

Oracle Public Sector Revenue Management

Release Notes

Version 2.4.0.2.0

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Preface

These release notes provide an overview of the enhancements and known issues in Oracle Public Sector Revenue Management version 2.4.0.2.0.

Audience

Oracle Public Sector Revenue Management Release Notes is intended for anyone installing or using Oracle Public Sector Revenue Management version 2.4.0.2.0.

Related Documents

For more information, refer to these Oracle documents:

Installation Guides and Release Notes

- *Oracle Public Sector Revenue Management V2.4.0.2.0 Release Notes*
- *Oracle Public Sector Revenue Management V2.4.0.2.0 Quick Install Guide*
- *Oracle Public Sector Revenue Management V2.4.0.2.0 Installation Guide*
- *Oracle Public Sector Revenue Management V2.4.0.2.0 Database Administrator's Guide*
- *Oracle Public Sector Revenue Management V2.4.0.2.0 Optional Product Installation Guide*

Administration and Business Process Guides

- *Oracle Public Sector Revenue Management V2.4.0.2.0 Administration Guide*
- *Oracle Public Sector Revenue Management V2.4.0.2.0 Business Process Guide*
- *Oracle Utilities Application Framework V4.2.0.3.0 Administration Guide*
- *Oracle Utilities Application Framework V4.2.0.3.0 Business Process Guide*

Supplemental Documents

- *Oracle Public Sector Revenue Management V2.4.0.2.0 Batch Server Administration Guide*
- *Oracle Public Sector Revenue Management V2.4.0.2.0 Server Administration Guide*
- *Oracle Public Sector Revenue Management V2.4.0.2.0 Security Guide*

Conventions

The following text conventions are used in this document:

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.
<code>monospace</code>	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Release Notes

These release notes describe enhancements and known issues for Oracle Public Sector Revenue Management version 2.4.0.2.0. It contains the following sections:

- **About This Release**
- **Known Issues**
- **Demo Data Information**

About This Release

This section describes new and enhanced features in release 2.4.0.2.0 for Oracle Public Sector Revenue Management (Oracle PSRM).

General System Enhancements

The following items describe general system changes to the product.

Integration with Oracle Fusion Middleware MapViewer

The integration with Oracle Fusion Middleware MapViewer (MapViewer) provides the ability to incorporate interactive geographic maps in the web browser-based user interface.

In this release multiple entities were enhanced with geographical maps that display sites associated with the entity. Maps were added to the maintenance portals of Address, Asset, Person and Tax Role,

The map is displayed if the following conditions are met:

- The latitude/longitude of one or more sites associated with the entity can be derived
- The map zone is defined on the maintenance portal
- The business object has a corresponding geo map information derivation script

The integration is extendable. Although in this release the product provides only basic maps for several entities, the implementation may use the integration infrastructure to enable maps on additional maintenance portals, enrich the map itself with additional content and implement other functionality supported by MapViewer's JavaScript API.

New Method of Integration with OPA

In this release the product introduces a new method of integration with Oracle Policy Automation. The data model for the OPA rulebase may be generated based on the definitions of the object in PSRM allowing the object in PSRM and the OPA rulebase to share that data model. The webservice-based communication between PSRM and the OPA determinations server is fully handled by the product.

- The OPA rulebase can be used to validate and process an entire tax or registration form. The rulebase data model is generated according to the form type definitions and the product provides Form Rule BO C1-OpaValidation and its Apply Rule algorithm to support the integration. The data model and the integration mechanism is similar to the OPA form validation engine in PSRMSS, therefore the same OPA rulebases can be used to validate form of the same type across the enterprise. See **Form Rule Enhancements** for additional details.
- The OPA rulebase can be used to validate and process the contents of a data area. The rulebase data model is generated based on the data area's schema. The product provides a business service that receives the data area XML as an input, performs the interaction with OPA and returns the validated data to the caller.

Self Service Enhancements

The following sections highlight enhancements made to the integration with PSRMSS.

Support for Service Request History and Request Escalation

In this release the integration supports a Service Request History query. The query returns the list of service tasks associated with generic taxpayer requests, refund status check requests and also account enrollment requests.

Support for an Automatic Pre-population of the Online Form

The online form processing was enhanced to provide automatic pre-population of the basic taxpayer information. The feature is implemented using new form rule event. See **Form Rule Enhancements** for more details.

Ability to View the Historic Forms Online

In this release the product introduces the ability to view historic forms online via a new online form processing action of 'READ'. The form is retrieved by either a document locator or a confirmation number associated with the original online form submission.

Forms Enhancements

The following items describe enhancements made to form functionality.

Form Processing Enhancements

The following items describe form processing enhancements.

New Option for Scheduling Tax Form Monitoring

The base parent Tax Form BO has the base monitor batch process configured on the pending state, to ensure that forms are not automatically transitioned as soon as they are created. Under the standard rules for batch transition, the only batch code that is allowed to transition the record is the one linked to the state.

For implementations that have child BOs, there may be a need to monitor one subset of the records on a different schedule than another or to ensure an order of processing of one set prior to another.

In this release the Tax Form Deferred Monitor process (C1-TXFRM) has been enhanced to allow the user to define a batch code value to be used in the BO status selection criteria, overriding the submitted batch code value. The override batch code is a new parameter to the process.

The following is an example of how the approach may be used to resolve a timing issue.

- Two types of forms for the taxpayer may be submitted in the same batch. One form type may need to check if the other one exists and apply business rules accordingly. Due to multi-threading, there is no control over which form is processed first and it may not be possible for one form type to 'see' the other.
- The implementation may now create two new batch controls to separate the form types. Batch Control 1 would include parameters to restrict the selection to form type A and Batch Control 2 would have no form type criteria, thus picking up all other forms. Batch Control 1 would be scheduled to run ahead of Batch Control 2.
- Both batch controls would set the batch code override parameter to the base Tax Form Deferred Monitor code so that both batch runs would include tax forms in any state marked with the base deferred monitor.

New Option for Limiting the Number of Tax Forms Processed

For implementations that run the tax form monitor process multiple times during the day, there may be a need to limit the number of forms processed in the run for performance reasons.

In this release the Tax Form Deferred Monitor process (C1-TXFRM) has been enhanced to allow the user to define a maximum number of records to be selected for processing per thread. If the monitor process is configured to run in multiple threads, the maximum number of forms selected within a batch run will be limited to a value equal to number of threads multiplied by the parameter value.

Use of this parameter does not guarantee a throughput equal to the maximum total. This is because the Framework selects the records to be processed per thread by calculating a low and high ID range and incorporating that into the selection criteria. The IDs of the forms ready for processing may not be perfectly even across threads, so the number selected per thread may not always reach the maximum. The following is an example of the possible results:

- There are 30,000 forms ready for processing and the implementation wants to restrict this to a maximum of 15,000.
- The process is configured to run in three threads so the maximum records parameter is set to 5000.
- The IDS are spread so that there are 13,000 eligible forms in the ID ranges for threads one and two but only 4000 in the range for thread three
- Since each thread is restricted to a maximum of 5000, the total number of forms processed will be $5000 + 5000 + 4000 = 14,000$

Note that the random key generator is designed to ensure that records are nearly evenly spread across the ID range and so the skewing effect in production should be negligible.

Form Rule Enhancements

The following items describe form rule enhancements

New Rule to Validate Forms Using an OPA Rule

In this release, a new form rule has been provided to validate form data by invoking an OPA rule. It provides the ability to pass the entire form line data to OPA and to process any exceptions reported by the rule. It also allows the OPA decision report to be captured as an attachment to the form.

This rule assumes that the OPA rulebase was created using the Generate OPA Rulebase action on the form type

Note: Refer to the description for the business object C1-OpaValidation and its apply rule algorithm C1-OPAVLAPRL for more information on the new form rule. Refer to the section on the new method of OPA Integration above for more information on support for generating rulebases from PSRM.

New Rule to Invoke System Services

In this release, a new form rule is introduced that supports invoking a system service with selected form data. The rule provides the ability to invoke a business service, service script or business object. It allows your implementation to map form lines to the inputs and outputs defined by the service.

Note: Refer to the description for the business object C1-InvokeSystemService and its apply rule algorithm C1-ISS-APRL for more information on the new form rule.

Validation for Conditionally Required Sections and Lines Introduced

In this release, a new form rule is provided that checks whether a section or line in a form is required or not allowed based on certain conditions. This rule is primarily intended to support situations in which the existence of a section or line depends upon the values in or existence of other related sections and lines in the form. For instance, if a form line has a value for a deduction, that deduction may need to be supported by an itemized schedule included in the form.

To support this rule, form line definition has been enhanced to allow implementations to specify whether a group line is required or optional, whether it allows limited or unlimited occurrences and the maximum occurrences allowed.

The rule is configured to reference a specific section or group line and defines whether this section/group is required or not allowed based on certain conditions. The rule also provides the ability to define variables and expressions that define those conditions.

Refer to the description for the business object C1-CheckCondReqdSectionGroup and its apply rule algorithm C1-CRQ-APRL for more information.

Support for Form Line Validation Using Pattern Matching Introduced

In this release, the form line definition has been enhanced to allow implementations to specify a validation pattern in the form of a regular expression for character based form lines. This feature is intended to support validation of form lines that contain information that should conform to a known format, such as tax authority specific account numbers or email addresses.

The regular expression to be used as the validation pattern is defined using an extendable lookup value. The base extendable lookup BO C1-RegularExpressionLookup is provided to capture these values. The Form Line Configuration Validation rule has been enhanced to validate the line contents against the regular expression defined in the validation pattern lookup value, if configured.

Note: Refer to the description for the business object C1-ChkReqSectionsLines and its apply rule algorithm C1-CHKREQSLN for more information.

New Rules to Copy Tax and Registration Forms

In this release, new form rules to copy lines from previously posted tax and registrations forms have been introduced. These rules are meant to be plugged in to the new 'Copy Previous Form' rule event which is designed to be invoked via external services, such as web self service and not as part of the form lifecycle.

Note: Refer to the descriptions for the business objects C1-CopyPreviousRegForm and C1-CopyPreviousTaxForm and their apply rule algorithms C1-CPYRGFORM and C1-CPYTXFORM for more information.

New Rules to Pre-populate Form Demographic Information

In this release, a new form rule to retrieve name and address information and transfer the details to the form being processed has been introduced. This rule is meant to be plugged in to the new 'Pre-Populate Form' rule event which is designed to be invoked via external services, such as web self service and not as part of the form lifecycle.

Note: Refer to the description for the business object C1-PrepopulateDemographicInfo and its apply rule algorithm C1-PRPFORM for more information.

Form Line Table Change

For technical reasons, the definition of the HELP_TEXT field on the form line record has been changed to 'nullable'. This means that if this field is left blank on the form line definition it will now be saved as a null value, not blanks. Implementations should review their custom code to verify that it is not relying on a blank value in this field.

Taxpayer Accounting Enhancements

This section highlights enhancements to taxpayer accounting functionality.

Additional Obligation Type - Payment Freeze Algorithm

In this release a new Payment Freeze algorithm has been provided:

- Adjust Effective Date For Payments Within Grace Period (C1-PAYADJEFD). This algorithm will adjust the effective date of a frozen payment to reflect that it was received within the

payment grace period for the obligation, if applicable. It may be used on filing based obligation types as an alternative to requiring any logic that creates or transfers a payment to adjust the date. Refer to the algorithm description for more information.

Overpayment Process Enhancements

This section highlights enhancements to overpayment processing functionality.

Miscellaneous Enhancements to Overpayment Algorithms

In this release, the processing that creates the refund has been enhanced to allow implementations to override the base logic for adjusting the amounts of the direct deposit requests if the refund amount has changed. That logic was previously incorporated into the base algorithm responsible for creating the direct deposits. It is now performed in a separate algorithm that is executed prior to the refund creation, allowing it to be overridden by a custom algorithm.

Update Direct Deposits (C1-OP-UPDDD)

This is a new algorithm type that checks the total of the direct deposit requests against the current obligation balance and adjusts them accordingly. The algorithm attempts to allocate the requested amount to each bank account in the order listed on the overpayment process until the available balance is fully disbursed. Refer to the algorithm type description for more details.

Note: The logic in the new algorithm is the same as the logic previously performed by the base Create Refund FT algorithm prior to creating the direct deposit bank events or negative payments.

Create Refund FT (C1-OP-CREREF)

This algorithm type has been amended to remove logic to adjust the amount of a direct deposit in cases where the obligation credit balance has changed from the original value.

Note: The new algorithm C1-OP-UPDDD is configured to run prior to C1-OP-CREREF on the standard overpayment process BO, which results in no change to the previous base functionality for adjusting deposit amounts.

Asset Valuation Enhancements

This section highlights enhancements to asset valuation functionality.

Ability to Cancel an Active Valuation

In this release the lifecycle for the base valuation business object Valuation (C1-Valuation) has been enhanced to allow an active valuation to be canceled provide it has not been used on a bill.

- The BO now allows transition to the canceled status from the active status.
- The existing validation algorithm will issue an error if the system attempts to change the valuation status and the valuation record is linked to a bill that is 'in effect'.

System Data Details

Refer to the database upgrade guide for information related to system data, including:

- New system data.
- Notable changes to existing system data and descriptions of their potential impact.
- System data no longer supported.
- Information about planned system data deprecation in a future release.

Note to security administrators: The list of new application services or additional access modes on existing application services are listed in the database upgrade guide.

Application Services Moved From ALL_SERVICES

The base user group ALL_SERVICES normally includes all the base application services and all their access modes so that new implementations can easily review base functionality in testing environments. It is not expected for implementations to use the ALL_SERVICES user group in production. Implementations should be defining appropriate user groups for their users based on appropriate business responsibilities.

To avoid confusion for future implementations, the following application services for functionality that is no longer recommended have been moved from the ALL_SERVICES user group to LEGACY_SERVICES. This should not impact existing implementation because the user groups defined are not affected. However, in case there are still testing regions still relying on the ALL_SERVICES configuration, these application services are linked to ALL_SERVICES as CM-owned.

Service	Description
CILQCASP	Case Management
CILTCATP	Case Type
CILYASTP	Account Staging
AFDZONE	Account Financial History Detail
AFHZONE	Account Financial History Zone
C1LABALP	Control Central - Credit Allocation (Acct) Zone
C1LTBALP	Control Central - Credit Allocation (Taxpayer) Zone
CILCAASP	Active Account Summary
CILCCCIP	Control Central
CILCCIZP	Taxpayer Information Zone
CILCFIZP	Financial Information Zone
CILLCAZP	Compliance Information Zone
CTXTZONE	Context Zone
PERTREE	Person Tree
C1-BUSREGFORMBOAS	Business Registration Form BO
C1-BUSREGFRMTYBO	Business Registration Form Type BO
C1-GENFORMBATCHHDR	Form Batch Header BO
C1-INDFRMTYPEBOAS	Individual Income Tax Form Type BO
C1-INDXFRMBOAS	Individual Income EZ Tax Form BO
C1-SUTXFRMBOAS	Sales and Use Short Tax Form BO
C1-SUTXFRMTYBOAS	Sales and Use Short Tax Form Type BO
C1-TAXFORMBOAS	Tax Form BO

Functionality Deprecation

Classic Billing References

The following user interface components are related to the classic billing module. As of this release they are only visible for implementations that have not turned off the classic billing product module:

- Bill Messages tab on the Rate Schedule page.
- Various elements on the Obligation page:
 - Total Amount to Bill field on the Main tab
 - Maximum Bill Threshold on the Main tab
 - Rates tab (in its entirety)
 - Bill Messages collection on the Misc tab

In addition, the "Chars and Rec. Charges" tab has been renamed to just "Chars". The recurring charge collection is moved to a new tab called "Rec. Charges". This tab is only visible for implementations that have not turned off the classic billing product module.

Planned Deprecation

Config Lab

Config Lab has been superseded by the Configuration Migration Assistant functionality that has been available in the product since PSRM version 2.4.0.1.0. It will be removed from the product in an upcoming release.

Planned System Data Deprecation

The following configuration data is not used in any base processing and will be removed in a future release.

Type of Object	Object ID	Comments
Business Service (bug 13437737)	C1-NotPendOrErrFormTypeStatus	This is currently used by base form line and section business objects. They will be updated to no longer use this business service. Any custom objects that use this business service should change to instead use the BS F1-RetrieveBOStatusOption, which returns status option values.
Zone (bug 13437737)	C1-FRMTYPEST	Used by the business service C1-NotPendOrErrFormTypeStatus.

Obligation Table

The following columns currently defined in the obligation table (CI_SA) will be removed in a future release. Note that code referring to these columns has been removed in this release. However, the columns were kept in the table to allow for a warning of future removal.

Field Name	Field Description
ALLOW_EST_SW	Allow Estimates?
ASSET_ID	Asset ID
CUST_READ_FLG	Customer Read
ENRL_ID	Order ID
IB_BASE_TM_DAY_FLG	Start Day Option
IB_SA_CUTOFF_TM	IB SA Cutoff Time
PROP_DCL_RSN_CD	Proposal Decline Reason
PROP_SA_ID	Proposal SA ID
PROP_SA_STAT_FLG	Proposal SA Status
SA_REL_ID	SA Relationship ID
START_OPT_CD	Start Option

Important: Implementations must review their obligation business objects to verify that these fields have not been included in the schema. If they have been included, they should be removed to anticipate the future upgrade.

Account Start/Stop Tables

The following tables currently defined in the account maintenance object will be removed in a future release.

- CI_SS_ADDR_OVRD - Start/Stop Mail Addr Override
- CI_SS_PHONE_OVRD - Start/Stop Telephone Override

Note that the base product was not using any functionality related to these tables.

Important: Implementations must review their account business objects to verify that the fields for these collections have not been included in the schema. If they have been included they should be removed to anticipate the future upgrade.

Framework Planned Deprecation

The following functionality is planned to be deprecated in a future product version release:

- XAI Inbound Services - This has already been superseded by the Inbound Web Services functionality that has been available in the product since PSRM version 2.4.0.1.0.

For more information on migrating from XAI to IWS, refer to *Migrating from XAI to IWS Oracle Utilities Application Framework* (Doc ID 1644914.1) on My Oracle Support.

Known Issues

This section describes known issues in Oracle Public Sector Revenue Management version 2.4.0.2.0. Patches for these issues will be released at a later date.

Some issues are isolated to a particular browser. They are listed in a special section accordingly. Issues that exist regardless of the browser are grouped by functional area.

Browser-Specific Issues

In the Chrome browser, removing an overpayment from a refund control results in the error message "Overpayment Process ID is missing." (Bug 21277076)

In the Arabic language, various incorrect behavior occurs on the Bill Type UI in IE and Firefox, including subsection headers being truncated, record action buttons not aligned to the right and not ordered from right to left, and the vertical scrollbar being on the right instead of on the left. (Bug 21497609)

Registration

In the Arabic language, the labels for address fields in the Person - Correspondence Info page are not shown. (Bug 21431313)

Forms

Opening an OPA decision report from the Tax Form Log brings up a blank window instead of showing the OPA decision report. (Bug 20704548)

Some form lines that are not allowed to be changed based on the status of the form are editable. As a result, the user is able to change them but gets an error when saving. (Bug 21505774).

Form Rules

Some form rules may not be ignoring form lines that have been marked as logically deleted. (Bug 20544107)

In the Rule Details section of the Conditionally Require Sections and Groups form rule (C1-CheckCondRequiredSectionGroup), required sections are excluded from the Section Name dropdown, preventing the user from setting groups under those sections from being conditionally-required. (Bug 21543164).

In the Rule Variables section of the Conditionally Require Sections and Groups form rule (C1-CheckCondRequiredSectionGroup), the Form Line dropdown may not show the proper list based on the Rule Variable Type. While the list of applicable values may be different for each rule variable type, the list is retrieved only once—on the first form line dropdown opened for the same form section. It is then reused for all other variables using the same form section, regardless of rule variable type. (Bug 21543180)

Payments

The Payment Event Upload - Process Payments (C1-PEPL2) batch process does not process audit payment event upload staging records with multiple payments. (Bug Number 19456729)

OPA

Generating the data area for a web service adapter for an OPA 10.4.4.21 rulebase (the supported OPA version for this release) results in the error, "Error reading Oracle Policy Automation rulebase zip". The workaround is to simply remove the Byte Order Mark (BOM) character from the rulebase XML. One way to do this is to open the file in an editor that allows specifying file encoding (e.g., NotePad ++), change the encoding to one without BOM, then save the file. (Bug 19033157)

Audit

Updates to BOs through BO Post Processing algorithms are not captured in audits. (Bug 12595973)

General Development

Displaying an object based on a BO whose data area was extended and where the extension has a start and an end section for UI hints, results in an "Error 500 -- Internal Server Error". Note that this only affects CM objects, as the base product does not have data area extensions. (Bug 19366007)

Demo Data Information

The application delivers a demo database based on the application versions provided with the release, including Oracle Utilities Application Framework. Demo data provides sample configuration and data for key application features. Please refer to the *Database Administrator's Guide* for more information about installing the demo database, or contact Oracle Support.