

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

Version 2.3.1.0.0

## **Release Notes**

Revision 1.0

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## Oracle Revenue Management and Billing Analytics Release Notes

E53534-01

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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	June 2017	All	New document for release version 2.3.1.0.0

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# 1. What's New in Release v2.3.1.0.0?

ORMBA 2.3.1.0.0 release introduces several new features that are grouped under logical heads given below:

- Extractors & Schema
- Financial Services Dashboards
- Insurance Dashboards
- Administration UI
- 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 2.3.1.0.0 introduces a few dimensions for its Insurance/Healthcare product. The new dimensions introduced in this release are:

- **BD\_OD\_PROCESS**: This dimension provides a log of the Overdue process, including details like status, date on which it is created, customer/account for which it is executed, and other attributes related to the overdue process.
- **BD\_OD\_EVENT\_TYPE**: This dimension provides details of events triggered by Overdue process like the type of event and other event related attributes of the Overdue process.
- **BD\_OD\_PROCESS\_UDD1** to **BD\_OD\_PROCESS\_UDD5**: These are user-defined dimensions that can be used in future to add extra attributes related to Overdue process.
- **BD\_COVERAGE\_UDD2** to **BD\_COVERAGE\_UDD5**: These are user-defined dimensions that can be used in future to add extra attributes related to Coverage event.
- **BD\_CONTACT\_UDD2** to **BD\_CONTACT\_UDD5**: These are user-defined dimensions that can be used to add extra attributes related to Customer Contacts.

### 1.1.2 Changes to Existing Dimensions

The current release updates some existing dimensions in Insurance domain. The dimensions updated in this release are:

Dimension	Description of change
<b>Account</b>	New field to indicate whether the Overdue process will be created or not for that account
	New field to identify whether it is an 'On Exchange' and 'Off Exchange' account

Dimension	Description of change
<b>Customer</b>	Date since the customer is available in the system
	New field to identify if the customer has disability or not
	Start and end date of the employee
	Ethnicity of the customer and its description
	New field to identify if the customer is a student or not
	New field to identify if the customer is a veteran or not
	To identify if the customer is an individual or a group or a third party
<b>Membership</b>	To identify the program under which Membership is taken
	To identify the plan under which Membership is taken
	To identify the contract under which Membership is taken
<b>Coverage</b>	To identify the program under which Coverage is taken
	To identify the plan under which Coverage is taken
	To identify the contract under which Coverage is taken
	To identify if the coverage is for a Primary plan or not
	To indicate the billing frequency
<b>Policy</b>	To identify the date through which payment is made
<b>Contract Type</b>	To identify if the contract type is Overpayment

### 1.1.3 New Facts

ORMBA 2.3.1.0.0 introduces a new fact in Insurance domain, **BF\_OD\_PROCESS\_EVENT**. This fact includes event details of Overdue process, such as Event trigger date, status date, event status and bill id and other attributes related to Overdue events.

This release also introduces a new fact in Banking domain, **BF\_CONTACT** that provides logs of Customer Contacts. This fact was already available for Insurance domain.

### 1.1.4 Others

The materialized views introduced with this release are:



- **For Insurance domain:**
  - BM\_MEMBER\_LOST\_DETAILS\_MV
  - BM\_MEMBER\_REINSTATE\_DTLS\_MV
  - BM\_PROD\_PLAN\_TYPE\_MV
  - BM\_POLICY\_EVENT\_BY\_MONTH\_MV
  - BM\_MEMBER\_TOT\_BY\_MONTH\_MV
  - BM\_OD\_BILL\_DETAILS\_MV
  - BM\_OD\_DETAILS\_BY\_MONTH\_MV
  - BM\_OD\_EVT\_DETAILS\_BY\_MONTH\_MV
  - BM\_OD\_EVT\_AGEING\_BY\_MONTH\_MV
  - BM\_PAY\_TNDR\_PROD\_BY\_MONTH\_MV
  - BM\_OD\_PROCESS\_EVT\_BY\_MNTH\_MV
  - BM\_OD\_VS\_WO\_AMT\_BY\_MONTH\_MV
  - BM\_MEMBER\_CHURN\_BY\_MONTH\_MV
- **For Banking domain:**
  - BM\_CC\_COUNT\_DETAIL\_BY\_MONTH\_MV
  - BM\_CC\_COUNT\_DETAILS\_BY\_DAY\_MV

## 1.2 Financial Services or Banking Dashboards

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

### 1.2.1 New Dashboard in Banking

With this release, Oracle Financial Services Revenue Management and Billing Operations Manager's Workbench introduces a new dashboard, Customer Contacts. This dashboard includes several analyses that pertain to the various types of customer contacts recorded in the system and has been extended from the Insurance domain.

### 1.2.2 Enhancements in Deal Management

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

- It is now possible to view the workflow details against a deal before it is submitted for approval. With this feature, even prior to submission, Relationship Manager can view details like the stages involved in the approval workflow and the approvers for each stage.
- Relationship Managers can now create a new deal from an existing deal. The newly created deal would inherit all attributes from the existing deal. However, the RM can edit the commitments and pricing rules for the new deal.

### 1.2.3 Enhancements to Customer Dashboard

This release introduces the following new features in Customer dashboard of ORMBA:

- It is now possible to view the products and pricing available for a customer at real time. The Customer dashboard now shows the real-time product and price details applicable for the selected customer by connecting with the source system (ORMB).
- The customer dashboard is enhanced to include additional information like the customer's refund, write-off and contact details.

## 1.3 Insurance or Healthcare Dashboards

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

### 1.3.1 New Dashboard in Insurance

A new dashboard, Collections has been introduced as part of this release, which provides a detailed analysis of the Overdue process functionality available in ORMB. It includes several key details including:

- Accounts for which Overdue process is active
- Distribution of OD accounts across Direct and Exchange enrollment channels
- Net Overdue amount and number of overdue bills
- Actionable insights such as subscribers and states with largest overdue amounts, net amount expected to be written off, and a priority wise distribution of accounts that are to be terminated
- Several Collections related time-series analysis, including the distribution of overdue amounts, number of overdue accounts, and an overdue trend based on programs

As part of the release, the Payment Tenders dashboard, which was earlier a part of Financial Transactions, has been moved to within the Collections dashboard.

### 1.3.2 Enhancements to Membership Dashboard

The Membership dashboard has been enhanced to include additional analyses and metrics to provide a more holistic view of the member base. Some of the features include:

- A new summary page that provides a snapshot of the membership base including Program based analysis and distribution across Direct and On-Exchange enrollments, re-instated and lost subscribers and Bill frequency by Plans
- A separate dashboard page for Policy which summarizes policy related information including uptake across States, policy status and net Premiums collected
- Additional analyses within the Ranking page for measuring Churn across Plan types

## 1.4 Administration UI

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

### 1.4.1 New Page

ORMBA Administration UI has a new page for Insurance installation to create group definitions. Using the new page (*Group Definition*), administrative users can create various age groups and salary groups.

### 1.4.2 Insurance-specific Source Instance Parameters

The Source Instance page in Insurance installation now includes several new parameters. The parameters are:

- Status codes to identify the status of a Policy
- Event Codes for different types of events
- Codes to identify gender of customers
- Codes to identify the customer class
- Codes to identify the customer's marital status
- Codes to identify Overdue details
- Account class codes to identify On and Off Exchanges

### 1.4.3 Golden Gate Parameter Validation

This release ensures validation of all golden gate parameter values while being configured using the GG Parameters page in ORMBA Admin UI. The page throws error if the entered value does not match the expected format.

## 1.5 Other Updates

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

### 1.5.1 Export Import Utility

This release includes a utility to export and import metadata configuration changes from one environment to another. The Export Import utility is available for both Financial Services and Insurance installations, within the ETL component folder of the media pack. The utility can be used to export and import metadata changes of the entire set of tables or a selected set.

## 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 2.3.1.0.0 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 2.3.1.0.0 is supported on Oracle Unbreakable Enterprise Kernel.

Oracle Revenue Management and Billing Analytics Version 2.3.1.0.0 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	2.5.0.4.0
	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

The various media packs available for ORMBA version 2.3.1.0.0 and the component folders within each media pack are listed below:

Product	Component Folders
Oracle Financial Services Revenue Management and Billing Extractors and Schema	Oracle Revenue Management and Billing Analytics V2.3.1.0.0 Database Component for Banking
	Oracle Revenue Management and Billing Analytics V2.3.1.0.0 ETL Component for Banking
	Oracle Revenue Management and Billing Analytics V2.3.1.0.0 Web Component for Banking
	Oracle Revenue Management and Billing Analytics V2.3.1.0.0 Release Notes
Oracle Financial Services Revenue Management and Billing Operations Manager Workbench	Oracle Revenue Management and Billing Analytics V2.3.1.0.0 Operations Manager Workbench Component for Banking
	Oracle Revenue Management and Billing Analytics V2.3.1.0.0 Release Notes
Oracle Financial Services Revenue Management and Billing Product Manager Workbench	Oracle Revenue Management and Billing Analytics V2.3.1.0.0 Product Manager Workbench Component for Banking
	Oracle Revenue Management and Billing Analytics V2.3.1.0.0 Release Notes
Oracle Financial Services Revenue Management and Billing Relationship Manager Workbench	Oracle Revenue Management and Billing Analytics V2.3.1.0.0 Relationship Manager Workbench Component for Banking
	Oracle Revenue Management and Billing Analytics V2.3.1.0.0 Release Notes
Oracle Insurance Revenue Management and Billing Extractors and Schema	Revenue Management and Billing Analytics V2.3.1.0.0 Database Component for Insurance
	Oracle Revenue Management and Billing Analytics V2.3.1.0.0 ETL Component for Insurance
	Oracle Revenue Management and Billing Analytics V2.3.1.0.0 Web Component for Insurance

Product	Component Folders
	Oracle Revenue Management and Billing Analytics V2.3.1.0.0 Release Notes
Oracle Insurance Revenue Management and Billing Executive Dashboards	Oracle Revenue Management and Billing Analytics V2.3.1.0.0 Executive Dashboards Component for Insurance
	Oracle Revenue Management and Billing Analytics V2.3.1.0.0 Release Notes
Oracle Insurance Revenue Management and Billing Operations Manager Workbench	Oracle Revenue Management and Billing Analytics V2.3.1.0.0 Operations Manager Workbench Component for Insurance
	Oracle Revenue Management and Billing Analytics V2.3.1.0.0 Release Notes

To download the current release, follow the procedure below:

1. Log on to Oracle Software Delivery Cloud. The Export Restrictions page appears.
2. Click **Accept**. The SearchSoftware page appears.
3. Search for the required product in the **Product** list. Refer to the list above for the exact name of the product.
4. The product is listed in the **Selected Products** section. If needed, add multiple products.
5. Click **Continue**. The available releases for the selected product are listed.
6. Click **Continue**. The Oracle Standard Terms and Restrictions page appears.
7. Select the “**I have reviewed and accept the terms of the Commercial License, Special Programs License, and/or Trial License**” check box.
8. Click **Continue**. The contents of the media pack are listed.
9. 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.
10. Click **Save**. The Save As dialog box appears.
11. 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 this release are:

<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>	Manually refresh the page or 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>

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

<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>CLOSED</b>

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



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