

Oracle Insurance

**Data Capture
Release Notes**

Release 4.4.5

September 2010

Oracle Insurance Data Capture Release Notes for Release 4.4.5

The purpose of this document is to:

Describe the new features and resolved issues offered in the Oracle Insurance Data Capture Release 4.4.5. This document also provides a history of enhancements and bug fixes from past releases.

RELEASE 4.4.5

NEW FEATURE

| Ref # | Area Impacted | Description |
|------------------|---------------|--|
| INGA-1193 | System | The Oracle Insurance Data Capture Palette UI has been improved. The terminology and flow have been updated to more accurately reflect the actions and purpose. These updates also align with the terminology and look and feel of other Oracle Insurance product family. |

Summary of Terminology Changes:

| Current | New |
|---|---------------------------------------|
| SYSTEM WIDE | |
| Oracle Insurance Data Capture Designer | Oracle Insurance Data Capture Palette |
| iDesigner | Oracle Insurance Data Capture Palette |
| Update (button) [new Tab item] | Create (button) |
| Back (button) | Done (button) |
| Insert (button) | Create (button) |
| Tag | Name |
| Tag Name | Name |
| Menu Option→Manage Questionnaire | |
| Manage Interfaces | Manage Questionnaire |
| Workflow→Workflow Setup | Workflow→Page Navigation Setup |
| Menu Option→Risk Categories | |
| Risk Item(s) | Risk Category(ies) |
| Risk Item Assignment | Risk Category Assignment |
| Base Types | Base Category |
| Association References | Category Association |
| Interface Overrides | Questionnaire Overrides |
| Menu Option→Tabs | |
| Views [Tabs] | Tabs |
| View Type | Tab Type |
| Rating Compare [Tab Type] | Data Collection |
| Quote Summary [Tab Type] | Summary |
| Quote Detail [Tab Type] | Detail |
| Generic [Tab Type] | Custom |
| Menu Option→Questions | |
| Response Map | Answer Map |

| Current | New |
|------------------------------------|--|
| Condition | Display Condition |
| Conditional Parent Value | Display Condition |
| Description | Text |
| Rule ID | Rule Engine Input ID |
| Menu Option→Releases | |
| (Release) Label | Release Name |
| Menu Option→Workbench | |
| Views [Customer List Quote List] | Workbench [Customer List Quote List] |

ISSUE RESOLUTION

No issues were resolved in Oracle Insurance Data Capture Release 4.4.5.

RELEASE 4.4.1

NEW FEATURE

No new features were introduced in Oracle Insurance Data Capture Release 4.4.1.

ISSUE RESOLUTION

The following issues have been resolved in Oracle Insurance Data Capture Release 4.4.1.

| Ref # | Area Impacted | Description |
|------------------|---------------|---|
| INGA-9 | System | A customer requested that they wanted to see log information for callout data imported into the OI DC system. An enhancement was implemented that now allows the customer to filter the log to better find the data they need. An additional enhancement was implemented that allows the customer to delete records in the log list up to a specified date. |
| INGA-1083 | System | A customer wanted to import data that had not been mapped properly for import. The mapping was done according to customer requirements and the data is now importing properly. |
| INGA-1086 | System | Callout data was not being properly imported and resulted in a loss of data. |
| INGA-1000 | Questionnaire | When users attempted to delete the driver instance, an error message was displayed and when the page refreshed, some of the information was either missing or reset to an incorrect value. A change was made to the system and this error no longer occurs. |
| INGA-1066 | Questionnaire | The default indicator for a postback question type was being displayed on a customer questionnaire but they did not want it to display. The configuration option for turning off this indicator was set to no longer show it. |
| INGA-1082 | Questionnaire | A customer reported that in application mode, two fields were not available on the initial navigation to a tab in Questionnaire. The fields would be displayed after a refresh or an exit from the tab. This issue has been corrected and the fields are now visible on initial entry. |

RELEASE 4.4

NEW FEATURE

No new features were introduced in Oracle Insurance Data Capture Release 4.4.

ISSUE RESOLUTION

The following issues have been resolved in Oracle Insurance Data Capture Release 4.4.

| Ref # | Area Impacted | Description |
|----------|---------------|---|
| INGA-619 | System | Overall system performance was improved with a primary focus on page to page transitions and external callout integrations. |

UPGRADE INSTALLATION STEPS

When upgrading to Release 4.4, there is one new step to be performed on the installation server and two system steps to be performed prior to allowing users into Data Capture Release 4.4.

| Steps | Description |
|---|---|
| As part of the installation process, the virtual directory needs to be deleted and re-created. | Step to Perform: The Virtual Directory will need to be deleted and re-created after the application pool creation. This new step is detailed in the Installation Guide. |
| After installing the upgrade, users should not generate a quote on a system that has not had a release generated. | Step to Perform: System Administrators must generate a release prior to generating a quote on an updated system. They must also change references to "id" in BaseCategories and Associations configuration to "tag". BaseCategory and Associations are config options found when editing a RiskItemCategory in Designer. |
| After installing the upgrade, columns displayed in previous versions will not be displayed in upgraded release 4.4. | Step to Perform: Previous versions relied on fixed columns hard coded into the system. Column selection is no longer fixed in release 4.4. System Administrators can choose the columns to be displayed from the views tab in Designer. |

AGENT RATER RETRO DEFECTS

The following issues regarding Agent Rater have been resolved in Oracle Insurance Data Capture Release 4.4.

| Ref # | Area Impacted | Description |
|----------|---------------|--|
| INGA-304 | Questionnaire | A customer reported that they were experiencing an error in handling complex conditional question that prevented data from being properly mapped to a custom extension and resulted in errors during rating. A non owned policy was not rated. |
| INGA-340 | System | A customer received an error when they attempted to bind a policy after an import and deletion of drivers. |
| INGA-456 | System | A customer reported that a thin file credit score was rating correctly via Agent Rater but rated incorrectly as via SIS. |
| INGA-287 | System | A customer reported that a VIN callout was not executing correctly and failed to populate the vehicle information. |

KNOWN ISSUES

The following are known issues in Oracle Insurance Data Capture Release 4.4.

| Known Issues | Workaround/Description |
|--|---|
| When Oracle Insurance Insbridge Rating and Underwriting is being utilized, OIDC users are allowed to enter data ranges that are unacceptable ranges to the Insbridge data base. For example, a date such as 06/04/1000 can be accepted by OIDC and then rejected by Insbridge. | Workaround: Business Analyst implementing an OIDC interface should specify acceptable date ranges using OIDC Designer. |

RELEASE 4.3

NEW FEATURE

The following new feature has been added to Oracle Insurance Data Capture Release 4.3.

| Ref # | Area Impacted | Description |
|-----------------|---------------|--|
| INGA-398 | Designer | Customer list views can be defined by system users. Users can select the columns that are displayed and choose the non-displayed fields that are searchable. |
| INGA-398 | Designer | Client list views can be defined by system users. Users can select the columns that are displayed and choose the non-displayed fields that are searchable. |
| INGA-465 | Designer | Lines of business can be created in Designer. Hierarchical custom lines of business can be created, edited and deleted in Designer. |
| INGA-468 | Designer | Risk Items can be created in Designer. Hierarchical custom risk items can be created, edited and deleted in Designer. |
| INGA-529 | Designer | Oracle Insurance Data Capture is compatible with Oracle Insurance Insbridge Rating and Underwriting Release 3.13. |
| INGA-530 | Designer | Designer supports Microsoft SQL Server 2005 Express. |
| INGA-532 | Questionnaire | Microsoft SQL Server 2000 compatibility mode is no longer supported. |

ISSUE RESOLUTION

The following issues have resolved in Oracle Insurance Data Capture Release 4.3.

| Ref # | Area Impacted | Description |
|-----------------|---------------|---|
| INGA-450 | Designer | UserRoles can be passed over URL. The system now allows for UserRoles to be specified via URL string. The HTTP Header variable will take precedence, however if not set, then the system will look for the value on the URL string. |

RELEASE 4.2.1

NEW FEATURE

The following new feature has been added to Oracle Insurance Data Capture Release 4.2.1.

| Ref # | Area Impacted | Description |
|-------|---------------|---|
| 3160 | iDesigner | Editable Risk Item Table enhancement. An editable Risk item table has been added to the controls used on the interface. |

ISSUE RESOLUTION

The following issues have resolved in Oracle Insurance Data Capture Release 4.2.1.

| Ref # | Area Impacted | Description |
|-------|----------------|---|
| 2342 | iQuestionnaire | Customer reported that the Mailing Address Street Number and Name were missing from the <Start an Application> "Applicant" screen. The Mailing Address Street Number and Name are now displayed properly. |
| 2348 | iQuestionnaire | "I Agree" was added to the <Continue with Application> button on the credit score Confirmation screen per customer request. |
| 2351 | iQuestionnaire | Users are now able to add a lien holder with "no collision" or "other than collision" per customer request. |
| 2352 | iQuestionnaire | Customer reported that the OTC and Collision deductibles fields were not available when you chose "No" for the garaging/mailling address question on the Vehicles page. These fields are now available. |
| 2353 | iQuestionnaire | Customer reported that if users did not enter information on the initial navigation to the Vehicle screen, the Additional Interest option was no longer available. The Additional Interest option is now available. |
| 2357 | iQuestionnaire | Customer reported that when utilizing the AccuAuto Bridge, International drivers licenses were not mapping properly to the Driver tab. This has been corrected. |
| 2358 | iQuestionnaire | Questions pertaining to the Driver's Training course were not available when additional drivers were added to the policy. These questions will now be displayed when additional drivers are added. |
| 2364 | iQuestionnaire | Customer reported that Reconciliation should have happened behind the scenes and should not have been shown on the screen for duplicates. Reconciliation issues have been resolved. |
| 2365 | iQuestionnaire | If users skipped "Drivers added by CLUE" and then went to the PersAuto tab, the drivers that were entered disappeared. This issue has been fixed and drivers no longer disappear. |

| Ref # | Area Impacted | Description |
|-------|----------------|--|
| 2601 | iQuestionnaire | Customer reported that a PO Box was acceptable for the garaging address. Now a physical address is required when users enter a garaging address. PO Boxes are no longer acceptable for garaging addresses. |
| 2746 | iQuestionnaire | Customer reported that Users were able to navigate from the Vehicles screen to the Application Details screen during the Application entry. The Application Details screen is now available only when users navigate through the required screens to reach it. |
| 2748 | iQuestionnaire | Customer reported that a thin file credit score of 080 is rated correctly via AgentRater, but rated incorrectly as a no-hit via SIS. This has been fixed and now rates correctly via SIS. |
| 2987 | iQuestionnaire | Customer reported that loss payee information was not bridged over correctly from Accuauto. Now loss payee information is bridged over correctly. |
| 2989 | iQuestionnaire | Customer reported that incorrect premiums were displayed if Drivers or Vehicles were skipped. Now if users skip any required item, an error message will be displayed and users will be returned to the first failed item to correct the information. |
| 2905 | Search | Search by ID was not functioning as it should. Users can now search by ID. |

KNOWN ISSUES

The following are known issues in Oracle Insurance Data Capture Release 4.2.1.

| Known Issues | Workaround/Description |
|---|--|
| Cannot reorder question groups within a view. | Workaround: Un-assign question groups and then reassign in correct order. |
| Cannot assign question groups to a view if work area title is missing. | Workaround: This defect manifests itself only for an upgrade from Agent Rater to OI DC. For existing views, please update the work area title. This field is required when creating a new view. |
| Cannot enter special characters single quote (') and double quote (") in text fields. | Details: This issue is under evaluation and may be addressed in a future release. |
| For migration from Agent rater to OI DC, one lead ID is skipped. | Details: If previous lead ID in Agent Rater was 2345, after upgrading to OI DC the newly created lead will have an ID of 2347 instead of 2346. |
| In certain IE7 environments, the URL is displayed in the status bar of a dialog box. | Fix: Add the OI DC URL to the trusted sites. |
| In certain environments, the uninstall of OI DC will fail on the first attempt. | Workaround: Cancel out of uninstall and retry. In most cases, uninstall is successful on the second attempt. |

RELEASE 4.2

NEW FEATURES

The following new features have been added to Oracle Insurance Data Capture Release 4.2.

| Ref # | Area Impacted | Description |
|-----------------|----------------|--|
| Internal | iDesigner | Updates to iDesigner: View LOB has been added. |
| Internal | iDesigner | Updates to iDesigner: View Risk Items has been added. |
| Internal | iDesigner | Updates to iDesigner: View Interface has been added. |
| Internal | iDesigner | Updates to iDesigner: Manage Views has been added. |
| Internal | iDesigner | Updates to iDesigner: Import Risk Item Schema has been added. |
| Internal | iDesigner | Updates to iDesigner: Import arconfig.xml has been added. |
| 2684 | iQuestionnaire | The information of a logged in user can now be passed to a field in Questionnaire. |
| 2557 | iQuestionnaire | When leadid is passed in request string, the Customer Workbench link will be hidden. |
| 2534 | iQuestionnaire | Add support to import a quote via query string for CRMOnDemand. |
| 2535 | iQuestionnaire | Adding support to submit quote to CRMOnDemand. |
| 2536 | iQuestionnaire | Adding support to establish Session with CRMOnDemand via SSOToken exchange. |
| Internal | iQuestionnaire | Added ability to flag quotes with custom status. |
| Internal | iQuestionnaire | Added Security feature with fixed roles. |
| Internal | iQuestionnaire | Added ability to clone quotes. |
| Internal | iQuestionnaire | Agent Workbench has been split from Customer Workbench. |

ISSUE RESOLUTION

The following issues have resolved in Oracle Insurance Data Capture Release 4.2.

| Ref # | Area Impacted | Description |
|-------|----------------|---|
| 2832 | iQuestionnaire | A customer reported that when they selected Proof of Prior coverage on the Discounts screen, the "Working" message is displayed until you navigate to another field. This is fixed. |
| 2830 | iQuestionnaire | On the Quote and Application pages, the years licensed value is automatically populated for the primary and additional driver. |
| 2770 | iQuestionnaire | Towing and Labor and Rental Reimbursement coverages are now available. The premiums are shown for the vehicles that have these coverages. |
| 2352 | System | If you chose to add a garaging address, the OTC and Collision deductibles fields were not available. Users were forced to exit the screen and then return in order to enter in values. Now when you choose to add a garaging/mailling address, the deductible fields are available. |
| 2357 | System | When selecting an international drivers license, the state field was not mapping properly. The state field now displays the correct code for an international drivers license. |
| 2470 | System | "Ghost" drivers were added after ChoicePoint MVR callout that returned a "failed" report. This issue has been corrected. |
| 2473 | System | When rating a new or re-rating an existing policy, users were unable to generate a rating input for 'TIH' via service interface (DirectConnectWSI) for rate service (TIH_AUTO_SC). This issue has been corrected. |
| 2500 | System | Users who created a new quote and advanced to the Discounts page would be frozen when they selected "Yes" at the "Six Months of continuous coverage?" question. Users can now advance without freezing up. |
| 2525 | System | Future Accidents and Violations dates could be entered. Accidents and violation must be in the past now. No future accidents or violations can be entered. |
| 2526 | System | Users were able to enter two vehicles with the same VIN#. Users can no longer enter the same VIN# in the same policy. |
| 2358 | System | Question pertaining to the Driver's Training course were not available when additional drivers were added to the policy. This issue has been fixed. |
| 2353 | System | If information is not entered on the Vehicle screen, the Additional Interest option is not available. This issue has been fixed. |
| 2775 | System | Excluded driver and Non driver options are not available upon initial entry of the Driver screen for the named insured. Options were displayed if the user re-entered the screen. All options that should be listed are now listed on the Driver screen. |
| 2328 | System | When users entered an age but not a birth date and proceeded through to rating, the Years Licensed rules mapping error was not displayed. Now users must enter a birth date. |
| 2580 | System | A data conversion error from Insbridge was thrown when a driver license containing more than 9 digits was submitted. The policy would not rate. The application now uses the proper validation for this type of field and rates correctly. |
| 2351 | System | Users were able to add a lien holder with no collision or something other than collision. This has been corrected. A lien holder cannot be added unless collision is selected. |

| Ref # | Area Impacted | Description |
|-------|----------------|---|
| 2601 | System | If the address was a PO Box, the garaging address was not requiring a physical address from the user. This has been changed. A PO box requires a physical address from the user. |
| 2858 | System | When creating a lead, the navigation went from the Vehicles screen to directly to Application Details Screen. This issue was corrected and no longer occurs. |
| 2681 | iDesigner | Help Text was not display on Questionnaire. Help text is now being displayed for the question that contains help information. |
| 2478 | iQuestionnaire | Users were not able to see the quotes, including cloned ones, in a quote list for newly created leads. Users can now see this information. |
| 2347 | iQuestionnaire | When all the leads are deleted from the Admin page, an error was thrown. Users can now delete all lead individually. Lead management has been removed from the UI. Users can delete all the leads individually. |
| 2455 | iQuestionnaire | Users could not edit a lead Id that contained special character (dash). Lead management has been removed from the UI. Users can now edit leads as needed. |
| 2583 | iQuestionnaire | The default start page was not being displayed once a policy was imported. This has been corrected. The default page is the customer workbench and after importing a lead, the default page is the Applicant tab of the import. |
| 2593 | iQuestionnaire | A new lead creation failed once all the leads were deleted from the system. This has been fixed. New leads can be created even if all leads were deleted from the system. |
| 2330 | iQuestionnaire | An exception error was thrown from Callout manager when opening an existing lead in Application mode. Callout feature is now working as expected. No errors are being thrown. |
| 2447 | iQuestionnaire | The save option was missing when attempting to save a lead. This has been fixed. Save is now in the menu options. |
| 2456 | iQuestionnaire | LeadID could not be updated. Lead management has been removed from the UI. |
| 2334 | iQuestionnaire | Required fields did not have a red * in front of it. This has been fixed. Required fields have a red asterisk on the right of the entry field at page startup so the user can see which fields are required. |
| 2849 | iQuestionnaire | On the Administration page, the Rating Services page was not being displayed. This has been fixed. The Rating Services link is in place and functioning properly. |
| 2850 | iQuestionnaire | On the Administration tab, the update and cancel buttons were missing from the Variables page. This has been fixed. The update and cancel buttons are in place and functioning properly. |
| 2595 | iQuestionnaire | A Session Timeout was occurring when users clicked on a Customer or Quote from Administration after updating the Variables screen. Updating variable will cause the session to re-start. Users will now be asked if they want to re-start their session after applying changes. |



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Author: Mary Elizabeth Wiger

Contributing Authors:

Oracle Corporation
World Headquarters
500 Oracle Parkway
Redwood Shores, CA 94065
U.S.A.

Worldwide Inquiries:

Phone: +1.650.506.7000

Fax: +1.650.506.7200

oracle.com

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