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Release Notes

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Oracle Revenue Management and Billing Analytics Release Notes

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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, along with the known issues or bugs (if any) that are part of this release.

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	February 2017	All	New document for release version 2.3.0.0.0

Contents

1.	What's New in Release v2.3.0.0.0?	7
1.1	Extractors & Schema	7
1.1.1	New Dimensions	7
1.1.2	Changes to Existing Dimension	7
1.1.3	New Facts	8
1.1.4	Others	8
1.1.5	Cost Computation	9
1.2	Dashboards & Reports	9
1.2.1	Insurance Dashboards	9
1.2.2	Enhanced Deal Management	9
1.2.3	Advanced Modeling Features	10
1.2.4	Usage and Revenue Analysis	10
1.3	Administration UI	11
1.3.1	GG Alert	11
1.3.2	New Page	11
1.3.3	Global Settings and Source Instance Parameters	11
1.3.4	Currencies To Configure	11
1.3.5	Wait Reason for Jobs	12
1.3.6	Accessibility Preferences	12
1.4	Other Updates in This Release	12
1.4.1	OAG Compliance	12
1.4.2	RESTful Web services for Simulation	12
1.4.3	Documentation Updates	12
2.	Supported Platforms	13
2.1	Server	13
2.2	Software	13
2.3	Web Browser	13
2.3.1	Administration UI	13
2.3.2	Dashboards & Reports	14
2.3.3	Mobile App	14
2.4	Source System – ORMB	14
3.	Product Documentation	14
4.	Media Pack Download	15
5.	Known Issues	16
6.	Technical Support	17

1. What's New in Release v2.3.0.0.0?

ORMBA 2.3.0.0.0 is the first major release that is focused on Insurance / Healthcare domain. Additionally, the release introduces several new features that are grouped under logical heads given below:

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

1.1 Extractors & Schema

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

1.1.1 New Dimensions

ORMBA 2.3.0.0.0 introduces a few dimensions for its Insurance/Healthcare product. The new dimensions introduced in this release are:

- **BD_SUBSCRIBER:** This dimension provides Policy Subscriber related details like Subscriber Name, Subscriber ID, Address, State, Country, Email ID, and other subscriber related attributes.
- **BD_DEPENDENT:** This dimension provides information of Dependants' in the policy like Dependent Name, Dependent ID, Address, State, Country, email-ID and other dependent related attributes.
- **BD_BROKER:** This dimension provides Broker's information like Broker Name, Broker ID, Address, Email-ID, and other broker related attributes.
- **BD_PER_MEMBERSHIP:** This dimension provides details of members included in the policy. For each member, details like Membership ID, Plan ID, Policy ID, Subscriber Number, Person ID, etc.
- **BD_CONTACT_TYPE:** This dimension provides details of communication modes used for customer contacts such as Contact Type, Contact Class, etc.
- **BD_POLICY_EVENT_TYPE:** This dimension provides Policy lifecycle events such as Enrollment, Renewal, Termination, Reinstate etc.
- **BD_POLICY:** This dimension provides Policy related details such as Policy ID, Policy Number, Subscriber ID, Account ID, Create Date, Start Date of the Policy, End Date of the Policy, Renewal Threshold, Termination Threshold, etc.

1.1.2 Changes to Existing Dimension

The existing dimension BD_ACCT is updated in this release to include a new field BILL_LEAD_DAYS. This field determines the bill lead days (Number of days).

1.1.3 New Facts

The new facts introduced in this release for Insurance domain are:

- **BF_COVERAGE_EVENT:** This fact provides details of membership-related events such as enrolling a new member to a plan, removing a dependant, re-instating a dependant, etc.
- **BF_CONTACT:** This fact provides logs of Customer Contacts .
- **BF_POLICY_EVENT:** This fact provides details of policy-related events such as enrolling to a new policy, cancellation or reinstating a policy.

The new fact introduced for Banking domain is:

- **BF_BILL_CHG:** This fact includes transaction attribute mappings that help a user to slice and dice (simulate) data based on transaction attributes. By default, the job corresponding to this fact is not enabled.

1.1.4 Others

The materialized views introduced with this release are:

- **Insurance:** 24 new views that include the monthly and accumulating snapshots of Policy, Coverage and Customer Contact details.
 - BM_MEMBERS_DETAILS_MV
 - BM_MEMBERS_TOTAL_BY_MONTH_MV
 - BM_MEMBER_BY_PLAN_MONTH_MV
 - BM_MEMBER_BY_PLAN_STATE_MON_MV
 - BT_MEMBER_BY_MONTH_TEMP_MV
 - BM_MEMBER_LOST_SUB_BY_MONTH_MV
 - BM_MEMBER_BRK_REV_BY_MONTH_MV
 - BM_COVERAGE_PERIOD_MV
 - BM_CC_COUNT_BY_DAY_MV
 - BM_CC_COUNT_BY_MONTH_MV
 - BM_CC_COUNT_DETAIL_BY_MONTH_MV
 - BM_CC_COUNT_DETAILS_BY_DAY_MV
 - BM_CC_PLAN_BY_MONTH_MV
 - BM_CC_VAR_FROM_LAST_MON_MV
 - BM_POLICY_CNT_BY_MONTH_MV
 - BM_POLICY_PLAN_KPI_BY_MONTH_MV
 - BT_POLICY_PLAN_KPI_TEMP1_MV
 - BT_POLICY_PLAN_KPI_TEMP2_MV
 - BM_POLICY_SNAPSHOT_BY_MONTH_MV

- BM_POLICY_SNAPSHOT_MV
- BT_POLICY_SNAPSHOT_TEMP1_MV
- BM_POLICY_TYPE_CNT_BY_MONTH_MV
- BM_BRK_DETAILS_MONTH_MV
- BM_BRK_PRINT_REP_MV
- **Banking:** 1 new Materialized View with monthly snapshot of billable charges grouped by transaction attributes
 - BM_BILL_CHG_DET_MV

1.1.5 Cost Computation

Cost computation of billable charges in ORMBA is enhanced to include four factors - internal variable, internal fixed, external fixed and external variable. These factors can be defined at either Price Assignment level or against a combination of Product and Division. The computed cost of a billable charge would be these factors multiplied with the number of transactions. It is also possible to compute cost by applying an SQI in place of number of transactions. The cost definition is done in ORMB as characteristics and are then mapped in ORMBA through Characteristic Map page of ORMBA Admin UI.

1.2 Dashboards & Reports

This section includes the features introduced in ORMBA Dashboards and Reports.

1.2.1 Insurance Dashboards

Oracle Insurance Revenue Management and Billing Analytics introduce a set of nine dashboards with more than 300 analyses for its Insurance domain. The dashboards for Insurance domain are:

- Executive Summary
- Membership
- Broker
- Customer
- Customer Contact
- Financial Transactions
- Billing
- Products and Charges
- To Do

1.2.2 Enhanced Deal Management

This release introduces the following new features in the Deal Management module of ORMBA:

- The Deal Management approval workflow now displays more information about each stage of approval, like the list of approvers.

- Users with Administrative Privileges can now perform common administrative tasks like:
 - Change status of a deal
 - Submit a deal
 - Approve a deal
 - Reject a deal
 - Accept a deal
 - Decline a deal
 - Apply back the deal details on source system
- With this release, two templates are available for proposal printing – Internal and External. An external format includes information about the deal that are relevant to the customer; whereas the internal format includes details like profitability and discount also.
- There is a new facility for Relationship Managers to specify an overall deal discount (%) or profit margin (%) and based on this, system automatically back spread the price changes across the deal items, achieving this through reverse computation.

1.2.3 Advanced Modeling Features

The Modeling / Simulation module now includes the following new features:

- Provision to set a desired discount (%) or profit margin (%) while simulating a pricelist.
- Provision to merge or split price assignments within a pricelist
- It is now possible to aggregate or disaggregate products within a pricelist. A Product Manager can aggregate more than one product to form a new product. They can simulate and find out the impact of aggregation on the total revenue. Similarly, based on some transaction attributes, it is possible to disaggregate a product's transactions into two products and find the revenue impact. The Product Manager uses the Modeler to simulate the changes and find the revenue impact. Once the changes are applied back to the source system, the corresponding pricelist is updated and new products are created.
- Simulation now supports minimum, maximum and summary fees of a product. Simulation of these dependant charges creates a cascading impact on overall charges of the product.

1.2.4 Usage and Revenue Analysis

ORMBA now introduces Usage or Revenue based segmentation of customers who are using a product. Customers using a product are classified into different buckets based on average unit price applied to them. The page shows the customers categorized under various percentiles of usage or revenue.

A Product Manager examines the distribution of average unit price across various customers, identifies the re-pricing opportunities and marks these customers for re-pricing. This triggers an alert to the respective Relationship Manager, who can simulate and see the impact on overall revenue while moving the customer from one percentile to another. After arriving at an acceptable model, the changes are applied back to the source system.

1.3 Administration UI

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

1.3.1 GG Alert

ORMBA 2.3.0.0.0 release introduces a new feature to monitor failure of replication processes, in absence of Oracle Golden Gate Monitor. With this enhancement, it is possible to check if GG is AbEnd at pre-configured intervals and if yes, system triggers email notifications. The GG Check Interval is configured in the GG Parameters page of ORMBA Admin UI against each replication group, and the mail configuration and scheduling is done using ODI Studio. To know more details about this feature, see *ORMBA Admin Guide*.

1.3.2 New Page

ORMBA Administration UI has a new page for Banking installation to map application role definitions. Using the new page (*Role Definition*), administrative users can map dashboard roles to those created in Weblogic and define an application profile for those user roles.

1.3.3 Global Settings and Source Instance Parameters

The Global Settings and Source Instance pages include several new parameters. The major additions are:

- In Global Settings page:
 - New parameter to distinguish between Insurance and Banking installations
 - New set of parameters related to ORMB webservice (end point, username and password)
 - Parameters to define the number of buckets for usage and revenue analyses
 - Parameter to enable or disable daily pricing
- In Source Instance page:
 - Characteristic codes to capture SQI for cost computation and cost rates, for each product
 - Characteristic codes to capture SQI for cost computation and cost rates, for each price assignments
 - Insurance-specific parameters like Relationship Type Codes to identify Subscribers, Brokers, children, legal spouse, etc.

1.3.4 Currencies To Configure

The Indicative FX page of ORMBA Admin UI now includes a button – Currencies to Configure. This button helps the administrator in finding out the currencies for which they need to configure the indicative exchange rates. The button lists the currencies in which the data is available from the source system and for which the exchange rates (indicative) need to be configured in the system. This avoids the job errors that would have been otherwise caused by unavailability of exchange rates.

1.3.5 Wait Reason for Jobs

The Job Status View page lists the jobs that are waiting for execution. You can view the reasons why the job is not ready and take appropriate actions, if needed. The list of reasons and whether they require user intervention or not is available in the ORMBA Admin guide.

1.3.6 Accessibility Preferences

ORMBA Admin Tool now has an additional setting that enables its users to configure their preferred accessibility settings. The settings available are:

- Screen Reader
- High Contrast
- Large Fonts

Based on the settings selected and saved, the current login session of the UI changes instantaneously.

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 OAG Compliance

The ORMBA Admin Tool and online help are now compliant with Oracle Accessibility Guidelines (OAG) version 2.0.

1.4.2 RESTful Web services for Simulation

With this release, ORMBA introduces a set of RESTful web services. These ORMBA web services support 'HTTP Basic Authentication' model wherein the caller has to provide their username and password for authentication. The WebLogic server authenticates the users by based on the credentials available in the embedded WebLogic LDAP server.

1.4.3 Documentation Updates

We have updated the following ORMBA documentation with this release, the major highlights of which are:

- **Install Guide:** The list of ormba.properties file attributes and their descriptions that were previously available in the Install Guide is now removed. This information is now available in the ormba.properties file itself.
- **Data Map:** The data map of the product, which was previously available in Oracle Tech Network (along with the product documentation), is now available within the media pack itself. The data map is now retired from OTN.

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 recommended in this release are:

2.3.1 Administration UI

Browser	Recommended Version
Internet Explorer	11
Firefox	45+

2.3.2 Dashboards & Reports

Browser	Recommended Version
Firefox	45+

2.3.3 Mobile App

Operating System	Recommended Version
Android	Lollipop
iOS	8.3+

Note: Oracle Revenue Management and Billing Analytics Version 2.3.0.0.0 is supported on Oracle Unbreakable Enterprise Kernel.

Oracle Revenue Management and Billing Analytics Version 2.3.0.0.0 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	2.5.0.4.0
	2.5.0.3.0
Oracle Database	12.1.0.2.0

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

Oracle Financial Services Revenue Management and Billing Analytics Version 2.3.0.0.0 and Oracle Insurance Revenue Management and Billing Analytics Version 2.3.0.0.0 media packs are available for the following platforms:

- Linux (x86-64)

The media pack includes the following packages:

- Oracle Revenue Management and Billing Analytics V2.3.0.0.0 Release Notes
- Oracle Revenue Management and Billing Analytics V2.3.0.0.0 Database Component
- Oracle Revenue Management and Billing Analytics V2.3.0.0.0 ETL Component
- Oracle Revenue Management and Billing Analytics V2.3.0.0.0 Dashboard Component
- Oracle Revenue Management and Billing Analytics V2.3.0.0.0 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 2.3.0.0.0** 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

The known issues for release 2.3.0.0.0 are listed below:

Issue #1	Navigation issue in Modeller
Description	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.
Work around	You can navigate back to the Model Details page by clicking the model again.
Current Status	OPEN

Issue #2	Delay in Workflow Status Update in Deal Management
Description	When a user changes the deal status, the change in status is not instantly displayed in the Deal Management dashboard.
Work around	Manually refresh the page or wait for a couple of minutes for the change in status to be indicated in the Deal Management.dashboard.
Current Status	OPEN

Issue #3	Simulation / Modeling incompatible with IE and Google Chrome
Description	Simulation features are not supported in IE and Chrome due to a security restriction in these browsers.
Work around	Use Mozilla Firefox for Modeling
Current Status	OPEN

Issue #4	Inconsistencies in Simulation while using Mozilla Firefox
Description	While simulating using Firefox, there will be inconsistencies.
Work around	In Mozilla Firefox, set the value of security.csp.enable to false .
Current Status	OPEN

Issue #5	ETL unable to handle multiple brokers against a policy
Description	If a policy has multiple broker information available, ETL takes only one value into data warehouse.
Work around	No workaround as of now
Current Status	OPEN

6. Technical Support

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