



Qualified Minor Change

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PS_MINORCHNG_QUAL
Application 15239
DNAapp ID 65e27c7d-2615-41ba-8d38-19ccd381c8a7

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Overview:

The Qualified Minor Change application searches for accounts (in a product specified by the financial institution) that have been opened (based on the contract date) a number of days (based on a runtime parameter), less than a number of years (based on a runtime parameter). For example, if five (5) years is used with 30 days, an account will be processed 30 days before the account is five (5) years old. At that time, a notice will be created, and the product will be scheduled for a minor change.

Key Benefits:

This application evaluates and inserts a future dated minor change based upon run time parameters on selected deposit accounts. The application produces a detailed report and also has the capability to produce a notice prior to the minor change.

Processing:

The PS_MINORCHNG_QUAL batch application searches for all accounts with a major account type code equal to the major account type code specified in the “Major Account Type Code” (MJCD) parameter and a current minor account type code equal to the minor account type code specified in the “Minor Account Type Code” (MICD) parameter. It only selects accounts with a status code specified in the “Account Statuses to Include” (DRST) parameter.

This application calculates the minor change date by adding the number of years specified in the “Number of Years” (8NOY) parameter to the contract date of an account. If the resulting date is between the current effective date of the queue and the current effective date of the queue plus the number of days specified in the “Number of Days” (DAYS) parameter, then the account is selected for notice generation, and the account minor is scheduled to change into the minor account type code specified in the “New Minor Account Type” (8NMI) parameter on the calculated date.

If the product change is already scheduled correctly, the account is skipped.

If the product is already scheduled to change, and the scheduled change does not match the calculated minor change date, or the minor account type code specified in the “New Minor Account Type” (8NMI) parameter, an exception is reported and no changes are made to the account.

Parameters:

Parameter	Code	Description (how used)	Required	Default
RptOnly_YN	RPT	When set to “Y”, no changes are made to the database. When set to “N”, the database is updated.	No	Y

Parameter	Code	Description (how used)	Required	Default
Account Statuses To Include	DRST	A comma delimited list of account status codes. Only accounts with a current account status code matching an account status code in this list will be included. If let blank, the current account status will be ignored.	No	<Blank>
Major Account Type Code	MJCD	A single major account type code. Only accounts with a major account type code matching the major account type code in this parameter will be included.	Yes	<Blank>
Minor Account Type Code	MICD	A single minor account type code. Only accounts with a current minor account type code matching the minor account type code in this parameter will be included.	Yes	<Blank>
New Minor Account Type	8NMI	A single minor account type code. Accounts that meet the requirements to be changed into a new minor will be changed into the minor account type code specified in this parameter.	Yes	<Blank>
Number of Years	8NOY	A minor change will be scheduled for this number of years from the contract date of the account.	Yes	<Blank>
Number of Days	DAYS	The number of days before the calculated minor change date to create a notice and schedule the minor change.	Yes	<Blank>
Branch Addressing YN	BRAD	When this is set to "Y", Branch Addressing is used on the notices.	No	N
Sort No-Mails to Front	SNOM	When this is set to "Y" = Sort No-Mail Letters To Front. N= Do Not Sort. Do not sort no-mail letters to the front.	No	N

Entity Attribute:

The following account entity attribute will be used by the application to store the account's Date of Last Contact prior to the minor change.

Entity Attribute	Code	Description (how used)	Data Type	Default
Minor Change Date of Last Contact	8MCD	Entity attribute that will store the account's date of last contact prior to the scheduled minor change.	DATE	<BLANK>

Updating Applications

Non-Transaction Updating Applications

This application updates activity, using the following Activity Category and Activity Type

Activity:

Activity Category	Code	Activity Type	Code	Activity Subject
Account Maintenance	AMNT	Minor Change	MCHG	Account
Account Maintenance	AMNT	Account	ACCT	Account

Scheduling information:

- This minor change application should be scheduled to run prior to DP_CDM and PS_RESET_DLC.
- The application cannot be run back in time.

Notices:

This application supports the following notice text markers. These marker works with a Financial Institution provided text file.

Notice Marker	Description
ACCT	The account number
ACTP	The name of the old product
BANK	The name of the financial institution or branch
CUST	The name of the customer/member
DATE	The data of the report run in MM-DD-YYYY format
FONE	The phone number of the financial institution or branch
LDTE	The formatted date of the report run (i.e., September 10, 2010)
PROD	The name of the new account product
SALU	The customer/member name and salutation (i.e., Mr. John Smith)
SEQN	The sequence number of the current letter
DTE1	The contract date of the account
DTE2	The minor change date

Variables:

This application uses the following notice variables, under the calculation type of “8CMN – Minor Change Notice” and calculation category “**NTCE** - Customer Notices”

Variable Type	Code
Minor Change Notice	8CMN

Variable	Code	Description (how used)	Data Type	Default
Address Column	ADCL	The column to begin printing the address.	INTG	12
Address Line	ADLN	The line to begin printing the address.	INTG	14

Variable	Code	Description (how used)	Data Type	Default
Institution name/address column	BNCL	The column to begin printing the institution (or branch) name and address.	NUM	1
Institution name/address Indicator	BNIN	Indicates if the institution (or branch) name, phone number, and address are printed. Y = Yes. Print the name, phone number, and address. N = No. Do not print the name, phone number, and address.	YN	N
Institution name/address line	BNLN	The line to begin printing the institution (or branch) name and address.	NUM	2
Max institution name/address lines	BNMX	The maximum number of lines for the institution (or branch) name and address.	NUM	5
Input file column	IFCL	Input file column	NUM	5
Input file line length	IFLE	Input file line length	NUM	75
Input file print line	IFLN	Input file print line	NUM	30
Maximum Address Size	MXAD	The maximum number of lines for the address.	INTG	5
Page Number Column	PNCL	The column to print the page number.	INTG	58
Page Number Indicator	PNIN	Indicates if the page number is printed. Y = Yes. The page number is printed. N = No. The page number is not printed.	YN	N
Page Number Line	PNLN	The line to print the page number.	INTG	3
Page Number Text	PNTX	The institution-defined text printed prior to the page number.	CHAR	Page Number:
Sequence Number Column	SQCL	The column to print the sequence number.	NUM	2
Sequence Number Indicator	SQIN	Sequence Number Indicator Indicates if the sequence number is printed. Y = Yes. Print the sequence number. N = No. Do not print the sequence number.	YN	Y
Sequence Number Line	SQLN	The line to start printing the sequence number.	NUM	45
Sequence Number Text	SQTX	The institution-defined text printed in front of the sequence number.	CHAR	Sequence Number

Report:

Bank: 0001 Test Institution	Qualified Minor Change	Run Date: 12-11-2020
Report: PS_MINORCHNG_QUAL		Post Date: 12-11-2020
Queue Number : 105849		Run Time: 05:05:40
Application Number: 15239		Cash Box:
Queue Sub Number : 2		
SCHEMA OSIBANK		
DATABASE NAME CS14.WORLD		
RELEASE DNA 4.6.2.0		
12-11-2020 02:38:59 PM 860498 G:\OSI\BANK\SQT\4620\BAT_EXE\PS\		
REPORT PARAMETERS		
Account Statuses To Include: ACT,CLS		
Branch Addressing YN: N		
Major Account Type Code: SAV		
Minor Account Type Code: PL01		
New Minor Account Type: PL99		
Number of Days : 40		
Number of Years: 1		
RptOnly_YN: N		
Sort No-Mails to Front: N		
Bank: 0001 Test Institution	Qualified Minor Change	Run Date: 12-11-2020
Report: PS_MINORCHNG_QUAL		Post Date: 12-11-2020
		Page: 1 of 1
Account Number	Contract Date	Minor Change Date
7227534474	01-09-2020	01-09-2021
7227534523	01-10-2020	01-10-2021
7227534531	01-10-2020	01-10-2021
Accounts: 3		
Total Notices Produced: 3		
Exceptions: 0		

- Output report will include the totals at the end of the report.

Exceptions:

Condition	Exception Messages
The account already has a minor change scheduled and the new minor type, or the effective date, does not match what was calculated by this application.	Invalid minor change scheduled.

Configuration Checklist:

Item	Test Environment	Production Environment
Parameters		
Notice Variables		
Notice Text File		

Installation:

Note: If you obtained this application from the DNAappstore, please disregard the installation instructions below. If you did not obtain this application from the DNAappstore, please complete the installation instructions below.

- Copy PS_MINORCHNG_QUAL.SQT to the Batch Process to the PS batch application directory; this is typically G:\OSI\BANK\BAT_EXE\PS (or the location specified in the PS Batch Report Directory 'BATP' Institution Option).
- This application requires the running of the script PS_MINORCHNG_QUAL_install.SQL (Setup Script) and PS_MINORCHNG_QUAL_DDL.SQL: Copy this file to any directory accessible to the applicable SQL application (SQL Developer, PL/SQL Developer, etc.) You need to run the setup script to register the application.
- This application requires an Authorization Key. After the primary installation instructions have been completed, you must apply the supplied Authorization Key for this application.
- To enter the Authorization Key, go to Services >> System >> Institution >> Applications >> Application Manager.
- This application includes custom stored procedures PACK_PS_COMMON_PACK_WRAP.SQL, PACK_PS_COMMON_PBOD_WRAP.SQL that need to be loaded on the database. As with any stored procedure, please do not load it while the system is in ONLINE mode, or while batch is running. To load the stored procedures please use the Oracle Object Manager in the SAF Resource Kit.

To download Resource Kit: On Extranet, go to Core --> SAF --> SAF Resource Kit Releases --> 'latest release' --> Download File. This will install the resource kit.

To run the utilities: Start --> All Programs --> Open Solutions Resource Kit will open windows explorer showing various utilities. Open OracleObjectManager and launch OSI.SafRk.OracleObjectManager.exe.

The SAF Resource Kit tools use Oracle client and therefore should preferably be run from App Server -- or at least from a machine that has Oracle client installed on it.

Revisions:

Date	App Version #	Change
01/2021	1.0.0.0	Modified to write into entity attribute used by PS_RESET_DLC and to deliver PS_RESET_DLC along with this application.
08/2020	1.0.0.0	Changed label to Fiserv Confidential
03/2020	1.0.0.0	Added count for number of notices printed
02/2018	1.0.0.0	Documentation update - Added Fiserv Confidential Label
08/2015	1.0.0.0	Application Created