

**Oracle® Insurance Rules  
Palette**

**Release Notes**

**Oracle Insurance Policy  
Administration**

Version 10.0.0.0

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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 10.0.0.0, 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 10.0.0.0.

### Addresses

- The AddressScreen business rule now supports configuration for foreign addresses.

### Agreements

- In addition to the AgreementScreen and AgreementRoleScreen business rules, the following configurable entities supporting agreements have been added to the Rules Palette:
  - AgreementDefinition—configures a single agreement definition.
  - AgreementRelationship—defines the parent/child relationships between all agreement types under an agreement category.
- New agreements can be added in the Rules Palette via the new Agreement node.

### Business Rules

- The RequirementScreen business rule has been renamed to ActivityRequirementScreen.
- The ClientScreen business rule now supports the ability to configure the LegalResidenceCountryCode field so that only the customer's defined country values will display.

- A new GroupCustomerScreen business rule has been added to allow for the configuration of the Group Customer screen. This screen supports the creation of group customers, as well as to support the viewing and editing of existing group customers.
- A new GroupCustomerSearchScreen business rule has been added to support configuration of the Group Customer Search screen. This screen allows the user to search for group customer records.
- A new GroupCustomerRelationshipScreen business rule has been added to support configuration of the Group Customer Relationship screen. This screen allows the user to view, edit or create relationships between a group customer and another group customer or an individual client.
- The new AgreementScreen business rule configures the Agreement Screen, which allows for the creation of new agreements, as well as for the viewing of agreement details.
- The new AgreementRoleScreen business rule configures the Agreement Role screen, which allows the user to:
  - View existing agreement roles
  - Add a new client of a specific role type
  - Find and add clients as agreement roles
  - Edit the details of an agreement role
  - Delete an agreement role
- A new AlternateNameScreen business rule was added, which allows for the configuration of the Alternate Name screen. This screen allows the user to view the alternate names that exist for a particular group customer.
- The following configurable entities have been added to support the new Data Intake functionality, which is a new feature set implemented to support the receiving and processing of group customer-supplied data for importing into OIPA.
  - FileDefinition—configures the dynamic fields for a Data Intake File, as well as the File's processing instructions
  - RecordDefinition—configures the dynamic fields for a Data Intake Record, and to configure the Record's processing instructions
  - RecordSchema—defines all of the fields contained in an incoming Record, and is configured to define all of the field names that can be received in a record.
- The new PlanSegmentNameClassScreen business rule configures the Class-Sub-Plans screen. This screen allows the user to view all of the Class-Sub-Plan associations for a selected class. Class-Sub-Plan associations can also be deleted from this screen.
- The new PlanSegmentNameClassParticipantsScreen business rule configures the data that displays on the Class-Sub-Plan Participants tab of the Class-Sub-Plan screen. This tab displays data related to participants enrolled in a particular Sub-Plan.
- The new ClassScreen business rule configures the Class screen, which allows the user to create and edit classes. This business rule includes configuration to control the fields that display on the screen, depending on the class' type.
- The new ClassGroupScreen business rule configures the Class Group screen, which allows the user to create and edit class groups. This business rule includes configuration to control the fields that display on the screen, depending on the class group's type.

- The new CreateClient business rule allows for the creation of new clients via activity processing.

## Clients

- The ClientSearchScreen business rule now allows for the results of a search to be sorted by a configurable method.

## New Business Underwriting

- Requirements can now be configured to be color-coded according to their status.
- The new UnmatchedResultSearchScreen business rule is now available, which allows for the configuration of the Unmatched Requirement Result Search screen. This screen allows the user to search for requirement results not matched to a requirement record and subsequently match these results to requirements.

## Programs

- ProgramDefinition configuration now supports the ability to define an action to change the program's value on a specific date by initiating an activity.

## Release Management

- Release packages that have been deployed to a target environment can now be "rolled back," i.e., un-deployed from the target environment.
- Rules Palette environments can now be given an "IVS Sequence" value in the Web Application Utility. This value assigns the environment a place in the release management sequence. When release packages are being deployed to multiple target environments, they must be deployed in the order specified by each environment's IVS Sequence value.
- Release packages are now given a deployment order. Each package must be deployed in the proper sequence or an error will occur.

## Security

- Rules Palette security is now environment-specific, rather than being shard across all environments and tracks in the same IVS database.

## Transactions

- The existing Client-Financial transaction type has been renamed, and a new transaction type also called Client-Financial has been added to support undo/redo activities.
- Transactions can now be overridden at the product level.

## **Deprecated Items**

The CopyTos business rule is no longer supported.

## **Technology-Specific Enhancements**

The Rules Palette was upgraded to work with JDK versions 1.7.x.