

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

Version 2.7.0.0.0

### **Release Notes**

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## Oracle Revenue Management and Billing Analytics Release Notes

E53534-01

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# Preface

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## 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	May 2018	All	New document for release version 2.7.0.0.0
1.1	July 2018	1.6.1	Minor update

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# 1. What's New in Release v2.7.0.0.0?

ORMBA 2.7.0.0.0 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 2.7.0.0.0 introduces a few dimensions for Banking as well as Insurance.

The new dimensions introduced in Banking are:

- **BD\_DSPT\_REQ\_TYPE** and **BD\_DSPT\_UDD1** to hold details of Bill Dispute

The dimensions newly introduced in Healthcare are:

- **BD\_PTP** and **BD\_PTP\_UDD1** to **BD\_PTP\_UDD5**: Includes details of Promise to Pay Agreement like, promise to pay id, type, payee account id, payee customer id, payment method, total schedule amount details, etc. along with user-defined dimensions that can be used in future to add extra attributes related to Promise to Pay agreement process
- **BD\_PA\_REQ** and **BD\_PA\_REQ\_UDD1** to **BD\_PA\_REQ\_UDD5**: Includes details of Payment Agreement like, payment request id, type, payee account id, payee customer id, payment method, total schedule amount details, etc. along with user-defined dimensions that can be used in future to add extra attributes related to Payment Agreement Request process
- **BD\_DISCREPANCY** and **BD\_DISCREPANCY\_UDD1** to **BD\_DISCREPANCY\_UDD5**: Includes details of Discrepancy like, discrepancy id, type, pay instruction file name, status updated date details, etc. along with user-defined dimensions that can be used in future to add extra attributes related to Discrepancy process
- **BD\_RECON** and **BD\_RECON\_UDD1** to **BD\_RECON\_UDD5**: Includes details of Reconciliation like, reconciliation id, type, payee account id, file name of pay instruction, created by, status updated date details, etc. along with user-defined dimensions that can be used in future to add extra attributes related to Reconciliation process

## 1.1.2 Changes to Existing Dimensions

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

- For Finance domain:
  - **Account:** Five new columns
  - **Price Assignment:** Nine new columns
  - **Rate Component:** Seven new columns
- For Insurance domain:
  - **Product:** Two new fields to identify the plan type and its description

## 1.1.3 New Facts

ORMBA 2.7.0.0.0 introduces a new fact in Banking domain.

- **BF\_DISPUTE:** This fact holds monthly dispute details of customers in ORMB.

This release also introduces a few facts in Insurance domain:

- **BF\_PTP\_EVENT:** This fact holds information related to Promise To Pay agreement event.
- **BF\_PA\_REQ\_EVENT:** This fact holds information related to Payment Agreement (PA) request event.
- **BF\_DISCREPANCY:** This fact holds information related to discrepancy process.
- **BF\_RECON:** This fact holds information related to reconciliation process.
- **BT\_PTP\_SCHED\_DTLS:** This fact holds information related to promise to pay agreement schedule details.
- **BT\_PA\_REQ\_SCHED\_DTLS:** This fact holds information related to PA request schedule details.
- **BT\_DISCREPANCY:** This fact holds information related to discrepancy process. It also includes details like, Discrepancy ID, Discrepancy Amount, Account Id, Billed Amount, Paid Amount, Plan Id, Plan type details, etc.
- **BT\_PAY\_INS:** This fact holds information related to payment instruction process. It also includes details like, Pay Instruction Id, Pay Instruction Amount, Entity Name, Bill Id, Discrepancy Id, Created Date details, etc.

## 1.1.4 Others

The materialized views introduced with this release are:

- **For Banking domain:**
  - BM\_DSPT\_AGEING\_MV
  - BM\_DSPT\_MANAGEMENT\_DTLS\_MV
- **For Insurance domain:**
  - BM\_RECON\_CREATED\_BY\_MONTH\_MV
  - BM\_RECON\_CREATED\_BY\_DAY\_MV
  - BM\_RECON\_STATUS\_BY\_MONTH\_MV
  - BM\_RECON\_AGEING\_MV
  - BM\_DISCREPANCY\_BY\_MONTH\_MV
  - BM\_PA\_REQ\_DTLS\_BY\_MONTH\_MV
  - BM\_PA\_STAT\_WRKFLW\_MV
  - BM\_PTP\_DTLS\_BY\_MONTH\_MV
  - BM\_PA\_SCHED\_DTLS\_MV
  - BM\_RECON\_STATUS\_CNT\_BY\_MON\_MV
  - BM\_AVG\_PAYMENT\_DAYS\_MV
  - BM\_BILL\_PAID\_OD\_AMT\_BY\_MON\_MV
  - BM\_BINDER\_PAYMENT\_BY\_MONTH\_MV
  - BM\_BILL\_PAID\_SAME\_MON\_MV
  - BM\_OD\_PA\_REALZD\_BY\_MON\_MV
  - BM\_OD\_PA\_LT\_PAY\_WO\_BY\_MNTH\_MV
  - BM\_PA\_EFF\_BY\_MON\_MV
  - BM\_PTP\_STATUS\_TILE\_MV
  - BM\_PA\_STATUS\_TILE\_MV

## 1.2 ORMB Deal Pricing

This section includes the features introduced in the Deal Pricing module as part of this release.

### 1.2.1 Deal Comparison

The deal comparison feature in Deal Management module now includes an option to compare their profitability as well as average price. This is in addition to the existing option of comparing revenues. This release also introduces the facility to export the comparison results into an excel sheet.

### 1.2.2 Price Recommendation

While creating a deal, ORMB now offers price recommendations based on the selected customer's profile. The price recommendations can be specific to a customer segment, or division, or a combination of both customer segment and division. This feature assists the deal creator in arriving at an optimal pricing for the deal.

### 1.2.3 Account Creation

The Deal Creation process now allows the creator to configure account attributes, while creating an account – product hierarchy. Previously, deal creator could only create a dummy account and attach a product to it. All account attributes mandatory for account creation in source system (ORMB) are now available for configuration. Some of the account attributes are Contract Type, Bill Cycle, Relation Type, Usage Type, Account Type, etc. Additionally, there is provision to configure account-specific identifiers and characteristics.

### 1.2.4 Prospect Customer and Deal Deletion

ORMBA 2.7.0.0.0 release allows a Relationship Manager user to delete their prospect customers, provided they do not have a deal that is applied back to source system. When the Relationship Manager deletes a prospect customer, their deals are deleted automatically, unless they are in Applied Back status in which case they cannot delete the prospect.

**Note:** If the access rights of a Relationship Manager is delegated to another user, the delegated user can also delete the prospect, provided they have full control access.

The current release also introduces an option to delete individual deals of a prospect customer. The Relationship Manager can delete one or more deals under a prospect, provided the deal is not applied back to the source system.

### 1.2.5 Deal Approval Workflow

It is now possible to configure either users or roles against each approval stage in the Deal approval workflow. Previously, each stage of approval workflow had one or more users for approval. This would be blocking the approval if a user were not available for promoting the deal to the next stage. With this enhancement, any user with the role would be able to promote the deal to the next stage, thereby expediting the process.

## 1.2.6 Average Fee

The final page of Deal Creation Process now displays the average fee against each of the products selected in the deal. This helps a user in simulating the deal pricing while there are multiple price assignments against a product. Previously, average fee (price) was available only at drilled down view (against each price assignment).

# 1.3 Financial Services or Banking Dashboards

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

## 1.3.1 Revenue Leakage Report

With this release, ORMBA introduces a new analysis that shows the revenue leakage due to an exception pricing offered to a customer. The new analysis is available within the Customer page of Relationship Manager Dashboard and lists all the products used by the customer during the selected month. Against each product, the analysis shows the revenue derived from the Agreed or Exception pricelist, along with a forecasted value of revenue, had they been in the Standard pricelist. The Relationship Manager can also view the percentage variation of agreed pricing from the standard pricing for each product, as well as the average for all products.

## 1.3.2 Access Control Delegation

The current release introduces the facility to delegate a relationship manager's access to another user for a specific period. This would ensure better business continuity in the absence of a relationship manager.

A relationship manager can create access control definitions that would delegate their access, either Full Control or Read Only, to another Relationship Manager. Once delegated, during the delegation period, the RM would have only read only access, while the delegated user will have either Full Control or Read Only access, depending on the configuration. The delegated user can create deals, approve or reject deals, delete prospects, accept or decline deals on customer behalf, and apply back a deal to the source system, provided they have Full Control access.

## 1.3.3 Dispute Management Reports

ORMBA 2.7.0.0.0 release introduces several analyses related to Bill Disputes. The release introduces a new dashboard page in the Financial Transactions dashboard to include analyses related to Bill Disputes.

## 1.4 Insurance or Healthcare Dashboards

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

### 1.4.1 Enhancements to Billing Dashboard

The current release includes some enhancements to the Billing dashboard. The new analyses added to the dashboard are:

- Couple of trend charts showing the trend of
  - Total number of bills generated and the number of bills against which payment has been made before the due date
  - Billed amount, Paid amount, and Overdue amount
- An analysis to show the metrics of bills under various status like Unpaid, Partially paid, and Fully paid
- An analysis showing the average number of days taken for payment, after the due date

### 1.4.2 Enhancements to Financial Transactions Dashboard

Financial Transaction dashboard now includes some additional analyses. The main features introduced in this release are:

- A new page is introduced in the Financial Transactions dashboard that contains several analyses related to Payment Reconciliation. Reconciliation process helps resolve discrepancies in billed items vs payments received over a period. The new page includes several reports and analyses pertaining to reconciliation and its discrepancies. This feature is applicable only for Group membership customers.
- Couple of new reports are introduced in Payments and Receivables page: Binder payment report in Payments page and Average policy size report in Receivables page.

### 1.4.3 Enhancements to Membership Dashboard

ORMBA 2.7.0.0.0 introduces Simulation capabilities to the Membership dashboard. This simulation enables the users to forecast the membership enrollment based on past turnover, thereby assisting them in projecting the revenue turnover. Three forecasting methods used for simulation are:

- Holts Winter
- Exponential Smoothing
- Moving Average

Predictions can be for a month or a quarter. The user has the option to predict member enrollment, membership premium amount, and total enrollment revenue.

### 1.4.4 Enhancements to Payments and Collections Dashboard

The current release introduces a few features in the Payments and Collections dashboard. The main changes are:

- Promise to Pay (PTP) feature available in ORMB is now extended to ORMBA dashboards as well. Promise to Pay is an agreement made by the customer with the insurance company to pay the overdue amount in multiple installments. The installments can be weekly, monthly or half-yearly depending on the agreement. The current release introduces several analyses related to PTP feature, which are included in the Payments & Collections dashboard. To see the list of all analyses available in the dashboard, see ORMBA Dashboard Index sheet.
- ORMBA dashboards introduces analyses related to Payment Agreement (PA) feature available in ORMB. Payment Agreement (PA) is a feature by which accounts with outstanding bills can avail installment facility to clear outstanding amount. Installment schedule is flexible (any future date, any amount) and new bills can be added in an existing active PA (after bill is overdue). Also existing installment schedule under active PA can be modified (like installment date can be changed, installment amount can be revised) for future schedule only. To see the list of all analyses introduced in the dashboard, see ORMBA Dashboard Index sheet.
- The Collections page and Collections Trend page in Payments & Collections dashboard are now enhanced to include new analyses related to Payment Agreement and Overdue. These analyses gives an insight on the subscribers and states with maximum overdue, along with a side-by-side comparison of overdue and realized amount for different states and programs. Trend charts that show the trend in overdue and late pay accounts over the previous year is also available. To see the list of all analyses available in the dashboard, see ORMBA Dashboard Index sheet.

## 1.5 Administration UI

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

### 1.5.1 New Parameters

The current release introduces a new parameter in the Global Settings page for Banking and two new parameters in the Source Instance page for Insurance installations. The newly introduced parameters are:

- For Banking installation:
  - Invoke external webservice for pricing
- For Insurance installation:
  - Relationship Type Codes to identify Pay Instruction for a Discrepancy
  - Relationship Type Codes to identify FT ID for a Pay Instruction

## 1.6 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.

### 1.6.1 Tech Stack Upgrade

ORMBA technology stack is updated in the current release. The supported technology versions are available in Chapter 2 – Supported Platforms.

Please note that Oracle Golden Gate Management Pack is no longer an optional component and part of the technology stack.

### 1.6.2 Changes to Installation Process

With this release, ORMBA installation is supported only in OFFLINE mode. Y

## 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 2.7.0.0.0 is supported:

- Operating System (Server)
  - Oracle Linux 7.1 (x86 -64)
  - Red Hat Enterprise Linux 7.1 (x86 -64)
- Database Server - Oracle 12.1.0.2.0

### 2.2 Software

- Oracle Fusion Middleware Infrastructure: 12.2.1.3.0
- Oracle Data Integrator: 12.2.1.3.0
- Oracle GoldenGate: 12.3.0.1.0
- Java Development Kit: 1.8.0\_161
- Oracle Business Intelligence Enterprise Edition: 12.2.1.3.0

### 2.3 Web Browser

The browser types and versions recommended in this release are:

- Administration UI
  - Internet Explorer 11
  - Mozilla Firefox 45+
- Dashboards & Reports
  - Mozilla Firefox 45.8+
  - Google Chrome 56.x+
- Mobile App
  - Android version Lollipop
  - iOS version 8.3+

**Note:** Oracle Revenue Management and Billing Analytics Version 2.7.0.0.0 is supported on Oracle Unbreakable Enterprise Kernel.

Oracle Revenue Management and Billing Analytics Version 2.7.0.0.0 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

- Oracle Revenue Management and Billing (ORMB) version 2.7.0.0.0
- Oracle Revenue Management and Billing (ORMB) version 2.6.0.1.0
- Oracle Database version 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

You can download the media packs for Oracle Revenue Management and Billing Analytics 2.7.0.0.0 from eDelivery. For detailed instructions on how to download the media pack, refer to the product installation guide available in the documentation library.

## 5. Known Issues

The known issue found in this release is:

<b>Issue #1</b>	Back button in dashboards not working as expected
<b>Description</b>	While drilling down multiple levels from an analysis, the Back button on the page intermittently results in a “Confirm Form Resubmission” page, instead of navigating to the previous page.
<b>Work around</b>	Instead of the Back button, use the breadcrumbs available at the bottom of the page to navigate to the previous page.
<b>Current Status</b>	<b>OPEN</b>

### 5.1 Issue Backlog

<b>Backlog Issue #1</b>	Initial load cannot handle data for more than 20 years
<b>Description</b>	It is not possible to extract data for a period more than 20 years.
<b>Work around</b>	No workaround as of now
<b>Current Status</b>	<b>OPEN</b>

<b>Backlog Issue #2</b>	Initial data migration process abends for certain currency symbols
<b>Description</b>	Some currency symbols in source system like ¢, ¥ causes data replication to abend as these characters are not supported by internal data load job.
<b>Work around</b>	Set Target and Source database character set as AL32UTF8
<b>Current Status</b>	<b>OPEN</b>

<b>Backlog Issue #3</b>	Mismatch in logging the history of changes in parent customer name
<b>Description</b>	For some scenarios, changes to the parent customer name are not properly updated to the Customer dimension.
<b>Work around</b>	No workaround as of now
<b>Current Status</b>	<b>OPEN</b>

<b>Backlog Issue #4</b>	ETL unable to handle multiple brokers against a policy in Healthcare / Insurance installations.
<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>

## 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.