

**Oracle® Insurance Rules
Palette**

Release Notes

**Oracle Insurance Policy
Administration**

Version 9.7.0.0

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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 9.7.0.0, 2013.

Customer Support

For customer support, please visit My Oracle Support: <https://support.oracle.com>.

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Enhancements in the Oracle Insurance Rules Palette

This section describes enhancements that were made to the Oracle Insurance Rules Palette GA release 9.7.0.0.

Fields

Two new field types are now available: Title and Label. Title fields serve as high-level headings for groups of other fields, while Label fields server as lower-level headings.

Math

A new math variable type, MultiField, is now available for use in transaction math. During the activity verification process, this math variable retrieves the value of each multifield used in the transaction.

New Business and Underwriting

New User Roles

The new functionality provides support for the new business and underwriting processes that are essential parts of the policy life cycle. New categories of people involved in the pre-issue processing of policies, such as underwriters and case managers, may increase a number of users accessing the OIPA system and require additional system resources.

Applications and Policies

In the template configuration that comes with the OIPA product there are two distinct business entities: Applications for insurance and Insurance Policies. Policy data submitted for underwriting processing is stored as an application. When an underwriting process results in the issue of a policy, relevant policy data is carried over into a new insurance policy. This arrangement essentially doubles a number of policies that may exist in the OIPA database. While older applications may eventually be archived, this may still require additional database resources.

NBU-Related User Interface and Database Table Tune-Up

The OIPA NBU features are available to the user through a number of configurable application pages that access business data stored in the NBU-related database tables. Examples of the NBU-related business data are case, impairment, requirement and requirement result information. While the database tables that are accessed through the NBU screens have out-of-the-box indexes, additional performance tuning may be beneficial after the NBU page configuration has been completed. The best possible performance can only be achieved if the actual structure of the configured data model is taken into consideration. This is a typical best practice recommended for all OIPA configurable screens.

Requirement Processing

OIPA requirement processing is a powerful feature that allows modeling of complex business processes that may take days or even months from beginning to completion. Examples of such processes include ordering and receiving reports from external vendors about an insured, obtaining a missing application form, sending correspondence to an agent or a client, etc. The requirement processing may be triggered by a user through the UI via activity processing, or by the background requirement processor. The background requirement processor keeps looking for existing requirements that are scheduled for immediate processing or have become overdue and require immediate attention. Once such requirements are found, corresponding tasks are created to process them, which are then distributed through the Coherence execution grid to available OIPA instances. Planning of the processing strategy that may involve shared or dedicated OIPA instances and capacity of available system resources should be based on the anticipated volume of requirements the system needs to process this work.

Rates

The new CreateAdditionalRates business rule allows a transaction to generate a set of new rates within an existing rate table that is associated to a rate group.

Security

The ability to override an error is now controlled through a combination of attached rule and security role configuration. In the configuration for the ValidateExpressions and PostAssignmentValidateExpressions attached rules a configurator can specify whether a given error should be overridable in general, and in security role configuration a configurator can designate whether specific security roles should be able to override these errors.

Deprecated Items

The ability to override an error by security group is no longer controlled by using a SecurityGroup name for the OVERRIDABLE attribute of the <Expressions> element in the ValidateExpressions and PostAssignmentValidateExpressions attached rules. This attribute may now only be given the values “Yes” or “No.”

Technology Specific Enhancements

Java was upgraded to JDK 1.6 Update 41.