

Oracle Tax Analytics

Release Notes

Release 2.0.0

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Chapter 1

Preface

The *Oracle Tax Analytics Release Notes* provide an overview of the content and known issues in Oracle Tax Analytics 2.0.0.

Audience

Oracle Tax Analytics Release Notes is intended for anyone installing or using Oracle Tax Analytics.

Documentation and Related Resources

Oracle Tax Analytics Documentation Set

The Oracle Tax Analytics documentation set includes the following documents:

- *Oracle Tax Analytics Release Notes*
- *Oracle Tax Analytics Quick Install Guide*
- *Oracle Tax Analytics Installation Guide*
- *Oracle Tax Analytics Implementation Guide*
- *Oracle Tax Analytics Reference Guide*

Oracle Technology Network

Visit the Oracle Technology Network (OTN) to access demos, whitepapers, Oracle By Example (OBE) tutorials, updated Oracle documentation, and other collateral.

Registering on OTN

You must register online before using OTN. Registration is free and can be done at www.oracle.com/technetwork/index.html

Oracle Documentation on OTN

The Oracle Documentation site on OTN provides access to Oracle documentation. After you have a user name and password for OTN, you can go directly to the documentation section of the OTN Web site at www.oracle.com/technetwork/indexes/documentation/index.html

Oracle Support

Oracle customers have access to electronic support through My Oracle Support.

Document Conventions

The following text conventions are used in this document:

Table 1: Documentation Conventions

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Chapter 2

Release Notes

About This Release

Oracle Tax Analytics is a pre-built Enterprise Data Warehouse solution. The pre-built content includes:

- Oracle Tax Data Model, which includes the Foundation Layer and the models for Predictive and Operational analytics.
- Dashboards, reports, metrics, and key performance indicators (KPI).

Oracle Tax Analytics consists of three separately licensable products, namely.

1. Oracle Tax Registration Analytics
2. Oracle Tax Accounting Analytics
3. Oracle Tax Collections Analytics

Each licensable product includes the pre-built Oracle Tax Data Model and the pre-built operational dashboards, reports, metrics.

Oracle Tax Registration Analytics

Registration Analytics provide an agency with information to understand how their taxpayer base is changing. Typical questions answered by registration analytics are:

- How many new businesses registered this month? What is their primary industry segment?
- How many businesses closed this month? What was their industry segment? What was the reason for closure? What is the geographical distribution of the closed businesses?
- What are the types of taxes that are being registered?

Oracle Tax Accounting Analytics

Tax Accounting Analytics provides operational analytics on taxpayer accounting data (such as tax, penalty, interest assessments, waivers given, write offs made, payments, offsets, and any other credits allocated to assessments) to respond to questions such as:

- Are assessed and collected taxes on target for this year? How does this year compare to last year? How do assessments compare to payment collections over the last 12 months?
- How do actual payments received compare to targeted payment collections? What is the percentage breakdown of payments by tax type?
- What is the tax balance? What is its age? What is the breakdown of the balance by tax type, by geography, by taxpayer type?

Oracle Tax Collections Analytics

In this release, Tax Collections Analytics focuses specifically on the Outstanding Debt of the Revenue Management agency. These operational analytics on outstanding debt are intended to respond to questions such as:

- What is the gross outstanding debt for this period? Has it increased or decreased this the last period? What is the percentage change?
- How much of the debt is in dispute?
- How much of the debt belongs to bankrupt taxpayers?
- What is the debt that the agency can pursue and hope to collect?

Support and Certification Notices

Oracle Tax Analytics Release 2.0.0 is certified on:

- Oracle Database 11g Release 2 Enterprise Edition (11.2.0.2)
- Oracle Data Integrator Enterprise Edition 11g (11.1.1.6.0)
- Oracle Business Intelligence Enterprise Edition 11.1.1.6.0 and Scorecard and Strategy Management
- Oracle Data Mining 11.2.0.2 is supported

Known Issues

This section describes known issues in Oracle Tax Analytics 2.0.0. Patches for these issues will be released at a later date.

Issues in Internet Explorer Browser

When using Internet Explorer 7 or 8, some reports are not visible. This is a known issue for OBIEE and can be fixed by applying OBIEE Patch Number 13388423.

Registration

- The sorting of the columns in the KPI Watchlist on the KPI page, does not work as expected. (Bug Number 14554697).
- In the Closed Businesses by Close Reason report, clicking on the graph bars is supposed to display a pop up with action link that takes the user to the Closed Business Inventory report. This pop up doesn't always appear. (Bug 14730107)

- The Total Sales Amount of 300 Largest Companies report on the Business Trends page of the Registration Dashboard, is showing information for all taxpayers that have sales volume data and not just businesses. A filter for taxpayer type of 'BSNS' is missing. (Bug Number 14730401)
- When drilling down from the Month Level to Week or Day Level in the Business Bankruptcies report on the Business Trends page, the information shown is incorrect. This is due to an error in the population of the Bankruptcy Non Person Count metric in the Tax Registration Day Aggregate. (Bug Number 14403710)
- When reporting across multiple time periods (*e.g.*, two tax years), taxpayers are reported multiple times. This applies to the Active Taxpayer, Closed Non Person Count, and Bankruptcy Non Person metrics. In addition, taxpayers with multiple tax registration records in the aggregated period will be counted multiple times. (Bug Number 16394572)

Taxpayer Accounting

- In the Assessments by Assessment Type report on the Summary page, the size of the bar for Total Assessed does not change according to the new value. When the slider is moved from one tax type to another, the hover text changes to display the updated Total Assessed (as per new value). The size of the bar, however, remains the same. (Bug Number 14730958)
- In the Tax Map report on the Tax page, the variable shapes for the metric '# of Active Taxpayers' are not shown when a filter of Account Type or Obligation Type are chosen. (Bug Number 14723671)
- In the Penalty by Reason and Taxpayer Type on the Penalty page, incorrect hover text is shown. The hover text shown is the one belonging to the adjacent bar. (Bug Number 14736802)
- Using the Interest Assessment Type filter on the Interest page, causes the Age of Interest Balance and Size of Interest Balance reports not to display. Using the Penalty Assessment Type filter on the Penalty page causes the same problem with the Age of Penalty Balance and Size of Penalty Balance reports. The workaround until these issues are fixed is not to use the page level filter but use the individual filters available in the reports instead. (Bug Numbers 14730660, 14596204)
- The metrics 'Penalty Balance' and '# of Taxpayers with Penalty Balance' are incorrect. (Bug Number 14597155)
- The report Type of Assessment Waived by Waiver Reason on the Waivers page does not include data for all types of assessments. (Bug Number 14736548)
- The reports Waiver Trend, Total Waivers Created in Selected Period, Waivers by Tax Type, Waivers by Waiver Reason, Waivers by Waiver Size, Waiver Reasons & Size, Type of Assessment Waived by Waiver Reason, and Waivers of Taxpayer Types by Waiver Reason do not show correct data when the Waiver Size filter is used. (Bug Number 14748270)
- The metric '# of Taxpayers with Write Offs' in the following reports is incorrect: Total Write Offs Created in Selected Period, Amount Written Off by Tax Type, Write Offs by Taxpayer Type, Size of Write Offs. Similarly, the metric '# of Taxpayers with Waivers' is incorrect in the following reports: Total Waivers Created in Selected Period, Waivers by Waiver Reason, Waivers by Waiver Size, and Waivers of Taxpayer Types by Waiver Reason. (Bug Number 14736164)

Collections

- In the Exec Summary page of the Executive Summary dashboard, when selecting a filter value that is outside of the range of years being displayed, an error is displayed for the detail graph reports. For example, if data for the years 2010-2012 is shown and a filter value of 2007 is selected on the page prompt, the graph reports on the right hand side will display an error. A workaround is to refresh the page, and then select the filter value from the drop down and press Apply. (Bug Number 14622494)

Chapter 3

Oracle Tax Analytics Licensing and Packaging Reference

Oracle Tax Analytics licensing and packaging information.

Licensable Products

Oracle Tax Analytics consists of three separately licensable products, namely:

- [Oracle Tax Registration Analytics](#)
- [Oracle Tax Accounting Analytics](#)
- [Oracle Tax Collections Analytics](#)

Each licensable product includes the pre-built Oracle Tax Data Model.

Subject Areas and Dashboards

Oracle Tax Registration Analytics

Registration Dashboard

Path to dashboard: /shared/Registration/_portal/Registration/<dashboard page name>

Subject Area	Dashboard Page Name
Registration	KPI
Registration	Summary Map
Registration	Individuals
Registration	Individual Trends
Registration	Business Distribution

Subject Area	Dashboard Page Name
Registration	Business Trends
Party	Business Migrations
Registration, Party	Non-Profits
Party	High Net Worth Individuals
Party	Closed Business Inventory
Party	Migrated Business Inventory

Oracle Tax Accounting Analytics

Taxpayer Accounting Dashboard

Path to dashboard: /shared/Accounting/_portal/Taxpayer Accounting/<dashboard page name>

Subject Area	Dashboard Page Name
Taxpayer Accounting	KPIs
Taxpayer Accounting	Summary
Taxpayer Accounting	Financial Trends
Taxpayer Accounting	Tax
Taxpayer Accounting	Penalty
Taxpayer Accounting	Interest
Taxpayer Accounting	Waivers
Taxpayer Accounting	Write Offs

Oracle Tax Collections Analytics

Executive Summary

Path to dashboard: /shared/Outstanding Debts/_portal/Executive Summary/<dashboard page name>

Subject Area	Dashboard Page Name
Outstanding Debts	Exec Summary
Outstanding Debts	Collectable Debts
Outstanding Debts	Disputes
Outstanding Debts	Bankruptcy
Outstanding Debts	Trends

Outstanding Debt of Businesses

Path to dashboard: /shared/Outstanding Debts/_portal/Outstanding Debt of Businesses/<dashboard page name>

Subject Area	Dashboard Page Name
Outstanding Debts	KPIs
Outstanding Debts	Collectable Debt
Outstanding Debts	Disputes
Outstanding Debts	Bankruptcy

Outstanding Debt of Individuals

Path to dashboard: /shared/Outstanding Debts/_portal/Outstanding Debt of Individuals/<dashboard page name>

Subject Area	Dashboard Page Name
Outstanding Debts	KPIs
Outstanding Debts	Collectable Debt
Outstanding Debts	Disputes
Outstanding Debts	Bankruptcy

Performance Monitoring Scorecard

Path to dashboard: /shared/Performance Monitoring/_portal/Performance Monitoring Scorecard/<dashboard page name>

Subject Area	Dashboard Page Name
Outstanding Debts	Strategy Tree
Outstanding Debts	Details