

**Liberty Health**

**Deployment Process for Changes**

**Project: Commissions Self-Build**

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LIFE INVESTMENTS HEALTH CORPORATE PROPERTIES ADVICE

DOCUMENT HISTORY

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| --- | --- | --- | --- | --- |
| Version | Date | Status | Amended by | Changes |
| 1.0 | 20-09-2018 | Draft | Tanya Percy | Initial Version |
| 1.1 | 04-10-2018 | Updated | Tanya Percy | New changes for CAB 04-Oct-2018 |
| 1.2 | 4 Oct 2018 | Additions | Sarel Eybers | PL/SQL changes added |
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# Overview

1. The purpose of this task is to assemble all the information that is required to describe the design of a software component into a complete Design Specification. This task is not a substitute for executing the individual design tasks. This specification work product can serve as a structure for completing the design for each component by providing pointers back into the Design Tasks:   
   - DS.040 Develop Design Architecture Description  
   - DS.080 Design Software Components  
   - DS.090 Design Data  
   - DS.100 Design Behavior  
   - DS.130 Design User Interface

As part of the commission's self-build project various tickets and issues have been raised through the UAT testing carried out by the business.

These changes include "House Keeping" changes where the changes were more cosmetic and to improve upon data integrity and validation processes on the self-build application.

The majority of the changes are completed within the ADF framework, but there are various PL/SQL dependencies.

Additional changes to be completed for the Database changes, have been documented with the ticket references.

# Build Components

The build components are broken down into the following:

1. ADF Application Update - deployment of the EAR (Enterprise Archive) file.
2. Data fixes
3. Database Objects

Deployment will start with the DB objects and data fixes and thereafter the EAR file deployment to the WebLogic Server.

PL/SQL changes are placed in order in the change request document inside CSB repository:

C:\JDeveloper\mywork\repo\Liberty\scripts\Change Requests\To Do\LS-1654 - Draaiboek - Deploy Application Code\change\_request.sql

It will be compiled line by line (Ctrl-Enter) as opposed to full compile (F5).

The reasoning behind this is to be able to stop and roll-back if needed earlier, rather than later and with less impact caused. File has been ordered specifically with higher dependencies in mind.

Only once it has been confirmed that PL/SQL changes have succeeded,

will the instruction be given to

Deploy the EAR file to production.

# ADF Self Build Application Change

Breakdown of the various changes:

**LS-1373: Correspondence Contact and Address information**

1. Address type validation on the Administration screen.
2. Add a separate tab for the correspondence Address and Correspondence Contact
3. Put validation in around the updating of the effective start and end dates
4. Only allow for one correspondence address and correspondence contact to exist for a broker at any point in time.

**LS-1372: Watch list**

The commission test runs were displaying incorrectly, however a test case could not be identified.

The changes included in this ticket is an improvement to the performance of the Watch list, as it was taking a long time to render. Improvement made to the commissions run view object.

**LS-1367: Display WHT codes**

Request to display the Withholding tax codes on the payments screen.

**LS-1358: Allow for search ability on Country for the Broker**

Added search criteria to the screen

**LS-1345: Change the Commission Run History page and the Commission Run Pages**

The search ability, general navigation and performance of the pages were not user friendly and or performant.

The pages have been amended to assist the business with search ability, performance is improved upon and the export of information enable the business to perform their reconciliation functions.

**LS-1816: Housekeeping**

For general issues raised in testing this ticket was created, to assist with look and feel and or validation changes which have no major impact on the functioning of the application.

* Prevent additional countries from being added to local brokerages.
* General - adding filters and or sort ability on screens to assist the users with their navigation.
* Add last update date for changes on comm % screen
* Ensure that the created by and auth user information is different for the comms % approvals
* Add the Number of lives to the Employer Group screen to fix number of policies, and reflect number of lives for the businesses use.

**LS-1997: Broker Statement**

It was raised that the effective start and end dates should not be mandatory for all correspondence bar the broker statement.

Changes were made to enforce the mandatory nature of the dates based on the template selected.

**LS-1996: Accreditation**

An error was raised for issues end dating the accreditation. This however proved not to be an issue, as the end date must be on or after the effective start date.

On review however it was identified that there could be an issue with end dating of an accreditation type if the accreditation information has already been captured for a broker and or brokerage. Therefore validation was put in to ensure that the accreditation type cannot be end dated if it exists on the system.

**LS-1827: Create Country Taxes table and supporting structures**

The requirement is to allow the business user to capture the withholding tax percentages per country, and to not allow for overlapping date ranges.

The additional menu has been added to the administration portion and is implemented via the database script in the deployment process:

Insert\_into\_menu\_tables.sql

**LS-1342: Enable Capturing Company Country Correspondence**

In the ADF self-build application two extra fragments were exposed on both the Address and contact levels for the brokerage.

The correspondence information is critical for any communication to the relevant brokers and the Documaker system has a major dependency on this information.

The screens were built to ensure that only one correspondence address and contact can exist for a multinational broker and one per country for the local brokers.

The information is governed by the relevant effective start and end dates, and on capturing the information any prior records which follow the logic as above are end dated accordingly.

The requirement also existed that the business must be able to update the contact and or address information in the event that the information was captured incorrectly. The business user now has the ability to update only the currently active record, so that new records do not need to be added each and every time an amendment to the data needs to be completed.

**LS-1998: comms payments received error**

The underlying entity object was synchronised to the database table columns to ensure that the payment type column was added as it is part of the PK. The attribute was then added to the view object to match the underlying EO which handles the database DML operations.

Pick up the new Payment type from the AR report and interpret it in the commissions run to only calculate commission on certain types and not on others.

ALTER TABLE "LHHCOM"."COMMS\_PAYMENTS\_RECEIVED"

ADD "PAYMENT\_TYPE"

UPDATE "LHHCOM"."COMMS\_PAYMENTS\_RECEIVED" SET PAYMENT\_TYPE = ' ';

ALTER TABLE "LHHCOM"."COMMS\_PAYMENTS\_RECEIVED"

ADD CONSTRAINT "COMMS\_PAYMENTS\_RECEIVED\_PK" PRIMARY KEY

comms\_calc\_pkg.sql;

**LHSD-37934: Broker Auto Feed to Fusion**

Company and Company Country triggers had to be amended to be able to ensure that the company id is placed in the DNLD table for Fusion to pick it up.

COMPANY\_COUNTRY\_AUDIT\_TRG.sql;

COMPANY\_AUDIT\_BEFORE\_TRG.sql

**LS-1361: Interfaces from Self Build to Fusion - Uganda**

Fields added to invoice and calculated in the commission approvals procedure indicate to Fusion which WHT to apply.

ALTER TABLE "LHHCOM"."INVOICE"

ALTER TABLE "LHHCOM"."INVOICE\_AUDIT"

INVOICE\_AUDIT\_BEFORE\_TRG.sql;

comms\_calc\_pkg.sql;

**LS-1362: Interfaces from Fusion to Self-Build - Uganda**

Getting the Invoice Payment back from Fusion and updating payment info. Also storing the extra data for Documaker and Cognos to pick up.

invoice\_payments.sql;

invoice\_payments\_audit.sql;

invoice\_payments\_idx.sql;

invoice\_payments\_aud\_idx.sql;

INVOICE\_PAYMENTS\_AUDIT\_BEF\_TRG.sql;

commissions\_pkg.sql;

comms\_calc\_pkg.sql;

**LS-1366: OHI Policy Broker Load - Broker on Group**

Enable Brokers to also be loaded on Group level and not only at Policy level. This is a duplicate of LS-1860 (which has been deployed a week ago already).

**LS-1513: Data Migration to Commissions**

Draaiboek Step. Header record. No code deployment neccesary.

**LS-1520: Uganda: Data Migration - Commission rates upload**

Draaiboek Execute Step. This has already been done as part of Draaiboek. 30 September 2018.

Sign-off received from Louise W

**LS-1602: Draaiboek - Create Tables in LHHCOM schema**

Draaiboek Check Step. No code deployment neccesary.

**LS-1606: Draaiboek - Create Triggers in UTIL schema**

Draaiboek Check Step. No code deployment neccesary.

**LS-1614: Draaiboek - Create Triggers in LHHCOM schema**

Draaiboek Check Step. No code deployment neccesary.

**LS-1617: Draaiboek - Create Sequences in UTIL schema**

Draaiboek Check Step. No code deployment neccesary.

**LS-1625: Draaiboek - Create Sequences in LHHCOM schema**

Draaiboek Check Step. No code deployment neccesary.

**LS-1645: Draaiboek - Compile Packages and Functions in UTIL schema**

Draaiboek Check Step. No code deployment neccesary.

**LS-1646: Draaiboek - Compile Packages and Functions in LHHCOM schema**

Draaiboek Check Step. No code deployment neccesary.

**LS-1649: Draaiboek - prePopulate Configuration tables with Defaults**

Draaiboek Check Step. No code deployment neccesary.

**LS-1651: Draaiboek - Check Application Access to DB**

Draaiboek Check Step. No code deployment neccesary.

**LS-1653: Draaiboek - prePopulate Static Data tables**

Draaiboek Check Step. No code deployment neccesary.

**LS-1654: Draaiboek - Deploy Application Code**

Draaiboek Check Step. This is the request that all this Jira request folder that is being used to deploy all of this code in one go.

C:\JDeveloper\mywork\repo\Liberty\scripts\Change Requests\To Do\LS-1654 - Draaiboek - Deploy Application Code\change\_request.sql

**LS-1857: Draaiboek - Run script to sync brokers from Commissions to Policies**

Draaiboek Execute Step. This has already been done as part of Draaiboek. 30 September 2018.

**LS-2011: Individual member sent to Commission with no Group details**

OHI sends Individual members to Fusion with the policy code in the group code field. This caused the commission calculation to fail as it was not a valid group code. The exception to the rule was made that if the group code contains the policy code, we must treat it as if the correct group code was sent.

comms\_calc\_pkg.sql;

# Data fixes

Insert the menu structures into the relevant tables to expose the country taxes menu for the Administration portion on the ADF self-build application.\*\*Note no material impact therefore no regression plan required.

Script: Insert\_into\_menu\_tables.sql

Insert a space into the new PAYMENT\_TYPE on COMMS\_PAYMENTS\_RECEIVED

This is to be able to use the payment type as part of the PK. No existing data fields are modified, so simply dropping the column will suffice as a rollback plan.

Script:

UPDATE "LHHCOM"."COMMS\_PAYMENTS\_RECEIVED"

SET PAYMENT\_TYPE = ' ';

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# Database Objects

To enforce the check that additional countries (as per ADF detail section) cannot be added for a local brokerage, and procedure was created which is used by the application:

**New Procedures and Functions:**

iscompany\_multinational.prc

Provide procedure calls to the Documaker team to expose correspondence information, to ensure accuracy of information when extracting the information from Self-Build and to allow for ease of maintenance going forward. If any of the DB structures change then only the procedures need to be amended accordingly.

get\_corr\_address\_prc.sql;

get\_corr\_contact\_prc.sql;

get\_comp\_template.sql;

With relevant **Grants**:

GRANT EXECUTE ON LHHCOM.get\_comp\_template TO LHHCORR;

GRANT EXECUTE ON LHHCOM.get\_corr\_address TO LHHCORR;

GRANT EXECUTE ON LHHCOM.get\_corr\_contact TO LHHCORR;

**Trigger changes:**

Errors were being raised when users tried to update two or more fields are the brokerage screen, the error was due to a local variable defined as varchar2(1), was being updated by the trigger to contain more than 1 char, and there was a size error.

COMPANY\_AUDIT\_BEFORE\_TRG.sql

COMPANY\_COUNTRY\_AUDIT\_TRG.sql

INVOICE\_AUDIT\_BEFORE\_TRG.sql;

DBA to compile the above under the LHHCOM schema.

commissions\_pkg.sql;

**Table Changes**

Addition of a new column added to INVOICE to allow for withholding tax information:

ALTER TABLE "LHHCOM"."INVOICE"

ADD "INVOICE\_TAX\_CODES" VARCHAR2(50 BYTE);

ALTER TABLE "LHHCOM"."INVOICE\_AUDIT"

ADD "INVOICE\_TAX\_CODES" VARCHAR2(50 BYTE);

Amend the trigger: INVOICE\_AUDIT\_BEFORE\_TRG.sql

# Rollback or Regression Processes

**For the ADF changes:**

Take a copy of the EAR file prior to updating of the new EAR file. Copies of the EAR files are stored on server side.

If there are issues the prior EAR file must be loaded onto the WLS server for the Commission Home application.

**For data fixes:**

Remove the line that was added

**Table changes and triggers**

ALTER TABLE LHHCOM.INVOICE DROP INVOICE\_TAX\_CODES;

ALTER TABLE LHHCOM.INVOICE DROP INVOICE\_TAX\_CODES;

INVOICE\_PAYMENTS and INVOICE\_PAYMENTS\_AUDIT have no dependancies, so they can be dropped or just left (zero impact if they are not dropped)

ALTER TABLE "LHHCOM"."COMMS\_PAYMENTS\_RECEIVED"

DROP CONSTRAINT "COMMS\_PAYMENTS\_RECEIVED\_PK";

ALTER TABLE "LHHCOM"."COMMS\_PAYMENTS\_RECEIVED" DROP PAYMENT\_TYPE;

ALTER TABLE "LHHCOM"."COMMS\_PAYMENTS\_RECEIVED"

ADD CONSTRAINT "COMMS\_PAYMENTS\_RECEIVED\_PK" PRIMARY KEY

("APPLICATION\_ID",

"GROUP\_CODE",

"PRODUCT\_CODE",

"COUNTRY\_CODE",

"POLICY\_CODE",

"PERSON\_CODE",

"CONTRIBUTION\_DATE",

"FINANCE\_RECEIPT\_NO",

"FINANCE\_RECEIPT\_DATE");

**Procedures and Functions**

These are new and will only get called when required, so no major impact. If the code is incorrect and / or not supplying the correct information the fix can be provided through a script. Otherwise they could just as easily be dropped.

**Packages**

Any DB changes that need to be rolled back will mean that the current version of the affected package will need to be recompiled again.

If the change request is compiled line for line (Ctrl-Enter in SQL Developer) package lines will not be compiled if an error is picked up earlier.

# Open and Closed Issues

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| Issue | Risk | Mitigating factors | Raised By | Raised on |
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