

# **Oracle® Revenue Management and Billing Analytics**

Version 2.2.1.0.0

## **Release Notes**

Revision 1.0

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Oracle Revenue Management and Billing Analytics Release Notes

E53534-04

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# Preface

## About This Document

This document lists the new features and enhancements included in the current release of Oracle Revenue Management and Billing Analytics. The document also includes details of the platforms supported by this version of ORMBA. The known issues or bugs, if any that are part of this release are also mentioned in this document.

## Intended Audience

This document is intended for the following audience:

- End-Users
- System Administrators
- Consulting Team
- Implementation Team

## Organization of the Document

The information in this document is organized into the following sections:

Section No.	Section Name	Description
Section 1	What's New in This Release?	New features introduced in this release
Section 2	Supported Platforms	Platforms on which you need to apply the release
Section 3	Product Documentation	Documents to refer while applying this release
Section 4	Media Pack Download	Contents of the media pack and instructions to download
Section 5	Known Issues	Known issues or bugs, if any
Section 6	Technical Support	Channels for technical assistance

## Related Documents

You can refer to the following documents for more information:

Document	Description
<i>Oracle Revenue Management and Billing Analytics Installation Guide</i>	Details the pre-requisites, supported platforms, hardware and software requirements for installing the Oracle Revenue Management and Billing Analytics, along with the detailed installation process.
<i>Oracle Revenue Management and Billing Analytics Admin Guide</i>	Describes the common administrative tasks to be carried out as part of maintaining the ORMBA installation.

Document	Description
<i>Oracle Revenue Management and Billing Analytics Security Guide</i>	Describes how to configure security for Oracle Revenue Management and Billing Extractors and Schema and Oracle Revenue Management and Billing Analytics.

## Change Log

Revision	Last Update	Updated Section	Comments
1.0	October 2016	All	New document for release version 2.2.1.0.0

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# 1. What's New in Release v2.2.1.0.0?

With this release, we have introduced several new features and they are grouped under logical heads given below:

- Extractors & Schema
- Dashboards & Reports
- Administration UI
- Simulation
- Other Updates

## 1.1 Extractors & Schema

This section contains the feature introduced in the Extractors and Schema layer of ORMB Analytics.

### 1.1.1 New Dimensions

With this release, a new dimension BD\_TXN\_LINE is available for Transaction Line attributes. This dimension allows you to slice and dice priced data based on transaction attributes, which in turn helps you to analyze the impact of creating new price assignments or merge existing price assignments. This dimension has 17 attributes, including Transaction Source and Record Type.

The transaction attributes based on which slice and dice can be done are taken from UDF\_CHAR\_1\_DESC to UDF\_CHAR\_15\_DESC fields of ORMB record CI\_TXN\_REC\_TYPE\_L

### 1.1.2 Changes to Existing Dimensions

- BD\_CUST: Additional columns to map customer identifiers and additional attributes

Field	Description
ID_TYPE_X	Up to 5 customer identifier types Eg: SSN, EID
ID_VALUE_X	Customer identifier values
ID_TYPE	Primary identifier type
ID_VAL	Primary identifier value
DT_OF_BIRTH	Date of Birth
SINCE_DT	Customer Since Date
CRE_DTTM	Created Date/Time
LAST_UPD_DTTM	Last Updated Date/Time

<b>FIXED_PRICE_YN</b>	Fixed Price Contract or not (Y/N)
<b>ORMBA_DEAL_ID</b>	Deal ID in ORMBA
<b>CIS_DIVISION</b>	Division
<b>CIS_DIVISION_DESCR</b>	Division description

- **BD\_ACCT**: Additional columns to map account numbers and other additional details

Field	Description
<b>ACCT_NBR_TYPE_X</b>	Up to 5 account number types
<b>ACCT_NBR_X</b>	Account number values
<b>ACCT_NBR</b>	Account Number
<b>ACCT_NBR_TYPE</b>	Account Number Type
<b>CRE_DTTM</b>	Created Date Time
<b>PRD_CD</b>	Product ID
<b>PRD_CD_DESCR</b>	Product Description
<b>LAST_UPD_DTTM</b>	Last Updated Date/Time
<b>ORMBA_DEAL_ID</b>	Deal ID in ORMBA

- **BD\_PRODUCT**: Additional characteristic fields

Field	Description
<b>PRD_MGR</b>	Product Manager
<b>STD_PRICE</b>	Standard Price in Corporate currency
<b>PROD_UNIT_COST</b>	Unit Cost in Corporate currency
<b>PROD_NEGTY</b>	Negotiability (%)



- **BD\_DIVISION:** Additional characteristic fields

Field	Description
<b>DEF_PRICELIST</b>	Default Pricelist for a Division
<b>DIV_TYPE</b>	Division Type [whether it is a Country, Region, or Global Division]
<b>PAR_DIV</b>	Parent Division, used to build division hierarchy

### 1.1.3 Changes to Existing Facts

The following facts are changed in this release:

- **BF\_PRICE:**
  - Facilitate daily rating
  - Populate unit cost and standard price (PROD\_COST\_CHAR\_CD and STD\_PRICE\_CH)
  - Facility to map 'pricing' related characteristics, which will be populated in BD\_PRICE\_UDD1 and linked to BF\_PRICE through foreign key
- **BF\_ADJUSTMENT:**
  - Facility to map 'adjustment' related characteristics, which will be populated in BD\_ADJ\_UDD1 and linked to BF\_ADJUSTMENT through foreign key

### 1.1.4 Others

The daily Materialized Views refresh jobs are now disabled by default and if needed, you need to enable them manually through Job Configuration page of ORMBA Admin UI. Only monthly Materialized Views refresh jobs are enabled by default.

## 1.2 Dashboards & Reports

This section includes the features introduced in ORMBA Dashboards and Reports

### 1.2.1 Deal Management

With this release, ORMBA introduces a new module for deal management that manages the entire lifecycle of a deal, starting with deal creation in ORMBA and ending with prospect and pricelist creation in ORMB.

- Create deals for prospects as well as existing customers
- Handle global deals spanning multiple divisions
- Division-specific deals
- Show original and projected values for Revenue, Cost, Discount and Profitability
- Projections are available at each level of customer hierarchy

- Show impact in revenue at each level of customer hierarchy
- Multi-level approval workflow for deals
- Dynamic workflows that varies depending on impact, discount and profit values
- Allow manual intervention by Supervisor user
- Apply back of the deal details to source system, resulting in customer and pricelist creation
- View all deals created for a customer
- Compare different deals
- Versioning of deals
- Set expiry of deals
- Quote printing

To know more the deal management module, see the ORMBA Dashboard User Guide.

## 1.2.2 Modeling and Simulation

The Simulation module is enhanced to include the following new features:

- It is now possible to simulate an entire customer relationship as well as a customer.
- Simulation now considers two additional attributes: Unit Cost and Standard Price, based on which Profitability and Discount are derived.
- Product simulation summary now includes additional information like impact on Product Revenue, Parent Product Revenue, Division Revenue, and Profitability.
- Indicate rate as basis points or percentage in product simulation
- Product simulation results indicate the impact of simulation (product or pricelist) on individual customers who are affected by the change (You can see the Impact % and Profitability %)
- Apply back deal details to source system (ORMB): The release includes an end-point for pointing to a service, along with a reference implementation that you can customize to suit your implementation-specific requirements. You can customize the reference implementation by editing the files (sequences.sql and PKG\_RMB\_APPLY\_BACK\_SAMPLE.sql) available in the <TEMPDIR>/ORMBA-V2.2.1.0.0-Database/REP/sample folder, where <TEMPDIR> is the path to media pack.
- Enable or disable simulation facility for a customer based on ORMB setting (Fixed Price Y/N indicating whether the customer is having a fixed price contract or not). By default, simulation is enabled.

## 1.2.3 Dashboard Accessibility

With this release, the ORMBA Dashboard home page changes dynamically for different users, based on their predefined roles. A user's access is restricted to only those dashboards to which they are entitled to view, based on their user definition in ORMBA Admin UI.

A set of pre-defined roles are available with the product; additionally, you can create custom roles.

The pre-defined roles available with this release are:

Role	Description
ORMBAAdmin	ORMBA Administrator
ORMBARM	Relationship Manager
ORMBARMSupervisor	Supervisor
ORMBAITOperations	IT Operations Personnel
ORMBAManagement	ORMBA Management
ORMBAPM	Product Manager

The roles applicable for ORMBA Mobile App are ORMBAManagement and ORMBAAdmin.

## 1.2.4 Role-based Data Level Security

This release introduces data-level security for Product Managers. That is, users with ORMBAPM role will be able to view pricing data of the only those products that they manage. This is applicable for the pricing dashboards:

- Product Pricing
- Billable Charges

## 1.2.5 Customer Dashboard

The current release introduces the following changes to Customer dashboard:

- **Summary Page:** The home page of Customer dashboard is now revamped to show an executive summary of the customer status and includes the following additional analyses:
  - **Revenue Comparison:** Comparative analysis of revenue from the selected customer with the rest of the customers under the same RM, same customer segment, same division, as well as with the rest of the customers in the system
  - **Customer Performance Watch List:** Shows the fluctuations of customer KPIs, along with the target and actual values
  - **Pricing Watch List:** Displays the status and percentage variance of Agreed Price, Ignored, and Zero Priced attributes
  - **Alerts:** Displays alerts and messages indicating period of inactivity (when it exceeds one month) and commitment score
- **Customer IDs:** With this release, the customer profile includes several configurable customer identifiers.
- **Actuals Vs Committed:** This release introduces a new analysis that shows you a comparison of the customer's commitments while creating the deal and the actual performance thereafter.

- **Customer Hierarchy:** With this release, you can view the entire hierarchy of a selected customer, along with the account profile and details.
- **Customer and Account Profile:** You can now view the complete customer profile, including the newly added customer identifier fields. Additionally, there is a new tab for accounts where you can view the account profile and details.
- **Customer Deals:** This release introduces a new page that lists all the deals created for the customer.
- **Simulate or Not:** With this release, the simulation option is available only to those customers for whom the ORMB setting, Fixed Price Y/N is set to **No** (default value), indicating the customer is not having a Fixed Price contract.

### 1.2.6 ORMBA Spatial

The ORMBA Spatial feature now includes some additional features:

- **Zoom-in, Zoom-out:** You can zoom-in or zoom-out on the map while viewing the details. For example, the FT dashboard, by default, indicates revenue by country. On zooming in, you can view the revenue details by state. Further zooming in, you can view the revenue details by customer segment within the state. This feature can be extended to zoom-in further (like County levels) if data is available.
- **Drill Down:** You can click on a chart in the map to drill-down and view its details. This is a powerful capability of FT dashboard and helps in region-based analysis of revenue.

### 1.2.7 Drill-Down Reports

With this release, the drill-down reports are available for all ORMBA dashboards. The drill-down reports included in this release are for the following dashboards:

- Contracts
- To-Do

### 1.2.8 Dashboard Look and Feel

The Login page of ORMBA dashboard uses a new theme in this release. Additionally, the landing page after the user logs in is also now changed.

## 1.3 Administration UI

This section details the major features introduced in this release of ORMB Analytics Administration user interface.

### 1.3.1 Characteristic Mapping of Facts

It is now possible to map characteristic codes to facts also. With this release, you can map to following facts:

- BF\_ADJUSTMENT
- BF\_PRICE

The UDD fields of BD\_ADJ\_UDD1 and BD\_PRICE\_UDD1 are respectively used for this extension.

### 1.3.2 New Pages

The current release introduces two new pages in ORMBA Admin UI to support the workflow configuration for ORMBA Dashboards.

- **User Definition:** To create user definition for ORMBA dashboard users, including Roles and other attribute values for a specific period.
- **Workflow:** To create a workflow and assign number of levels and approvers for each level

### 1.3.3 Online Help

This release introduces online help feature for the ORMBA Administration UI. On clicking the Help button on a page, you can access the Help page and read the documentation for the page.

## 1.4 Other Updates in This Release

This section lists the product updates that are not visible, but has a direct impact on the product performance and usage.

### 1.4.1 Platform Upgrade

With this release, ORMBA server operating system is upgraded to Oracle Linux 7 / Red Hat Linux 7.

### 1.4.2 Functional Overview Document

The Functional Overview document for ORMBA is retired with this release as the information in this document is now included in the Online Help for ORMBA Admin Tool. However, all versions of the document are available in the product's document library.

### 1.4.3 Installation Process Update

We have updated the ORMBA installation process with this release, the major highlights of which are:

- This release introduces additional checks to validate the parameter values given in ormba.properties file during the initials steps of ETL installation itself. This lets the system 'Fail Fast' and prevents issues that may crop up at later stages of installation due to incorrect configurations of the ormba.properties file.
- The Golden Gate configurations while installing in OFFLINE mode are now simplified. This reduces the time for configuring GG in OFFLINE mode by 75%.

## 2. Supported Platforms

### 2.1 Server

The following table lists the operating system and software combinations on which Oracle Revenue Management and Billing Analytics Version 2.2.0.0.0 is supported:

Software	Version
Operating System (Server)	Oracle Linux 7 (64-bit) Red Hat Enterprise Linux 7 (64-bit)
Chipset	x86 -64
Database Server	Oracle 12.1.0.2.0

### 2.2 Software

Software	Version
Oracle Fusion Middleware Infrastructure	12.1.3.0.0
Oracle Data Integrator	12.1.3.0.0
Oracle GoldenGate	12.1.2.1.0
Oracle GoldenGate Management Pack	12.1.3.0.0
Java Development Kit	1.7.0_71
Oracle Business Intelligence Enterprise Edition	12.2.1.0.0

### 2.3 Web Browser

The browser types and versions supported in this release are:

#### 2.3.1 Administration UI

Browser	Supported Version
Internet Explorer	11
Firefox	45+

## 2.3.2 Dashboards & Reports

Browser	Supported Version
Firefox	45+
Internet Explorer	11

## 2.3.3 Mobile App

Operating System	Supported Version
Android	Lollipop
iOS	8.3+

**Note:** Oracle Revenue Management and Billing Analytics Version 2.2.1.0.0 is supported on Oracle Unbreakable Enterprise Kernel.

Oracle Revenue Management and Billing Analytics Version 2.2.1.0.0 is supported on Oracle VM 2.2.2. Refer to the knowledge base article ID 249212.1 on My Oracle Support for Oracle's Support Policy on VM Ware.

## 2.4 Source System – ORMB

Source System	Version
ORMB	2.5.0.2.0
Oracle Database*	12.1.0.2.0

\*The source system database must be installed in non-PDB mode (single-tenant).

## 3. Product Documentation

User manuals and other technical documents are available in the Portable Document Format (PDF) format. You can download Oracle Revenue Management and Billing Analytics release specific documentation library (for example, Oracle Revenue Management and Billing Analytics Version 2.X.X.X.X Documentation Library) using the following URL:

<http://www.oracle.com/technetwork/indexes/documentation/fsgbu-1364781.html>

## 4. Media Pack Download

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Oracle Financial Services Revenue Management and Billing Analytics Version 2.2.1.0.0 and Oracle Insurance Revenue Management and Billing Analytics Version 2.2.1.0.0 media packs are available for the following platforms:

- Linux (x86-64)

The media pack includes the following packages:

- Oracle Revenue Management and Billing Analytics V2.2.1.0.0 Release Notes
- Oracle Revenue Management and Billing Analytics V2.2.1.0.0 Database Component
- Oracle Revenue Management and Billing Analytics V2.2.1.0.0 ETL Component
- Oracle Revenue Management and Billing Analytics V2.2.1.0.0 Dashboard Component
- Oracle Revenue Management and Billing Analytics V2.2.1.0.0 Web Component

To download a package from the media pack:

1. Log on to Oracle Software Delivery Cloud. The Export Restrictions page appears.
2. Click **Accept**. The SearchSoftware page appears.
3. Select **Oracle Financial Services Revenue Management and Billing Analytics** option or **Oracle Insurance Revenue Management and Billing Analytics** option from the **Product** list.
4. Click the **Select Platform** button and select **Linux x86-64**. The product is listed in the **Selected Products** section.
5. Click **Continue**. The available releases for the selected product are listed.
6. Select the radio button corresponding to **version 2.2.1.0.0** of the selected product.
7. Click **Continue**. The Oracle Standard Terms and Restrictions page appears.
8. Select the **I have reviewed and accept the terms of the Commercial License, Special Programs License, and/or Trial License** check box.
9. Click **Continue**. The contents of the media pack are listed.
10. To download all components, click **Download All**. If you want to download a specific component, click the zip file corresponding to the package that you want to download. The File Download dialog box appears.
11. Click **Save**. The Save As dialog box appears.
12. Browse to the location where you want to download the package and then click **Save**. The package is downloaded on your local machine.



## 5. Known Issues

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The known issue for release 2.2.1.0.0 is listed below:

<b>Issue #1</b>	Navigation issue in Modeller
<b>Description</b>	While viewing or editing the details a particular version of a model, the back button (↶) takes you back to the Modeller page, instead of the Model Details page.
<b>Work around</b>	You can navigate back to the Model Details page by clicking the model again.
<b>Current Status</b>	<b>OPEN</b>

<b>Issue #2</b>	Delay in Workflow Status Update in Deal Management
<b>Description</b>	When a user changes the deal status, the change in status is not instantly displayed in the Deal Management dashboard.
<b>Work around</b>	Wait for a couple of minutes for the change in status to be indicated in the Deal Management dashboard.
<b>Current Status</b>	<b>OPEN</b>

## 6. Technical Support

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For any technical support, consult with Oracle Support, Oracle Partner, or Oracle Consulting that may be supporting your implementation and upgrade process.