

**Oracle® Insurance Rules  
Palette**

**Release Notes**

**Oracle Insurance Policy  
Administration**

Version 9.6.0.0

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## Oracle Insurance Rules Palette Release Notes

The Oracle Insurance Rules Palette is a standalone application that can be used in conjunction with Oracle Insurance applications. The Rules Palette allows users to create and configure business rules that support their business process model. Plans hold related policies that share a set of business rules, plan rules, requirements, transactions, segments, plan data and plan values. Copybook functionality enables transactions and business rules to be used across multiple plans, leveraging existing information and reducing configuration time.

These release notes contain the enhancements that were made to the Oracle Insurance Rules Palette GA release 9.6.0.0, 2012.

### Customer Support

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## Enhancements in the Oracle Insurance Rules Palette

This section describes enhancements that were made to the Oracle Insurance Rules Palette GA release 9.6.0.0.

### Activity Filters

The Rules Palette now supports the ability to create and configure filters to control which activities are available on each OIPA activity screen. These filters are controlled via the new **Activity Filter** node in the Admin Explorer. Right-clicking this node will present the **New Activity Filter** option, which will launch the **Add New Activity Filter** wizard upon selection. In the wizard, the user can specify the type, level and name of an activity filter.

### Allocations

When configuring an Allocation Model, an Asset Class' **Fund** drop-down box is now disabled until an Asset Class is selected from the **Asset Class** drop-down box. The **Percent Lock** checkbox has also been added to Allocation

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Model configuration, and can be used to specify whether the fund percentages are required to add up to 100%. Even if Percent Lock is unchecked, the total value of the funds cannot exceed 100%.

### **Assignments**

A new assignment type, Transfer, is now available. This assignment type is used to transfer all funds from a From allocation to a To allocation. This functionality depends on the attached ReassignAllocations rule, which, unlike other allocation rules, does not require a <From> element since all funds are being transferred. Transfer also uses a new attribute, NETTRANSFER, which dictates whether only the net difference between the From and To funds should be transferred (if set to “Yes”), or if the entire amount should be transferred from one fund, and then the applicable amount transferred back into the same fund (if set to “No”—a gross transfer).

### **Comments**

Two new business rules, CommentScreen and CommentSearchScreen, have been added, which allow an OIPA user to create and search for comments, respectively. Comments are able to be added at the field, screen, segment, policy, activity and client levels. The necessary security configuration to support these business rules has been added in the Admin Explorer. Additionally, The Rules Palette now supports the ability to create comment templates in order to ease and enhance the commenting process in OIPA. These templates are supported for release management.

### **Debugging**

The ability now exists to debug client-level transactions. The functionality is the same as that used for debugging policy-level transactions. The existing web service security used by policy transaction debugging extends to client transaction debugging.

The Debug pane for transactions now contains enhanced navigation buttons, which are used to step through transaction debugging.

For Point-in-Time valuation, the Rules Palette Debug pane now displays the date the depositing activity put the money in the fixed fund as the Deposit Date.

### **Detached Migration**

The Rules Palette now supports the ability to perform Detached Migration. Detached Migration is the process of deploying database information to a target environment with an IVS database that is neither shared nor connected to the source environment's IVS database. To access the new Detached Migration option from the Rules Palette Tools menu, a user will need to have the new security privilege Detached Migration—Deploy.

### **Difference Reports**

The Rules Palette now supports the ability to generate two types of diff reports, which compare the entities (e.g. business rules, transactions, segments) in one environment to those in another, revealing any differences. Summary diff reports compare all entities of the selected type(s) in the two environments, while detailed diff reports compare a single, specific entity. If the two environments share an IVS database, additional information will be included in the report, such as the date and time that the entity was last modified. Additionally, summary diff reports can be exported as a .csv file, and an entity's XML for the source and/or target environment can be exported as a .txt file.

### **Fields**

Fixed fields, dynamic fields, and multifields can now be disabled, and therefore prevented from being enabled, by using the <Disabled> element with a value of Yes. Multiple fields can be enabled or disabled at once using Client type and/or Address role as criteria. Additionally, the ACTIONTYPE attribute of the <Action> element can now be given the value DISABLEALL. This value disables all fields within a configuration section (e.g. configuration of a single client type or address role). DISABLEALL can only be used with the ONLOAD event type. Despite the above functionality, some fields cannot be disabled:

- ClientScreen's TypeCode and LegalResidenceCountryCode fixed fields
- AddressScreen's AddressRoleCode, CountryCode, EffectiveDate and ExpirationDate fixed fields

### **Funds**

A new type of child fund, the lateral fund, has been added to OIPA. Lateral funds are date-driven. To support this new fund type, two new elements, <LateralFunds> and <LateralFundFields>, are now supported on the FundScreen business rule. <LateralFunds> identifies the parent fund types with which the lateral funds may be associated, while <LateralFundFields> designates dynamic fields that sub-categorize lateral funds.

The system now supports 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, which 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.

### **Inquiry Enhancements**

Inquiries that are accessed via policy-type screens (e.g. Policy, Policy Roles, Policy Activity, etc.) can now be overridden at any of the following levels:

- Subsidiary Company
- Subsidiary Company and State
- Plan Group
- Plan Group and State
- Plan
- Plan and State

### **Masking**

Masking for fields and results tables is now achieved through the MASK attribute of a field's DataType element, and by assigning security groups to a mask level for specific screens. Additionally, masking is now supported on the search screens for Policy, Client, Suspense, Disbursement and Disbursement Approval.

### **Math**

Ten new math functions are now available in OIPA, allowing enhanced string manipulations. An explanation of each new function is provided in the XML Configuration Guide.

- **StringLength**
- **Concatenate**
- **Left** and **Right**
- **RemoveLeft** and **RemoveRight**
- **PadLeft** and **PadRight**
- **IndexOf**
- **Substring**

A new math variable type, XPATH, is now supported. This math variable type is used in the configuration of Outbound Service Calls (OSCs). A new math

variable DataType, XML, is also now supported. This datatype is to be used with the Value and Field math variable types.

A new math variable type, SUSPENSEFIELD, is now supported in screen math. This math variable type allows suspense information entered or selected on the Activity Details screen to be accessible in the corresponding activity's screen math, actions and transaction math. This enables transactions to evaluate the suspense information, perform validations, and execute calculations with the details pertaining to the suspense information for the transaction.

### **Outbound Service Calls**

OIPA now supports the ability to capture a failure message returned from an OSC after an activity has been successfully processed. This maintains integrity between the OIPA activity and the OSC extension. OSCs can also be called to alert downstream systems that an OIPA activity has been reversed. Additionally, OSCs are now supported on all application servers (they were previously only supported on WebLogic).

### **Plan Group Overrides**

Plan Groups can now be overridden at the primary company level using the Override Wizard (previously only available at the child company level).

### **Policy**

A new element, <AutoSelect>, can now be added to the PolicySearchScreen business rule. When this element is given a value of Yes, it will cause a policy search in OIPA returning a single result to automatically load that policy's Policy screen or Policy Overview screen, depending on configuration.

The fixed fields of the PolicySearchScreen business rule are now configurable.

A new business rule, DuplicatePolicy, has been added. When configured to do so, this rule prevents users from entering policies with the same policy name and/or policy number as an existing policy record in the database. DuplicatePolicy is currently only configurable in the XML Source pane.

The PolicyScreen business rule's <AutomaticPolicyNumber> element can now be given a value of **Optional**. This new value makes the Policy Number field on OIPA's Policy screen optional—a user may enter a policy number



manually, but if the field is left blank, then a number will be generated automatically. If the policy is created via AsFile, but the policy number is not specified, then the system can automatically generate a policy number.

### Rates

The rate loading process has been enhanced in order to provide a more efficient and user-friendly method of loading rates into the Rules Palette via an Excel spreadsheet. Enhancements include:

- For each set of rates, the Rules Palette now only needs the location of the Legend in the rate import spreadsheet. This implementation requires the Legend to exist in a specific location on the first sheet of the upload workbook.
- Multiple rate sets and rate groups can be imported in a single session.
- The Rules Palette can overwrite a rate set for a given rate group via spreadsheet import.
- The New Rate Group wizard has been replaced with the Update Rate Group wizard.

The errors presented in the Validation Errors pop-up during the rate upload process are now able to be copied to the clipboard.

### Release Management

Release packages will now be moved to the “Deployed” node upon deployment. If a package needs to be added to an additional environment within the same IVS database, it will remain in the “Ready to Promote” node.

An additional step has been added to the Rules Palette release management process—prior to deployment, a release package now requires approval in the target environment before it can be deployed. Only a user with the new security privilege Release Package—ApprovePromotion can approve a release package. The approval is performed by right-clicking on a release package in the target environment and selecting the new **Approve Promotion** option.

The Rules Palette now supports the ability to perform Detached Migration. Detached Migration is the process of deploying database information to a target environment with an IVS database that is neither shared nor connected to the source environment’s IVS database. To access the **Detached Migration** option from the Rules Palette **Tools** menu, a user will need to have the new security privilege **Detached Migration—Deploy**.

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## Roles

Visual configuration for the Ordinal element is now available on the RoleScreen pane of the RoleScreen business rule. This element is used to control the display order of roles on the Policy screen in OIPA.

The Roles pane for segments and the PolicyScreen business rule now allows visual configuration of external client roles. This pane now contains the External Client field, with which the user can specify that a given role corresponds with an external client. An external client is a client with data stored within a database that is not able to be modified by OIPA.

The RoleScreen business rule now has a Role Views pane, with visual editing support for configuring a Summary Table of Roles on the Role screen in OIPA.

The RoleScreen business rule configuration can now define whether the roles available when adding or finding a client should display as a drop-down field or a series of checkboxes.

## Scheduled Computation

The ScheduledValuation business rule has been enhanced to provide the option to perform scheduled computation. If a <Computation> element is present in the rule, then scheduled computation will be performed. The absence of the element indicates that scheduled valuation should be performed. A new computation rule was also created to identify the scheduled computation processing requirements.

## Transactions

If an assignment type that does not require the MoneyType element is added on the Assignment pane, then the MoneyType element will not be added to the XML. The MoneyType element is only added when the money type is actually selected.

Transaction MultiFields can now be configured with their own set of OnLoad, OnChange, and/or OnSubmit events. This is accomplished by using the new MULTIFIELD attribute of the <Action> element. The value of this attribute is the name that will be used to identify the MultiField in Events configuration.

Other additions to support this new functionality are:

- The new INDEX attribute of the <Action> element.
- The new, built-in MultiValueFieldIndex variable, which is to be used in <Condition> tags. This variable can also be configured for substitutions in error/warning messages.

### **Upgrade Utility**

The Upgrade Utility is available for users upgrading from 9.4 to 9.5. This utility provides an automated method for updating XML syntax in order to combat backwards compatibility issues.

### **Valuation**

Point-in-Time valuation now uses un-rounded values, as opposed to rounded values, in order to improve backwards compatibility. The rounded values are still stored, and are used for display purposes.

Redemption fees can now be processed during withdrawal. This functionality was available in OIPA Versions 7 and 8, but has been implemented with greater flexibility in this release.

### **Verification Screen Enhancements**

OIPA's Verification screen can now be configured to perform a number of new functions:

- Display error numbers for any errors that are returned
- Override errors
- Save activities
- Selectively save an activity for specific hard errors (i.e. disable the OK button based on an error or set of errors)
- Define expressions returned by the system as either warnings or errors (configured in the ValidateExpressions business rule)

Additionally, the buttons available on the Activity Detail screen are now configurable.

### **Visual Editing**

In the Fields pane and Math pane, multiple lines of configuration can now be cut/copied/pasted/deleted using keyboard shortcuts (Ctrl-X, Ctrl-C, Ctrl-V, Ctrl-D respectively). **Cut**, **Copy**, and **Paste** buttons are also now available on these panes.

## Deprecated Items

The database table and business rules that formerly supported Unit Link Fund Processing have become obsolete, and have been removed. The following business rules are no longer supported:

- ApplyFundLien
- ExpireFundLien
- FundLienAmountFormula

The <AllowComments> tag was deprecated. This tag was added to the Transaction element in release 9.4.0.0 to indicate whether an activity allowed comments. This functionality was replaced by the CommentsScreen business rule.

The following comment-related buttons are no longer supported, and should be removed from the AsAuthTransactionButton table:

- AddComment
- DeleteAllComments
- DeleteUserCommentsOnly
- UpdateAllComments
- UpdateUserCommentsOnly
- ViewAllComments
- ViewAllCommentsHistory
- ViewUserCommentsHistoryOnly
- ViewUserCommentsOnly

## Technology Specific Enhancements

Java was upgraded to JDK 1.6 Update 32.