Screen provides a list of activities applicable to a policy and their associated data. A filter option allows you to specify the activities you want to see based on their type and/or status. Also on this screen are the processing options available to process activities.

You can manually process activities on the screen by selecting the activity from the Activity drop-down box. Then use the **Add** button and other processing options such as **Delete**, **Recycle** and **Process**. The Auto-Process check box will allow the system to attempt processing all Activities up to the current date.

Activity(4)	Activity Date	Status	Amount	Attachments	Action
Premium	05/02/2008	Pending	\$3		[Process] [Delete] [Recycle]
CoverageCalculation	05/01/2008	Active			[Process] [Delete] [Recycle]
CoverageCalculation	04/20/2008	Shadow			[Process] [Delete] [Recycle]

Filtering Activities

Activities will only display if their filter is checked. The system usually defaults to show all Document and Financial Activities. If an activity is a shadow, reversal, or future activity it will not display unless the filtering is manually set to show these items.

Shadows display the activities that were reversed.

Reversals display the activities that were generated to reverse an activity.

Futures display activities that are pending for a future date.

Documents display any activities that are documents or reports and is usually defaulted.

Financial displays all pending and active activities and is usually defaulted.

Delete allows activities to be deleted. Only available in certain situations.

Activity Records

Activity records are written to the AsActivity table. The type of activity is tracked in the TypeCode column and the status in the StatusCode column.

The screenshot shows the Aqua Data Studio 6.0.15 interface. On the left, the 'Columns' list for the 'dbo.AsActivity' table is displayed, with 'StatusCode (varchar(2))' highlighted. The main window shows a query 'SELECT * FROM ASACTIVITY' executed against the 'SQL-QA' database, 'dbo' schema, with 'SA' username and 'spid: 51'. The result set contains 422 records. Below is a sample of the data returned:

	ActivityGUID	TypeCode	StatusCode
1	9B12DFC3-B6CA-55B0-B8F8-F67768AF5151	01	01
2	AA29FE4D-DBF6-CA1A-1DD1-6F5E43F1E56C	02	01
3	0C1FA43E-BA64-5DD3-79AE-92AFBB6A99EB	01	12
4	4B8332F2-E6D8-FAA7-03C3-EFBCA146CF0C	01	34
5	FA1DD196-662C-F3AC-4199-DB2034149819	01	01
6	B7C0677C-E7D6-8E1A-98B2-AD423B1DD0D1	01	01
7	64F1EA74-D68C-37DA-7948-F4708FB87167	01	01
8	8C478661-7E8E-578E-E74D-2810C3E2407E	01	34

Historical data stored with processed activities:

- The Client Number, which is the ID of the user who processed the activity last.
- Actual financials and money exchange, if any.

Activity Types

The types of activities performed in the OIPA system are identified in the AsCodeActivityType table. These types should not be confused with the status of an activity, but used in conjunction with them, to understand how an activity was generated and what status the activity is currently in. Activities can be generated by an end user or the system may automatically generate activities because a dependent activity's data was changed.

To verify an activity's type you can run a query against the AsActivity table. The TypeCode column of this table tracks an activity's type.

Activity Type	TypeCode	Definition
Natural	01	<ul style="list-style-type: none"> Activity entered manually by a user. An activity that was spawned for the first time from a natural activity. A spawned activity even though system generated can be considered a natural activity because the user manually processed the activity that spawned it.
Reversal	02	<ul style="list-style-type: none"> Reversal activity that was created by an end user either manually deleting or recycling an activity. A spawned activity that was reversed because the originating activity was manually reversed.
Undo	03	This is a system generated reversal that was automatically performed by the system because an activity it was dependent on was changed. A Redo activity usually is generated with an Undo.
Redo	04	This is a system generated activity that was automatically created due to the generation of an Undo activity.
Deleted	05	<ul style="list-style-type: none"> Should not be in a production environment.

Activity Statuses

The following activity status terms are the fundamentals of activity processing and history records. They indicate at the activity level what the status of that activity record is. In comparison, the activity types section records the type of activity that was processed. The activity status, with the date stamp in current and history records, identifies the significant point of process and provides internal control for activities.

<u>Activity Status</u>	<u>Status Code (AsCodeStatus Table)</u>	<u>Processing Details</u>
Active	01	<p>Refers to current data that has completed activity processing and math calculation. This includes the following XML activities:</p> <ul style="list-style-type: none"> ➤ Develops XML process ➤ Changes to XML and table changes ➤ Inserts XML and writes to table
Pending	02	<p>Defined as information entered but not processed. Pending data requires action before applying to current processing and math calculation. All required data must be entered and the lighting bolt selected to change the status from pending to active.</p>
Shadowed	12	<p>Shadowed status is used for an activity that has been reversed. In OIPA, the term reverse refers to an activity that has been changed to Shadowed by a reversal activity. All updated data is set back to the original state before the activity that was shadowed was run.</p> <p>A reversal activity could be performed either by recycling or deleting an activity record.</p>
Pending Shadowed	34	<p>An activity whose data was entered, but never processed and then deleted.</p>
Pending NUV	13	<p>No Unit Value for System Date but there is a Unit Value for effective date of transaction.</p> <p>Processes all activity values except for the gain amount.</p> <p>Active - NUVs needed to calculate units and gain/loss.</p>
Pending Gain/Loss	14	<p>Active - NUVs needed to calculate gain/loss.</p>

Pending Status

An activity is in pending status when information for an activity is entered but not processed. No calculations or math has run for this activity yet.

An activity will be in a pending status because it was manually added or spawned but not processed. Verifying the TypeCode will indicate how the activity was processed. Either way the activity record will remain in pending status until it is processed. Once processed, the StatusCode will be updated in the database and the status listed in OIPA will reflect the new status.

Example

The CoverageCalculation activity was entered manually by selecting it from the activity drop-down box and then selecting the **Add** button.

The activity in OIPA in pending status:

The screenshot shows a web interface for managing activities. At the top, there is a green header bar with the word "Activity" and a help icon. Below the header, there is a form with the following elements:

- Activity:** A dropdown menu currently showing "CoverageCalculation".
- Add:** A button to add the selected activity.
- Auto-Process:** A checkbox that is currently unchecked.
- Process:** A button to process the activity.

Below the form is a table with the following columns: Activity(1), Activity Date, Status, Amount, Attachments, and Action. The table contains one row with the following data:

Activity(1)	Activity Date	Status	Amount	Attachments	Action
CoverageCalculation	05/01/2008	Pending			

A red arrow points to the "Pending" status in the table.

The activity record in AsActivity table stored the TypeCode 01 because it was manually entered and the StatusCode of 02 because it is pending. Remember if the activity was spawned it will be in a type code 01 as well.

```
4 SELECT * FROM AsActivity where policyguid='CC53B2A5-960D-E4A8-CEB1-AE1BDDCB42E0'
```

1 record(s) [Fetch MetaData: 0/ms] [Fetch Data: 0/ms]

	ActivityGUID	TypeCode	StatusCode	EffectiveDate
1	3CA7E66B-404C-56A0-1F49-F3616B239D94	01	02	5/1/2008 12:00

Active Status

An activity will be in an active status because the math calculations have processed and any resulting data is stored in the database. The activity also displays an active status on the Activity Screen in OIPA.

Activities can be manually processed by the end user with the lightening bolt, which puts it in an active status. They can also be put in an active status by using the process button or by checking Auto Process. The system will automatically process any pending activity by date through cycle or batch processing.

Example

The lighting bolt was selected for the CoverageCalculation activity. The activity processed and values are displayed for the activity on the Activity Details screen.

An activity in PAS that is in active status because the lighting bolt was selected:

Activity

Activity: ☐ Auto-Process

Activity[1]	Activity Date	Status	Amount	Attachments	Action
CoverageCalculation	05/01/2008	Active			

The activity record has TypCode of 01 because it was manually entered. The StatusCode has changed from 02 (pending status) to 01(active status).

```
4 SELECT * FROM AsActivity where policyguid='CC53B2A5-960D-E4A8-CEB1-AE1BDDCB42E0'
```



1 record(s) [Fetch MetaData: 0/ms] [Fetch Data: 0/ms]

	ActivityGUID	TypeCode	StatusCode	EffectiveD
1	3CA7E66B-404C-56A0-1F49-F3616B239D94	01	01	5/1/2008 12:00

Shadowed




An activity that has been recycled or deleted will be in a shadowed status.

Recycle Example

Selecting the  Recycle button associated with an activity creates two additional activities to be processed. The first is a reversal activity that has red reversal arrows  for its Activity Detail icon. The second activity replaces the original activity. The reversal activity must be processed prior to the new activity that will replace the original.

Step 1: Select the  recycle button for an activity.

Two pending activities are generated in OIPA for the reversal and new activity:

Activity						
Activity: <input type="text" value="DeathNotification"/>		<input type="button" value="Add"/>		<input type="checkbox"/> Auto-Process <input type="button" value="Process"/>		
Activity(3)	Activity Date	Status	Amount	Attachments	Action	
 CoverageCalculation	05/01/2008	Active			← The original activity	
 CoverageCalculation	05/01/2008	Pending			← The activity that will reverse the original	
 CoverageCalculation	04/20/2008	Pending			← The activity that will replace the original	

Two additional records are written to the database to track the reversal and new activity:

4 SELECT * FROM AsActivity where policyguid='CC53B2A5-960D-E4A8-CEB1-AE1BDDCB42E0'				
3:1	INS	[5/1/08 12:43:35 PM EDT] Script executed - (0) Errors [Time: 110ms]		
3 record(s) [Fetch MetaData: 0/ms] [Fetch Data: 0/ms]				
	ActivityGUID	TypeCode	StatusCode	Effectiv
1	1921A837-9224-3C59-9026-03C033AA5D10	01	02	4/20/2008 12:
2	3CA7E66B-404C-56A0-1F49-F3616B239D94	01	01	5/1/2008 12:0
3	AC8C51AF-809D-ECC8-A093-F4FB70590ED8	02	02	5/1/2008 12:

Step 2: Select the **Process** button for the reversal activity.

The status of the original activity is updated to shadow and the reversal activity status is updated to active.

Activity						
Activity:	CoverageCalculation	Add		<input type="checkbox"/> Auto-Process	Process	
Activity(3)	Activity Date	Status	Amount	Attachments	Action	
CoverageCalculation	05/01/2008	Active				
CoverageCalculation	05/01/2008	Shadow				
CoverageCalculation	04/20/2008	Pending				

The status of the original activity's record changes from 01(active) to 12(shadowed). The reversal activity changes from 02(pending) to 01(active).

4 SELECT * FROM AsActivity where policyguid='CC53B2A5-960D-E4A8-CEB1-AE1BDDCB42E0'						
3 record(s) [Fetch MetaData: 0/ms] [Fetch Data: 16/ms]						
	ActivityGUID	TypeCode	StatusCode	Effective		
1	1921A837-9224-3C59-9026-03C033AA5D10	01	02			
2	AC8C51AF-809D-ECC8-A093-F4FB70590ED8	02	01			
3	3CA7E66B-404C-56A0-1F49-F3616B239D94	01	12			

Step 3: Select the pending activity that has the correct information.

The activity's status changes from pending to active.


Activity						
Activity:	DeathNotification	Add		<input type="checkbox"/> Auto-Process	Process	
Activity(3)	Activity Date	Status	Amount	Attachments	Action	
CoverageCalculation	05/01/2008	Active				
CoverageCalculation	05/01/2008	Shadow				
CoverageCalculation	04/20/2008	Active				


The new activity's status changed from 02(pending) to 01(active).

4 SELECT * FROM AsActivity where policyguid='CC53B2A5-960D-E4A8-CEB1-AE1BDDCB42E0'						
3 record(s) [Fetch MetaData: 0/ms] [Fetch Data: 16/ms]						
	ActivityGUID	TypeCode	StatusCode	Effective		
1	1921A837-9224-3C59-9026-03C033AA5D10	01	01	4/20/2008 1		
2	AC8C51AF-809D-ECC8-A093-F4FB70590ED8	02	01	5/1/2008 12		
3	3CA7E66B-404C-56A0-1F49-F3616B239D94	01	12	5/1/2008 12		

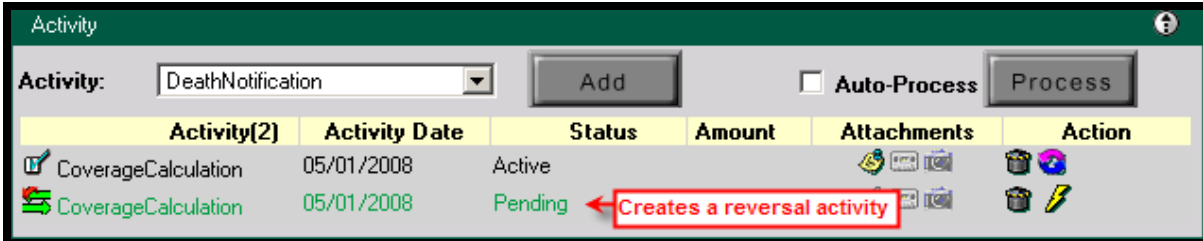
Note: If shadows and reversals are not checked in your filter display, you will not see these activities.

Delete Example

Selecting the  delete button associated with an activity generates a reversal activity. The reversal activity is in pending status and must be processed in order to delete the activity and place in a shadowed status.













Step 1: Select the  delete button associated with an activity.

A reversal activity is generated with a pending status.



Activity

Activity: ☐ Auto-Process

Activity(2)	Activity Date	Status	Amount	Attachments	Action
 CoverageCalculation	05/01/2008	Active		  	 
 CoverageCalculation	05/01/2008	Pending		  	 

Creates a reversal activity

There are now two records, one for the original activity and one for the reversal activity.

```

4 SELECT * FROM AsActivity where policyguid='B8015595-3B51-4BCC-C173-ADD71D00FD16'
1:11 OVR [5/1/08 5:08:54 PM EDT] Script executed - (0) Errors [Time: 109ms ]
2 record(s) [Fetch MetaData: 0/ms] [Fetch Data: 16/ms]

```

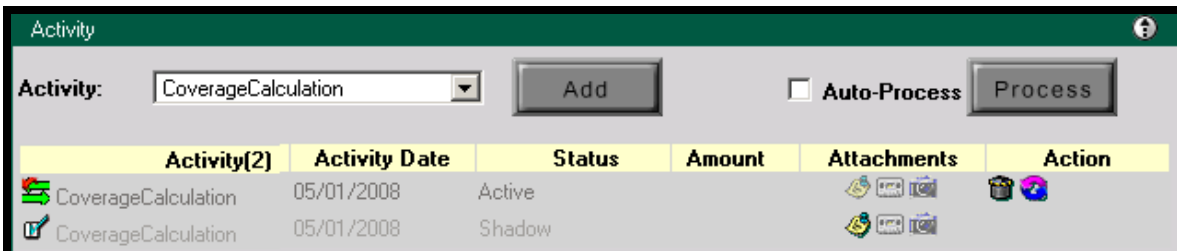
	Ac	TypeCode	StatusCode	EffectiveD
1	54842A45-C54D-DA97-3B8B-9DAB1808959D	01	01	5/1/2008 12:00
2		02	02	5/1/2008 12:00

The original active activity

The reversed activity in pending status













Step 2: Select the **Process** button associated with the reversal activity.

The original activity is then updated to shadowed status and the reversal activity is updated to active status.



Activity

Activity: ☐ Auto-Process

Activity(2)	Activity Date	Status	Amount	Attachments	Action
 CoverageCalculation	05/01/2008	Active		  	 
 CoverageCalculation	05/01/2008	Shadow		  	 

The original activity is then updated to 12(shadowed) and the reversal activity is updated to 01(active)status.

4 **SELECT * FROM AsActivity where policyguid='B8015595-3B51-4BCC-C173-ADD71D00FD16'**

2 record(s) [Fetch MetaData: 0/ms] [Fetch Data: 0/ms]

	ActivityGuid	TypeCode	StatusCode	EffectiveD
1	69C0823C-9C0B-8641-5F22-37CA6EE2EDE6	02	01	5/1/2008 12:00
2	54859D	01	12	5/1/2008 12:00

The active reversed activity (points to row 1)

The original activity in shadow status (points to row 2)

Note: The delete display filter does not control the viewing of deleted activities. An activity that is deleted will have a shadowed status. You will need to filter for shadowed activities to see those activities that were deleted. This filter displays the ability to delete activities via the trash can icon. **The delete option should not be available in a production environment.**

The Reversal Process

The reversal process in OIPA consists of an activity that is created to modify a processed activity. The reversal procedure allows changes to activities that could affect other processed activities. Using this functionality causes the system to respond by reversing all activities affected. The details will be maintained within the OIPA system.

1. Identify the activity to reverse.
2. Reverse the activity by selecting either the delete or recycle button.

Deleting

Reversing an activity can be performed using two different methods depending on the desired outcome.


If you want to reverse the activity and not replace it with the same type of activity, you should use the Delete icon. Deleting creates a new activity that is a “Reversal Activity.” This activity will change the status of the original activity to a Shadow status. All data that was updated by the original activity is updated with the original value.

Undo/Redo

Reversing (or backdating) any activity will cause most activities with a date LATER than the current activity to go through **Undo/Redo**. Undo and Redo are system generated activities that are created to correct any activities that were affected because they were dependent on a reversed activity’s data.

Note: You must process the Delete activity before the original activity is actually deleted.

Recycling

If you only need to update information stored in an activity, you can use the Recycle icon . Recycling reverses a current activity and allows you to replace incorrect information in the activity. This eliminates the step of having to re-enter the same activity with the corrected information. Recycling works identically to Deleting with the exception of scheduling a new activity to reprocess.

When clicked, the Recycle icon allows you to recycle or redo an activity if you need to change certain information that was originally entered. As a result, any activity that is spawned by this activity will be removed and regenerated upon reprocessing. The outcome of the recycle option is that a new and a reversal transaction are generated.

Activity Type and Status Table Examples

The following table explains the various TypeCode and Activity status combinations. It also lists the filters necessary to view the activity in OIPA on the Activity Screen.

Explanation	TypeCode	Activity Status	Activity Screen filters to view
A pending activity that has been processed by using the lightening bolt, auto process, or Process button.	01	01	Financial
An activity has been added and is in a pending status.	01	02	Financial
Historical record of an activity that was reversed.	01	12	Reversal & Shadow
A pending activity that was deleted.	01	34	Reversal & Shadow
A system generated reversal activity that has been processed.	02	01	Reversal & Shadow
A system generated reversal activity that has not been processed. This is generated when the Delete button is selected for an activity.	02	02	Financial
A reversal activity that was created by the system because a dependent activity was reversed.	03	01	Reversal & Shadow
An active system generated activity that was created because a dependent activity was recycled with new information.	04	01	Financial
A system generated activity that is in pending status. This activity was created because a dependent activity was recycled.	04	09	Financial
A system generated activity that was deleted while in pending status.	04	34	Shadows

Activity Processing Dates

The OIPA system controls activity processing through a timestamp in the table AsPolicy. This column is always GMT. When an activity is first being processed the timestamp is compared against the current time. When the timestamp is less than the current time, the timestamp will be updated and the activity will process. In the other scenario, when timestamp is not less than the current time, the asp page will refresh and display a dialog box stating, "Policy being modified by another user." Because the page is refreshed the current data will be displayed. The look-up and update of the timestamp is preformed within a transaction. This transaction will prevent another process from accessing this record until the transaction is complete. This prevents the same activity from being processed by two users.

Activity Processing Dates in AsActivity

dbo.AsActivity	
Columns	
ActivityGUID	
TransactionGUID	
TypeCode	
StatusCode	
EffectiveDate	Also known as the 'As Of' date. The date the business wants the activity to be active. The value of this date can be configured. The ability to back date the value of this date may be configured as well.
ActiveFromDate	Records the System Date from AsSystemDate when the activity was processed.
ActiveToDate	Records the System Date from AsSystemDate when the activity was reversed.
ClientNumber	
PolicyGUID	
RelatedGUID	
XMLData	
ProcessingOrder	
ErrorStatusCode	
SuspenseStatusCode	
ActivityGMT	Last time the activity ran.
EntryGMT	Initial creation time of activity, then updates when the activity goes from pending to active. Used like a running time stamp.
CREATIONGMT	Original creation of the activity.
ScheduleGUID	

Activity Processed on 1/5/05

Activity	TypeCode	StatusCode	EffectiveDate	ActiveFromDate	ActiveToDate
A1 Original activity	01 Natural	01 Active	1/5/05	1/5/05	NULL


Activity A1 Recycle on 1/6/05

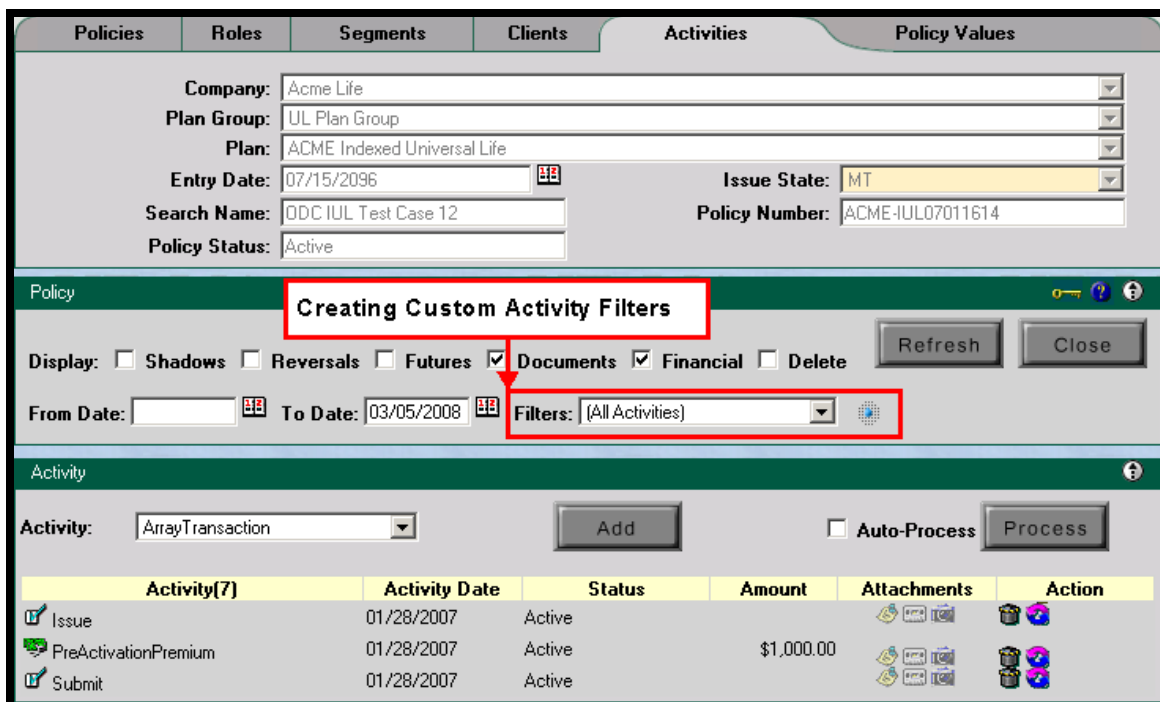
Activity	TypeCode	StatusCode	EffectiveDate	ActiveFromDate	ActiveToDate
A1 Original activity	01 Natural	01 Active	1/5/05	1/5/05	1/6/05
A2 Reversal activity	02 Reversal	01 Active	1/5/05	1/6/05	NULL
A3 New activity	04 Redo	01 Active	1/5/05	1/6/05	NULL

Activity Filters

Introduction

In OIPA end users and system administrators (configurors) can create custom activity filters. These filters can decrease the amount of time end users search through activities for specific work tasks.

On the Activity screen for a policy, you will see the filters drop-down box and the  create filter button. Users can select a pre configured filter from the drop down box. Available filters are any company, plan, security or user level filter. Each end user will only see their own user level custom filter, but will see any company, plan or security level filters that have been created.



The screenshot shows the Oracle Insurance OIPA Activity screen. The top navigation bar includes tabs for Policies, Roles, Segments, Clients, Activities, and Policy Values. The main form area is divided into several sections:

- Policy Information:** Fields for Company (Acme Life), Plan Group (UL Plan Group), Plan (ACME Indexed Universal Life), Entry Date (07/15/2096), Issue State (MT), Search Name (ODC IUL Test Case 12), Policy Number (ACME-IUL07011614), and Policy Status (Active).
- Policy Section:** A green header bar with the title "Creating Custom Activity Filters". Below it are checkboxes for Display: Shadows, Reversals, Futures, Documents (checked), Financial (checked), and Delete. There are also "Refresh" and "Close" buttons.
- Date Range:** Fields for "From Date" and "To Date" (03/05/2008). A "Filters" dropdown menu is set to "(All Activities)".
- Activity Section:** A green header bar with the title "Activity". Below it is a dropdown for "Activity" (ArrayTransaction), an "Add" button, an "Auto-Process" checkbox, and a "Process" button.
- Activity List Table:** A table with columns: Activity(7), Activity Date, Status, Amount, Attachments, and Action. It lists three activities: Issue, PreActivationPremium, and Submit, all dated 01/28/2007 and in an "Active" status. The PreActivationPremium activity has an amount of \$1,000.00.

Security and Filters

A user's security level controls the type of filters available, if any. Users will still be able to select filters to use even if they can't create them.

In the security XML for a security role the following applies to Activity Filters:

- The <AsActivity> section needs to have the <Button>FilterActivity</Button> for the user to be able to use the button.

XML Example



```
<AsActivity>
  <Fields></Fields>
  <Buttons>
    <Button>Add</Button>
    <Button>AddActivity</Button>
    <Button>Process</Button>
    <Button>ProcessAll</Button>
    <Button>ProcessAttachments</Button>
    <Button>DeleteOrReverse</Button>
    <Button>RecycleActivity</Button>
    <Button>ProcessActivity</Button>
    <Button>FilterActivity</Button>
  </Buttons>
```

- The <AsActivityFilter> section has to list the Save and Delete buttons for them to be active and usable.

XML Example

```
<AsActivityFilter>
  <Fields></Fields>
  <Buttons>
    <Button>Save</Button>
    <Button>Delete</Button>
  </Buttons>
</AsActivityFilter>
```

Steps to Create a Filter

1. Go to the Activities Tab.
2. Select the  create filter button.
3. Select the Filter Level for the custom filter.
 - a. Company Level
 - b. Plan Level
 - c. Security Level
 - d. User Level
4. Keep the New Activity Filter in the All User Filters drop-down box.
5. Enter a Filter Name.
6. Select the type of transactions to be effected and then the  button, to move to the Selected Transaction(s) box.
7. Repeat step 6 for all transactions.
8. Select whether the filter will include or exclude the transactions.
9. Select the **Save** button.