

# **Oracle® Insurance Policy Administration**

## **Release Notes**

Version 9.6.0.0

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## Oracle Insurance Policy Administration

Oracle Insurance Policy Administration (OIPA) is a next-generation, flexible, rules-based insurance solution for life and annuities that supports policy processing across multiple lines of business. OIPA greatly enhances ease of use and speed for business analysts, actuaries and others involved in the product configuration process. Robust navigation also makes it easy for users, including CSRs, to locate policy information and drill down into a granular level of customer detail. This allows insurers to respond more rapidly to customer inquiries, reduce call times and improve customer service.

These release notes contain the enhancements that were made to Oracle Insurance Policy Administration GA release 9.6.0.0, 2013.

### Customer Support

If you have any questions about the installation or use of our products, please visit the My Oracle Support website: <https://support.oracle.com>, or call (800) 223-1711.

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## Oracle Insurance Policy Administration

This section describes configuration, features and technology specific enhancements for GA release 9.6.0.0.

### Activities

Client-level activities can now be spawned from the ClientScreen. This allows activities to be generated based on updates to client records. If the value in a trigger field is changed, a warning message will be generated to alert the user that a new activity was created. Activities created in this manner still need to be processed manually on the Activity screen.

The availability of activities on individual activity screens is now controlled via filters configured in the Rules Palette.

OIPA's Verification screen can now be accessed via the new **Verify** button on the Activity Detail screen, and can be configured to perform a number of new functions:

- Display error numbers for any errors that are returned.
- Override errors from the Verification screen.
- Save activities from the Verification screen.
- Selectively save an activity for specific hard errors (i.e. disable the OK button based on an error or set of errors).

### **Comments**

Comments are now supported for policies, segments, clients, activities and suspense information. All comments relating to a particular policy or client can be viewed on a single screen. Comments can also be categorized and filtered, and comment templates can be created to expedite the commenting process.

### **Funds**

A new type of child fund, the lateral fund, has been added to OIPA. Lateral funds are date-driven.

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.

### **Inquiry**

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

Additionally, the formatting of inquiry reports has been updated in order to enhance usability.

### **Installation**

The Oracle Installer utility was created to perform the installation process for clients using the WebLogic application server and Oracle databases. The supported installation components include Cycle, OIPA and the Rules Palette Web Application Utility for the 9.6.0.0.0 release. The installer allows users to

visually modify the system properties file, cycle properties files and the Web Application Utility properties. All necessary files are packaged with the installer to streamline the installation process, with the exception of the swing-x jar files, which must be manually added. In the event that an error occurs, the installer is able to roll back the installation process.

### **Masking**

Field masking has been extended to the search screens for Policy, Client, Suspense, Disbursement and Disbursement Approval.

### **Outbound Service Calls**

OIPA now supports the ability to capture a failure message returned from an Outbound Service Connector (OSC) after an activity is successfully processed. This allows OIPA to maintain integrity between the activity and the OSC extension. Other OSC enhancements for this release include:

- OSC is now supported on all application servers (previously only supported on WebLogic).
- The user now has the ability to choose if subsequent activities should process while the OSC extension is processing, or if they should be processed when the OSC is finished processing.
- OSC can now be called to alert downstream systems that an OIPA activity has been reversed/undone.

### **Policy**

If configured to do so, policy searches that return a single result will now automatically load the Policy screen or Policy Overview screen (depending on configuration) for that policy.

The results page of a policy search can now display more than five columns. Additional columns are viewable by using the horizontal scroll bar beneath the search results.

The Policy Number field on the Policy screen can now be configured in the Rules Palette to be an optional field. A user may enter a policy number manually, but if the field is left blank, then a number will be generated automatically. Additionally, if the policy is created via AsFile, but the policy number is not specified, then the system can automatically generate a policy number.

### **Roles**

Role views can now be configured using a new visual editing tab in the RoleScreen rule. It allows a user to designate specific role views in the Summary Table of Roles on the Role screen.

### **Scheduled Computation**

Scheduled Computation can now be run at the plan level. This provides the ability to calculate values on policies or segments that do not have a variable component.

### **Suspense**

Suspense information entered or selected on the Activity Details screen of a transaction is now accessible in the 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.

### **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.

- The utility should function in a non-IVS environment. The user will require no special privilege to log into the utility in a non-IVS environment.

## **Technology Specific Enhancements**

- Java was upgraded to JDK 1.6 Update 32.

## **Deprecated Items**

No OIPA items were deprecated in this release.

## **Supported Technology**

The OIPA 9.6.0.0 application supports the following technology components:

### **Application Servers**

- WebSphere 7.0.0.25
- WebLogic 10.3.6.0

**Databases**

- Oracle 11g (11.2.0.3)
- Microsoft SQL Server 2008 R2 SP1
- DB2 9.7 Fix Pack 6

**Operating Systems**

- 64-bit Oracle Enterprise Linux 5.8 for all application servers and databases
- 64-bit Windows Server 2008 R2 SP1 for Microsoft SQL Server 2008 R2 SP1

**Java**

- JDK: 1.6.0 Update 32

**Browser**

- Internet Explorer Version: IE8