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Release Notes

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About this Document

This document describes the new features, enhancements, UI and database level changes, supported platforms, framework upgrade, supported upgrades, and technology upgrade made in this release. It also highlights the discontinued features, bug fixes, and known issues in this release.

This document does not describe the functionality of Oracle Revenue Management and Billing or technical know-how on how to install or upgrade Oracle Revenue Management and Billing. For more detailed information, you can refer to the following documents:

Document	Description
<i>Oracle Revenue Management and Billing Banking User Guide</i>	Lists and describes various banking features in Oracle Revenue Management and Billing. It also describes all screens related to these features and explains how to perform various tasks in the application.
<i>Oracle Revenue Management and Billing Insurance User Guide</i>	Lists and describes various insurance features in Oracle Revenue Management and Billing. It also describes all screens related to these features and explains how to perform various tasks in the application.
<i>Oracle Revenue Management and Billing Installation Guide</i>	Lists the application server pre-requisites, supported platforms, and software and hardware requirements for installing the Oracle Revenue Management and Billing application. It explains how to install the Oracle Revenue Management and Billing application.
<i>Oracle Revenue Management and Billing Quick Installation Guide</i>	Provides high-level information on how to install the Oracle Revenue Management and Billing (ORMB) application and selected additional software.
<i>Oracle Revenue Management and Billing Database Administrator's Guide</i>	Provides information about the Oracle Database Server and Client required for installing the Oracle Revenue Management and Billing database. It explains how to install database with and without demo data. It provides database configuration guidelines including recommended settings for the Oracle Exadata Database machine.
<i>Oracle Revenue Management and Billing Server Administration Guide</i>	Explains the Oracle Revenue Management and Billing (ORMB) architecture and technical know-how required for configuring and using the ORMB application. It explains how to configure and deploy web and business application servers. In addition, it explains how to monitor client machines, web and/or business application servers, and database connections.

Document	Description
<i>Oracle Revenue Management and Billing Security Guide</i>	Lists the security features available in the Oracle Revenue Management and Billing application. It explains how to configure security for the Oracle Revenue Management and Billing application using the default security features.
<i>ORMB - Transaction Feed Management - Batch Execution Guide</i>	Describes the sequence in which the batches must be executed while performing various tasks in the Transaction Feed Management module.
<i>Oracle Revenue Management and Billing Batch Guide</i>	Lists and describes various ORMB batches.
<i>Oracle Revenue Management and Billing Upgrade Guide</i>	Explains how to upgrade the Oracle Revenue Management and Billing framework, application, and its database.
<i>Oracle Revenue Management and Billing Upgrade Path Guide</i>	Explains the path and pre-requisites for upgrading Oracle Revenue Management and Billing from one version to another.
<i>Oracle Revenue Management and Billing ODI Integration Guide for TFM</i>	Explains how to install the ODI artifacts for TFM. It also explains how to upload and import the transaction data from a flat file to various tables in the target database.
<i>Oracle Revenue Management and Billing Documaker Integration Guide for Banking</i>	Provides detailed information on how to integrate Oracle Documaker with Oracle Revenue Management and Billing so that you can use Oracle Documaker for the Banking module.
<i>Oracle Revenue Management and Billing Reports Installation Guide</i>	Explains how to install reports in Oracle BI Publisher and ORMB. It also explains how to create new reports from scratch or using the sample report as a starting point.
<i>Oracle Revenue Management and Billing Pricing Services</i>	Lists and describes the inbound web services related to the Pricing module. It also explains the pre-requisites, input parameters, and output parameters of these inbound web services.

Change Log

Revision	Last Update	Updated Section	Comments
1.1	01-Jun-2017	User Interface (UI) Level Changes	Added Information
		Known Issues	Added Known Issues
		Technical Recommendations	Corrected Information
1.2	08-Jun-2017	Transaction Feed Management	Added Section
		User Interface (UI) Level Changes	Added Information
		Known Issues	Added Known Issue
		Payment Distribution	Made Correction
1.3	15-May-2020	Deprecation Notices for ORMB Version 2.6.0.0.0	Updated Information

Contents

Prerequisites	1
New Features (Generic).....	2
Effective Dated Address.....	2
Deal Management.....	3
Payment Agreement Request	4
New Features (Specific to Financial Services)	7
Customer 360-Degree View	7
Accruals	8
Dispute Request.....	12
Earnings Credit Rate.....	16
New Features (Specific to Insurance)	21
Customer 360-Degree View	21
Reinstatement Upload Request.....	22
Inbound Message.....	23
Upload Lockbox Payment and Remittance Advices.....	25
Billing.....	27
Enhancements	28
Person Information	28
Statement Construct.....	28
Policy	29
Payment Distribution	30
Pricing.....	31
Transaction Feed Management	31
User Interface (UI) Level Changes	33
Database Level Changes	46
Supported Platforms.....	47
Framework Upgrade	48
Oracle Utilities Application Framework Version 4.3.0.4.0 Enhancements.....	49
System Wide Enhancements.....	49
Configuration Tool Enhancements.....	52
Batch Processing Enhancements	54
Integration Enhancements.....	56
Configuration Migration Assistant (CMA) Enhancements	57

Miscellaneous Enhancements.....	62
System Data Enhancements	62
Technical Recommendations	68
Supported Upgrades	69
Deprecated Notices for OUAF Version 4.3.0.4.0	70
Deprecated Functionality in This Release	70
Deprecation Planned for Future Releases	70
Deprecated Objects for Future Releases	72
Deprecation Notices for ORMB Version 2.6.0.0.0	73
Deprecated Functionality in This Release	73
Deprecation Planned for Future Releases	73
Product Documentation	75
Media Pack Download	76
Bug Fixes	77
Known Issues	79
Banking.....	79
Insurance.....	117
Documentation	120
Technical Support	123

Prerequisites

If a customer is already using the Transaction Feed Management feature and wants to upgrade to Oracle Revenue Management and Billing Version 2.6.0.0.0, then the customer needs to ensure the following (before upgrading):

- All bills generated in the system are in the **Complete** status. In other words, there should not be any bills in the **Pending** status. If there are any bills in the **Pending** status or if any billable charge (generated through TFM) is not yet billed, disaggregation and cancellation of transactions which are uploaded using 2.5.0.4.0 will not happen successfully.
- Transactions which are uploaded using 2.5.0.4.0 must not be in the **Initial Product Determined (INPD)** status. They can be in the **Uploaded (UPLD)**, **Invalid (INVL)**, **Error (EROR)**, **Completed (COMP)**, or **Cancelled (CNCL)** status.
- Equal to (=) or tilde (~) symbol is not used in any existing price item parameter code or value. Otherwise, erroneous results might occur.

New Features (Generic)

This section describes the following new features added in this release which can be used in both financial services and insurance domains:

- Effective Dated Address
- Deal Management
- Payment Agreement Request

Effective Dated Address

Until now, you were able to define the following types of address in the application:

Type of Address	Purpose
Person Mailing	This address is used to send the bills, letters, quotes, and statements to a person.
Person Seasonal	This address is used only when the person wants to send their correspondence to an alternate address for a predefined period.
Account Override	This address is used when the person wants to send the account-specific correspondence to an override address instead of the person's mailing or seasonal address.

Oracle Revenue Management and Billing, now, provides the ability to define effective dated address for various entities, such as person, account, or adjustment. For example, for a person P1, you can define two mailing addresses (A1 and A2) — A1 is effective from Jan 2017 and A2 is effective from Jan 2018. Accordingly, all correspondence of the person P1 from Jan 2017 to Dec 2017 will be sent to the address A1 and all correspondence of the person P1 from Jan 2018 onwards will be sent to the address A2. A new screen named **Address** is introduced to define an address using various address types and associate the address with an entity from a particular date. You can associate an address to multiple entities at the same time. Only one address can be effective for an entity for a particular date range. At present, you cannot define, edit, or delete the following types of address from the **Address** screen:

- Person Mailing
- Person Seasonal
- Account Override

However, you can define, edit, or delete any custom type of address from the **Address** screen. You can optionally configure the system to use the approval workflow process whenever an address is defined, edited, or deleted from the **Address** screen. If the approval workflow process is configured for the **C1-Address** business object, the approval workflow request is created while defining, editing, copying, or deleting an address. Once the approver approves the approval workflow request, the changes are reflected in the system.

Through the **Address** screen, you can navigate to the **Address Information** screen, which allows you to:

- View the details of an address, including the characteristics defined for the address and entities associated with the address
- Edit, delete, and copy an address
- View the log of an address
- Add a log entry for an address

Deal Management

A deal management system can use the following two inbound web services shipped in this release:

Inbound Web Service	Description
C1-Prospect	<p>This inbound web service is used for adding the prospect (person) and pricing information in ORMB. It enables you to:</p> <ul style="list-style-type: none"> • Create a person and price list • Assign the price list to the person • Assign a price item to the person or price list. • Create a rate schedule, rate version, and rate component. <p>It does not allow you to update or read information from the system. The deal management information is mandatory when you create a person through this inbound web service.</p>
C1-DealPricing	<p>This inbound web service is used for adding and updating the pricing information in ORMB. It can also be used for reading the pricing information from ORMB. It enables you to:</p> <ul style="list-style-type: none"> • Add deal information for a person • Create a price list and assign the price list to a person or account • Assign a price item to a person, account, or price list • Create a rate schedule, rate version, and rate component • Edit a price list • Edit a price list assignment of a person or account • Edit a price item pricing assigned to a person, account, or price list • Retrieve the price list and rate schedule information • Retrieve the price list assignment information • Retrieve the price assignment information • Retrieve all customer agreed and price list price assignments for a person • Retrieve all account agreed and price list price assignments for an account

Inbound Web Service	Description
	<p>You can also expire the following through this inbound web service:</p> <ul style="list-style-type: none"> • Price list pricing • Account and customer agreed pricing • Price list assignment on a person and account

Payment Agreement Request

Oracle Revenue Management and Billing provides the ability to schedule payments in instalments for a set of unpaid bills of an account through a payment agreement request. Let us understand this with the help of an example. The following bills of the account A1 are unpaid:

- B1 (Bill Amount – 100\$, Unpaid Amount - 75\$)
- B2 (Bill Amount – 250\$, Unpaid Amount – 125\$)
- B3 (Bill Amount – 150\$, Unpaid Amount – 150\$)

Through a payment agreement request, you can schedule payments for these three bills in various instalments. For example, you can schedule the following payments for the account A1:

Schedule Date	Schedule Amount
01-Jan-2017	100
15-Jan-2017	100
01-Feb-2017	100
15-Feb-2017	50

While creating a payment agreement request, you need to specify the payment agreement request type using which you want to create the payment agreement request. It is the payment agreement request type which helps the system to determine:

- The business object using which the payment agreement request should be created
- Whether the approval is required for the payment agreement request

You can only add completed bills of the account which are unpaid in a payment agreement request. Once a payment agreement request is created for an account, the status of the payment agreement request is set to **Draft**. You can then edit or delete the payment agreement request, if required. Once you add the unpaid bills of the account, you can submit the payment agreement request. On submitting a payment agreement request, the status of the payment agreement request is set to **Active**.

You can optionally configure the system to use the approval workflow process for a payment agreement request. If the **Approval Required** flag is set to **Yes** in a payment agreement request type, then on submitting the respective payment agreement request, the approval workflow process creates a To Do for the approver to review the payment agreement request. Once the approver approves the payment agreement request, the status of the payment agreement request is set to **Active**. The approver can

approve, reject, or resubmit the payment agreement request. When the payment agreement request is resubmitted to the submitter, the status of the payment agreement request is set to **Draft**.

Even if the approval workflow is configured for a payment agreement request type, you can skip the approval workflow for a payment agreement request. The system enables you to skip the approval workflow for a payment agreement request until you exceed the maximum limit defined in the **C1-PA-SUBMIT** algorithm. You can define the following parameters in the **C1-PA-SUBMIT** algorithm:

- Number of days to consider in past to check whether any payment agreement request with a particular status exist in the specified duration (for example, 365)
- Maximum number of payment agreement requests which can be activated without approval (for example, 1)
- Status in which payment agreement request should exist in the specified duration (for example, Broken Promise)

In the above example, on clicking the **Submit** button, the system will check how many payment agreement requests for the account in the last 365 days exist in the **Broken Promise** status. If the system finds one or more than one payment agreement requests in the **Broken Promise** status in the last 365 days, the approval workflow process creates a To Do for the approver to review the payment agreement request. However, if the system does not find any payment agreement request in the **Broken Promise** status in the last 365 days, the payment agreement request is not sent for approval and the status of the payment agreement request is directly changed to **Active**.

When the **Payment Agreement Request Periodic Monitor (C1-PAREQ)** batch is invoked, the system checks whether there are any payment agreement requests in the **Active** status. If there is a payment agreement request in the **Active** status, the system checks whether the total unpaid amount of the bills is equal to zero and whether each bill is fully matched. If so, the status of the payment agreement request is changed to **Kept Promise**. However, if the total unpaid amount of the bills is not equal to zero, the system checks whether the current date is later than the schedule date and does not fall within the grace period. If so, the system checks whether total unpaid amount is greater than the total future schedule amount. If so, the status of the payment agreement request is changed to **Broken Promise**. However, if the current date is earlier than the schedule date or falls within the grace period, or the total unpaid amount is less than the total future schedule amount, the status of payment agreement request remains in **Active**. The system enables you to edit a payment agreement request which is in the **Active** status.

While defining a payment agreement request, you need to specify the payment method through which the payment will be done and whether the payment will be done through the payor or third party payor account. If the **Auto Pay** flag is set to **Yes** for a payment method, you need to also specify the automatic payment option using which the automatic payment should be created on the schedule date. One more batch named **Generate Auto Pay for Payment Agreement (C1-APPAB)** is introduced in this release. When the **Generate Auto Pay for Payment Agreement (C1-APPAB)** batch is invoked, the system checks whether there are any payment agreement requests in the **Active** status. If so, whether the account for which the payment agreement request is created is eligible for automatic payment and the defer auto pay date (if any) defined for the account is earlier than the batch business date. If so, the system checks whether the extract date of the unpaid bill (with the earliest due date) is earlier than the schedule date.

If so, the system creates the automatic payment for the unpaid bill on the schedule date. However, if the account is not eligible for automatic payment, or the defer auto pay date is equal to or later than batch business date, or the extract date is equal to or later than the schedule date, the automatic payment is not generated for the account.

New Features (Specific to Financial Services)

This section describes the following new features added in this release which can be used in the financial services domain:

- Customer 360-Degree View
- Accruals
- Dispute Request
- Earnings Credit Rate

Customer 360-Degree View

Oracle Revenue Management and Billing provides you with the ability to quickly view in-depth information about the person by aggregating data from the application and presenting the same on one screen named **Customer 360-Degree View**. This data can then be easily used for analysis. You can use the person or account details to search and view the 360-degree information of the person, such as:

- Basic details, characteristics, linked accounts, legal hierarchy, and the customer contacts of a person
- Basic details, characteristics, linked persons, automatic payment options, billing history, payment history, dispute details, hold details, and overdue process details of the person's account

In addition, it displays the following information in a graphically presentation:

- Number of regular bills created for the account in a particular month
- Number of adhoc bills created for the account in a particular month
- Number of payments made for the account in a particular month
- Number of dispute requests created against the account in a particular month
- Number of processes which are on hold for the account in a particular month

For each unpaid bill of the account, you can view the following:

- Basic details of the bill
- Activities (such as, payment, offset, refund, or write off) through which the bill is settled
- Details about the bill line items, such as bill segments and adjustments
- Active hold requests due to which the bill is kept on hold
- Offset requests through which the bill is offset against another bill
- Refund and write off requests through which the bill or its bill segment is either refunded or written off
- Dispute requests through which a dispute is raised against the bill or its bill segment

In other words, this feature allows you to drill down to see or act on all current and historical revenue management and billing details. This allows you to professionally and efficiently handle customer inquiries and complaints at the first point of contact, raising your customer service from previously unattainable levels and reducing the associated time and cost.

Through the **Customer 360-Degree View** screen, you can navigate to various screens in the application, such as:

- Customer 360-Degree Information
- Bill Information
- Pricing (Account)
- Pricing (Person)
- Price List Assignment: (Account)
- Price List Assignment (Person)

We strongly recommend you to use the **Customer 360-Degree View** screen instead of the **Banking Control Central** screen because it will be deprecated in a future release.

Accruals

Oracle Revenue Management and Billing enables you to calculate and create accrual for accounts. The accrual is an adjustment which is created for the following:

- Revenues that have been earned but are not yet recorded in the books of accounts
- Expenses that have been incurred but are not yet recorded in the book of accounts

The system also enables you to reverse the accrual for accounts. You need to define whether the accounts belonging to a division are eligible for accrual or not. If a division is eligible for accrual, by default, all accounts belonging to the division are eligible for accrual. However, you can exclude an account from accrual, if required.

To enable the accruals feature, you need to define the following:

- **Accrual Cycle** – You must specify the following information in the accrual cycle:
 - Dates when accrual should be calculated and created for the accounts where the accrual cycle is defined
 - Accrual reversal period for each accrual date

If a division is eligible for accrual, you need to specify the accrual cycle for the division. By default, all accounts belonging to a division will inherit the accrual cycle of the division. However, you can override the accrual cycle of an account.

- **Accrual Type** – You must specify the following information in the accrual type:
 - Type of the accrual object that you want to create for posting the accrual amount. At present, the product enables you to create adjustments to record accruals for accounts in the system.

- Whether you want to calculate the accrual based on the historical or actual data. If you want to calculate the accrual based on the historical data, you need to specify the number of historical bills that you want to consider for accrual calculation. The system will only consider the completed historical bills during accrual calculation. Besides specifying the historical bill count, you also need to specify the type of day (i.e. Business Day or Calendar Day) which is used to calculate the accrual amount. However, if you want to calculate the accrual based on the actual data, you need to specify whether trial bill or unbilled pass through billable charges created through the Transaction Feed Management process should be considered to calculate the accrual amount.
- Whether you want to calculate accrual at the bill or bill segment level.
- Cancel reason that you want to use while reversing the accrual.
- Algorithms that you want to use during the accrual calculation, creation, and reversal.
- Whether any objects, such as adjustments created using a particular adjustment type, bill segments created for a particular price item, or adjustments' or bill segments' financial transactions where a particular distribution code is used, must be excluded during the accrual calculation.
- Divisions to which you want to associate the accrual type

The following table indicates how the accrual amount is calculated:

Accrual Criteria	Historical Bill Count	Accrual Source	Posting Method	Accrual Calculation
Historical	2	-	Bill Level	The system considers the last two completed bills for the accrual calculation. The accrual amount is the average of bill segments and frozen adjustments on the last two bills. If the Type of Day is set to Business Day, the system does not consider the weekends and holidays during the accrual calculation. However, if the Type of Day is set to Calendar Day, the system considers the weekends and holidays during the accrual calculation.

Accrual Criteria	Historical Bill Count	Accrual Source	Posting Method	Accrual Calculation
Historical	2	-	Bill Segment Level	The system considers the last two completed bills for the accrual calculation. The accrual amount is the average of bill segments on the last two bills. If the Type of Day is set to Business Day, the system does not consider the weekends and holidays during the accrual calculation. However, if the Type of Day is set to Calendar Day, the system considers the weekends and holidays during the accrual calculation.
Actual	-	Transaction Feed	Bill Level	The accrual amount is the sum of unbilled pass through billable charges created for the account either manually or automatically through the Transaction Feed Management process and frozen adjustments of the account.
Actual	-	Transaction Feed	Bill Segment Level	The accrual amount is the sum of unbilled pass through billable charges created for the account automatically through the Transaction Feed Management process.
Actual	-	Trial Bill	Bill Level	The accrual amount is the sum of bill segments and frozen adjustments on the latest trial bill.
Actual	-	Trial Bill	Bill Segment Level	The accrual amount is the sum of bill segments on the latest trial bill.

The accrual process includes the following two sub-processes:

- **Accrual Calculation** – You can calculate the accrual amount through the **C1_ACCAL** batch process. It considers the batch business date as the accrual date and finds the accrual cycle within which the accrual date is present. Once the accrual cycle is identified, the batch finds all accounts where the accrual cycle is defined and calculates the accrual amount for those accounts. Before calculating the accrual amount, the system checks whether the account is a member of an invoicing group or whether the account is included in an active construct. If the account is a member of an invoicing group or included in an active construct, the account is not considered for accrual calculation. If the account is neither a member of an invoicing group nor included in an active construct, the batch identifies the accrual type which is effective for the division (to which the account belongs) on the batch business date. Based on the options defined in the accrual type, the system accordingly calculates the accrual amount. If the approval is required for an accrual, the status of the accrual is changed to **Approval in Progress**. However, if the approval is not required for an accrual, the status of the accrual is changed to **Ready for Accrual**. If required, you can edit the accrual amount when the accrual is in the **Ready for Accrual** status.
- **Accrual Creation** – You can create the adjustments for accruals through the **C1_ACCRE** batch process. The accruals which are either in the **Ready for Accrual** or **Processed** status are considered in this batch process. Based on the adjustment type defined in the accrual type, the system accordingly creates the accrual adjustment for the account. The status of the accrual is changed to **Accrued**.

You can reverse the accrual through the **C1_ACREV** batch process. On reversing the accrual, the accrual adjustments are cancelled. The status of the accrual is changed to **Reversed**.

The system also enables you to manually create the accrual for an account. You can optionally configure the approval workflow process for accruals. The approval process is configured through the approval profile. The approval profile allows you to define the approval hierarchy. The debit approval hierarchy is used for approving the accrual. You can define an approval hierarchy where users with different To Do role at each level can approve or reject the accrual. This process continues till the approval is received from all levels in the hierarchy. Once users at all levels approve the accrual, the status of the accrual is changed to **Processed**. However, if an approver at any level in the hierarchy rejects the accrual, the status of the accrual is changed to **Rejected**.

One more batch named **C1_ACELG** is shipped in this release. This batch creates a To Do for all such accounts which are eligible for accrual, but the accrual cycle is not defined either at the account or division level.

Dispute Request

Oracle Revenue Management and Billing allows you to create a dispute request for an account. Through a dispute request, the dispute against a particular bill, bill segment, and/or adjustment is tracked and closed. While creating a dispute request, you need to specify the dispute request type using which you want to create the dispute request. It is the dispute request type which helps the system to determine:

- The business object using which the dispute request should be created
- Whether the dispute request must be approved before creating adjustments to settle a dispute against a bill, bill segment, or adjustment
- Approval profile using which the dispute request must be approved
- Whether multi-level or single-level approval is required for a dispute request
- Whether debit or credit hierarchy must be used for approval when the dispute request amount is zero
- Default adjustment type using which adjustments must be created

You can add completed bills, its bill segments, and adjustments in the dispute request. In other words, at present, the system enables you to resolve the dispute against a bill, bill segment, and adjustment. If the dispute is against a bill, the system, by default, sets the dispute amount and does not allow you to change the dispute amount. The dispute amount is set to the original bill amount because the original bill amount and dispute amount must be equal. However, if the original bill amount is positive, then the dispute amount is set to negative, and vice versa. If the dispute is against a bill segment or adjustment, you can change the dispute amount, if required.

Once a dispute request is created, the status of the dispute request is set to **Draft**. You can then edit or delete the dispute request, if required. Once you add the bills, bill segments, or adjustments in a dispute request, you can submit the dispute request. On submitting a dispute request, the system behaves in the following manner:

Dispute Against	Type of Bill	Stop Auto Pay (Yes or No)	Behavior
Bill	Fully Paid	Not applicable	The system does the following: <ol style="list-style-type: none"> 1. Creates the adjustment using the specified adjustment type for the bill. 2. Swaps the adjustment onto the next bill.

Dispute Against	Type of Bill	Stop Auto Pay (Yes or No)	Behavior
Bill	Unpaid	Yes	<p>The system does the following:</p> <ol style="list-style-type: none"> 1. Stops the automatic payment created for the current bill. 2. A characteristic is defined on the current bill indicating the date till when the bill should not be considered by the Overdue Monitor (C1-ADMOV) batch. <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>Note: The above step (2) occurs only when the approval is required for the dispute request.</p> </div> <ol style="list-style-type: none"> 3. Reopens the current bill of the account. 4. Creates the adjustment using the specified adjustment type for the bill and swaps the adjustment onto the current bill. 5. Completes and freeze the current bill.
Bill	Unpaid	No	<p>The system does the following:</p> <ol style="list-style-type: none"> 1. Creates the adjustment using the specified adjustment type for the bill. 2. Swaps the adjustment onto the current or next bill depending on the value defined for the Adjustment on Next Bill parameter in an algorithm created using the C1-ENTERADJ algorithm type.
Bill	Partially Paid	Not applicable	<p>The system does the following:</p> <ol style="list-style-type: none"> 1. Creates two adjustments using the specified adjustment type for the bill. 2. Swaps one adjustment onto the current bill and another adjustment onto the next bill. <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>Example: A dispute is raised against a bill (Bill Amount – 100, Dispute Amount – 100, and Unpaid Amount - 50), then one adjustment (with the adjustment amount 50) is swap on the current bill and another adjustment (with the adjustment amount 50) is swap on the next bill.</p> </div>
Bill Segment	Fully Paid	Not applicable	<p>The system does the following:</p> <ol style="list-style-type: none"> 1. Creates the adjustment using the specified adjustment type for the bill segment. 2. Swaps the adjustment onto the next bill.

Dispute Against	Type of Bill	Stop Auto Pay (Yes or No)	Behavior
Bill Segment	Unpaid	Yes	<p>The system does the following:</p> <ol style="list-style-type: none"> 1. Stops the automatic payment created for the current bill. 2. A characteristic is defined on the current bill indicating the date till when the bill should not be considered by the Overdue Monitor (C1-ADMOV) batch. <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>Note: The above step (2) occurs only when the approval is required for the dispute request.</p> </div> <ol style="list-style-type: none"> 3. Reopens the current bill of the account. 4. Creates the adjustment using the specified adjustment type for the bill segment and swaps the adjustment onto the current bill. 5. Completes and freeze the current bill.
Bill Segment	Unpaid	No	<p>The system does the following:</p> <ol style="list-style-type: none"> 1. Creates the adjustment using the specified adjustment type for the bill segment. 2. Swaps the adjustment onto the current or next bill depending on the value defined for the Adjustment on Next Bill parameter in an algorithm created using the C1-ENTERADJ algorithm type.
Bill Segment	Partially Paid	Not applicable	<p>The system does the following:</p> <ol style="list-style-type: none"> 1. Creates two adjustments using the specified adjustment type for the bill segment. 2. Swaps one adjustment onto the current bill and another adjustment onto the next bill. <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>Example: A dispute is raised against a bill segment (Bill Segment Amount – 100, Dispute Amount – 100, and Unpaid Bill Segment Amount - 50), then one adjustment (with the adjustment amount 50) is swap on the current bill and another adjustment (with the adjustment amount 50) is swap on the next bill.</p> </div>

Dispute Against	Type of Bill	Stop Auto Pay (Yes or No)	Behavior
Adjustment	Fully Paid	Not applicable	<p>The system does the following:</p> <ol style="list-style-type: none"> 1. Creates the adjustment using the specified adjustment type for the adjustment (against which you have raised a dispute). 2. Swaps the adjustment onto the next bill.
Adjustment	Unpaid	Yes	<p>The system does the following:</p> <ol style="list-style-type: none"> 1. Stops the automatic payment created for the current bill. 2. A characteristic is defined on the current bill indicating the date till when the bill should not be considered by the Overdue Monitor (C1-ADMOV) batch. <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>Note: The above step (2) occurs only when the approval is required for the dispute request.</p> </div> <ol style="list-style-type: none"> 3. Reopens the current bill of the account. 4. Creates the adjustment using the specified adjustment type for the adjustment (against which you have raised a dispute) and swaps the adjustment onto the current bill. 5. Completes and freeze the current bill.
Adjustment	Unpaid	No	<p>The system does the following:</p> <ol style="list-style-type: none"> 1. Creates the adjustment using the specified adjustment type for the adjustment (against which you have raised a dispute). 2. Swaps the adjustment onto the current or next bill depending on the value defined for the Adjustment on Next Bill parameter in an algorithm created using the C1-ENTERADJ algorithm type.

Dispute Against	Type of Bill	Stop Auto Pay (Yes or No)	Behavior
Adjustment	Partially Paid	Not applicable	<p>The system does the following:</p> <ol style="list-style-type: none"> 1. Creates two adjustments using the specified adjustment type for the adjustment (against which you have raised a dispute). 2. Swaps one adjustment onto the current bill and another adjustment onto the next bill. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Example: A dispute is raised against an adjustment (Adjustment Amount – 100, Dispute Amount – 100, and Unpaid Adjustment Amount - 50), then one adjustment (with the adjustment amount 50) is swap on the current bill and another adjustment (with the adjustment amount 50) is swap on the next bill.</p> </div>

Finally, the status of the dispute request is changed to **Processed**. You can optionally configure the system to use the approval workflow process for a dispute request. If the **Approval Required** flag is set to **Yes** in a dispute request type, then on submitting the respective dispute request, the approval workflow process creates a To Do for the approver to review the dispute request. Once the approver approves the dispute request, the system behaves as mentioned in the above table. The approver can approve, reject, or resubmit the dispute request. When the dispute request is resubmitted to the submitter, the submitter can edit, cancel, or submit the dispute request.

The approval process is configured through the approval profile. The approval profile allows you to define the debit and credit hierarchy. If the dispute request amount is negative, the credit hierarchy in the approval profile is used for approval. However, if the dispute request amount is positive, the debit hierarchy in the approval profile is used for approval. You can either opt to use single-level or multi-level approval for the dispute requests.

Earnings Credit Rate

Oracle Revenue Management and Billing enables you to generate the earnings credit rate (ECR) when the account is eligible for earnings credit rate and is associated with a contract of a contract type where the **Financial Transaction Distribution Object** characteristic is defined. In other words, the system enables you to create the financial transaction distribution (ECR) object when the adjustment and/or bill segment financial transaction created against an ECR contract is frozen. The status of the financial transaction distribution object is set to **Pending**.

To enable the Earnings Credit Rate (ECR) feature, you need to setup the following:

- **Financial Transaction Distribution Type** – A financial transaction distribution type is an object which controls the distribution of a credit and debit bill segment or adjustment financial transaction. It is associated to a contract type through a financial transaction distribution object. It helps the system to determine:
 - Whether it is defined for adjustment or bill segment financial transactions whose credit or debit amount should be distributed.
 - The type of adjustment (such as transfer adjustment) should be created when the credit or debit amount on the financial transaction distribution object is distributed.
 - The financial transaction distribution rule using which the credit or debit amount on the financial transaction distribution object should be distributed.
 - Whether the credit or debit amount on the financial transaction distribution object should be used to offset an adjustment or bill segment of the same account (where ECR is earned), another account of the customer (for whom ECR is earned), or the account identified as per the distribution hierarchy.
 - Whether the credit or debit amount on the financial transaction distribution object should be written off when it is equal to or less than the write off threshold amount.
 - The type of adjustment that should be created when the credit or debit amount on the financial transaction distribution object is written off.
 - The type of adjustment that should be created when the credit or debit amount on the financial transaction distribution object is expired.
 - The type of adjustment that should be created when the excess credit amount on the financial transaction distribution object is refunded at the end of the year.
 - The business object using which the financial transaction distribution object should be created.
- **Financial Transaction Distribution Rule** – A financial transaction distribution rule is associated with one or more financial transaction distribution types. It helps the system to determine:
 - The method using which the credit or debit amount on the financial transaction distribution object should be distributed. If the distribution method is set to **Fee Based**, the system will distribute the credit or debit amount on the financial transaction distribution object to offset fees starting from the highest to lowest amount. If the distribution method is set to **Priority Based**, the system will distribute the credit or debit amount on the financial transaction distribution object to the accounts in the order of their account distribution priority. If the distribution method is set to **Weighted Average**, the system will distribute the credit or debit amount on the financial transaction distribution object to the accounts in the weighted average ratio.
 - The distribution hierarchy using which the accounts, to which the credit or debit amount on the financial transaction distribution object should be distributed, should be derived.

- The priority in which the objects, such as adjustments of a particular adjustment type or bill segments created for a particular price item, should be offset using the credit or debit amount on the financial transaction distribution object.
- The objects, such as adjustments of a particular adjustment type or bill segments created for a particular price item, should be excluded from offsetting.
- Algorithms that should be used to select the accounts, interpret the order of distribution, and then distribute the credit or debit amount.
- **Expiration Cycle** – An expiration cycle is an extendable lookup reference object which indicates the frequency at which the financial transaction distribution object created for the account should be expired (i.e. after two months or 45 days from the date of creation). You can associate an expiration cycle with one or more accounts.
- **Distribution Hierarchy** – A distribution hierarchy is an extendable lookup reference object which indicates the list of hierarchies that should be considered while deriving accounts for offsetting the credit or debit amount on the financial transaction distribution object. The valid hierarchy lists are:
 - **IGA Member Accounts Same Division** – If this option is selected, the system will first offset the credit or debit amount on the financial transaction distribution object against the source account, other accounts of the source customer, and then against other member accounts of an invoicing group in which the source account is also a member account.
 - **Person Relationship (Child) Same Division** - If this option is selected, the system will first offset the credit or debit amount on the financial transaction distribution object against the source account, other accounts of the source customer, and then against the child persons' accounts who are related to the parent person (i.e. source customer) using a particular relationship type and belongs to the same division.
 - **Person Relationship (Child) Other Division** - If this option is selected, the system will first offset the credit or debit amount on the financial transaction distribution object against the source account, other accounts of the source customer, and then against the child persons' accounts who are related to the parent person (i.e. source customer) using a particular relationship type and belongs to a different division.
 - **Person Relationship (Parent) Same Division** - If this option is selected, the system will first offset the credit or debit amount on the financial transaction distribution object against the source account, other accounts of the source customer, and then against the parent persons' accounts who are related to the child person (i.e. source customer) using a particular relationship type and belongs to the same division.
 - **Person Relationship (Parent) Other Division** - If this option is selected, the system will first offset the credit or debit amount on the financial transaction distribution object against the source account, other accounts of the source customer, and then against the parent persons' accounts who are related to the child person (i.e. source customer) using a particular relationship type and belongs to a different division.

You can associate a distribution hierarchy with one or more financial transaction distribution rules.

- **Financial Transaction Distribution Object** – A financial transaction distribution type is associated to a contract type through a financial transaction distribution object. You can include multiple financial transaction distribution types in a financial transaction distribution object. You can associate a financial transaction distribution object to one or more contract types.
- **Earnings Credit Rate Eligibility** – You can define earnings credit rate eligibility for each account in the system. It helps the system to determine:
 - Whether the account is eligible for generating earnings credit rate (i.e. financial transaction distribution object)
 - Whether the credit or debit amount on the financial transaction distribution object can be offset against the source account, other accounts of the source customer, or against the accounts identified in the distribution hierarchy.
 - The priority in which the account should be considered while distributing the credit or debit amount on the financial transaction distribution object.
 - The expiration cycle for the account.

The following two batches are introduced in this release:

- **Financial Transaction Distribution Monitor (C1-FTDPR)** – It is used to monitor or check whether there are any financial transaction distribution objects in the **Pending** status. If there is a financial transaction distribution object in the **Pending** status, the system validates the financial transaction distribution object and changes the status of the financial transaction distribution object to **Validated**. From the **Validated** status, the status of the financial transaction distribution object is changed to either of the following:
 - **Refund** (when there is excess credit amount on the financial transaction distribution object at the end of the year and the source account belongs to a particular customer class where refund is allowed)
 - **Write Off** (when the credit or debit amount on the financial transaction distribution object is equal to or less than the write off threshold amount)
 - **Expire** (when the credit or debit amount on the financial transaction distribution object is expired)

Accordingly, the refund, write off, and expire adjustments are created. However, if none of the above conditions are met, the status of the financial transaction distribution object remains as **Validated**.

- **FT Distribution Single Threaded Transition Batch (C1-FTDTS)** - It is used to monitor or check whether there are any financial transaction distribution objects in the **Validated** status. If there is a financial transaction distribution object in the **Validated** status, the system changes the status of the financial transaction distribution object to **Apply Rule** and executes the algorithm attached to the **Apply Rule** system event on the financial transaction distribution rule version which is effective on the batch business date. Once the credit or debit distribution array of accounts is created, the status of the financial transaction distribution object is changed to **Distributed** and then the algorithm attached to the **Distribute** system event on the financial

transaction distribution rule version which is effective on the batch business date is executed. On the credit or debit amount distribution, two adjustments are created – one against the source contract and another against the bill segment or adjustment’s contract to which the amount is distributed. Once the credit or debit amount on the financial transaction distribution object is fully distributed, the status of the financial transaction distribution object is changed to **Complete**. However, if the credit or debit amount on the financial transaction distribution object is not yet fully distributed, the status of the financial transaction distribution object is changed to **Validated**.

To implement the Earnings Credit Rate (ECR) feature, the following new screens are introduced in this release:

- **Financial Transaction Distribution Type** – Enables you to add, edit, copy, or delete a financial transaction distribution type.
- **Financial Transaction Distribution Rule** – Enables you to add, edit, copy, or delete a financial transaction distribution rule.
- **Earnings Credit Rate Eligibility** – Enables you to define earnings credit rate eligibility for an account.
- **Financial Transaction Distribution** – Enables you to search and view the details of a financial transaction distribution object.

New Features (Specific to Insurance)

This section describes the following new features added in this release which can be used in the insurance domain:

- Customer 360-Degree View
- Reinstatement Upload Request
- Inbound Message
- Upload Lockbox Payment and Remittance Advices
- Billing

Customer 360-Degree View

Oracle Revenue Management and Billing provides you with the ability to quickly view in-depth information about the person by aggregating data from the application and presenting the same on one screen named **Customer 360-Degree View**. This data can then be easily used for analysis. You can use the person, account, or policy details to search and view the 360-degree information of the person, such as:

- Basic details, characteristics, child persons, hierarchy, and the customer contacts of a person
- Basic details, characteristics, administrative contracts, automatic payment options, billing and adjustment summary, financial and collections summary, and unpaid bills of the person's account
- Consolidated view of the transactions (such as, billing, payment, payment cancellation, adjustment, adjustment cancellation, automatic payments sent to the auto clearing house for review, refund, write off, and excess credit) which are carried out for the person's account
- Basic details of the policy where the person is either policy holder or main subscriber in the policy membership
- Related persons and policy plans in the policy, and package savings offered in the policy plan

In addition, it displays the following information in a graphically presentation:

- Number of customer contacts created for the account's main customer in a particular month
- Number of bills created for the account in a particular month
- Number of payments created for the account in a particular month

For each unpaid bill of the account, you can view the following:

- Basic details of the bill
- Adjustments which are swept onto the bill
- Activities (such as, payment, offset, refund, or write off) through which the bill is settled
- High level summary and details of the bill segments included the bill
- Active hold requests due to which the bill is kept on hold
- Offset requests through which the bill is offset against another bill

- Refund and write off requests through which the bill or its bill segment is either refunded or written off

In other words, this feature allows you to drill down to see or act on all current and historical revenue management and billing details. This allows you to professionally and efficiently handle customer inquiries and complaints at the first point of contact, raising your customer service from previously unattainable levels and reducing the associated time and cost.

Through the **Customer 360-Degree View** screen, you can navigate to various screens in the application, such as:

- Customer 360-Degree Information
- Bill Information
- Pricing (Account)
- Pricing (Person)
- Price List Assignment: (Account)
- Price List Assignment (Person)

Reinstatement Upload Request

Using the **Upload Request** feature, you can upload the data to initiate the reinstatement process for multiple policies at the same time. You can upload a data file in the CSV format. You need to ensure that the CSV file is in the required format; otherwise the file will not be uploaded.

When you upload a data file, the system parses the flat file in the CSV format and maps the columns in the CSV file to an XML schema. An upload request of the specified upload request type is created when the file is successfully uploaded in the system. You can track a file through an upload request.

Once an upload request is created, the status of the upload request is set to **Draft**. The status of each record uploaded through an upload request is set to **Pending**. You can then edit, delete, or validate the upload request. During the validation process, the system and custom validations (if any) are executed. The status of each record is changed to **Valid** or **Invalid** depending on whether the record was validated successfully or not. If the mandatory data (i.e. reinstatement reason) is not available or data required for deriving policy ID (i.e. policy number or source system) is incorrect in the record, the status of record is set to **Invalid**.

Once the upload request is validated, you can either cancel or submit the upload request for further processing. On submitting an upload request, the system checks whether the number of valid records in the uploaded file exceed the online record process limit defined in the Defer Upload Request algorithm. If the number of valid records in the uploaded file does not exceed the online record process limit, the system updates the policies in the real time (i.e. immediately changes the status of the policy to **Pending Reinstatement** and creates the required outbound message for the policy enrolment system). However, if the number of valid records in the uploaded file exceeds the online record process limit, the system updates the policies in the deferred mode (i.e. when the **Upload Request Periodic Monitor (C1-UPLRQ)** batch is invoked).

You can optionally configure the system to use the approval workflow process for a reinstatement upload request. The **Reinstatement Upload Request (C1-ReinstatementUploadRequest)** business object is shipped in this release.

Inbound Message

Oracle Revenue Management and Billing enables you to create an inbound message using an inbound message type through the following inbound web services:

- **C1-CustomerStructureInboundMessage** – Enables you to add or update a person, account, contract, policy, policy plan, packaged savings, and billable charge. It also allows you to terminate, reinstate, or renew a policy. In addition, it allows you to hold an account for a given time period. However, only the bill generation process is kept on hold when the hold request for an account is created through an inbound message.
- **C1-MembershipInboundMessage** – Enables you to add or update a membership in a policy plan.

The inbound message type helps the system to determine:

- The business object using which the inbound message should be created.
- The business object using which the person should be created or updated when the inbound message contains the person information.
- The business object using which the account should be created or updated when the inbound message contains the account (bill group) information.
- The business object using which the hold request should be created when the **Invoice Hold Reason** characteristic is defined for an account in the inbound message.
- The statuses to which the policy must be transitioned when the inbound message is sent to terminate, reinstate, or renew a policy.

On calling the **C1-CustomerStructureInboundMessage** web service, a customer inbound message is created in the **Pending** status. When the **Customer Inbound Message Periodic Monitor (C1-CUSIN)** batch is invoked, the system checks whether there are any customer inbound messages in the **Pending** status. If there is a customer inbound message in the **Pending** status, the system validates the inbound message. If the customer inbound message is successfully validated, it is processed further and the following entities are either created or updated in the system (based on the available information):

- Person
- Account
- Contract
- Policy (created using the policy type defined in the **Customer Inbound Message – Processing (C1-CINMSGPRC)** algorithm)
- Policy Plan (created using the **Policy Plan BO** characteristic defined on the policy type)
- Billable Charge (for non-eligibility based fees)

Once all required entities are created or updated in ORMB, the status of the customer inbound message is changed to **Processed**. If any error occurs while validating or processing a customer inbound message, the status of the customer inbound message is changed to **Rejected**. The system enables you to either reprocess or void a rejected customer inbound message. The system can reprocess a customer inbound message only when its status is changed to **Pending**. Using the **Retry** option, you can change the status of the customer inbound message from **Rejected** to **Pending**. The **Customer Inbound Message Periodic Monitor (C1-CUSIN)** batch will then reconsider and reprocess the customer inbound message. You can also configure the system such that the batch can automatically retry to process the rejected customer inbound messages. However, it will attempt to retry only when the **Maximum Retry** parameter in the **Retry for To Dos (C1-TODORETRY)** algorithm is set to a value greater than zero. Also, the maximum number of times the batch can attempt to retry and reprocess a customer inbound message depends on the value defined in the **Maximum Retry** parameter.

However, on calling the **C1-MembershipInboundMessage** web service, a membership inbound message is created in the **Pending** status. When the **Membership Inbound Message Periodic Monitor (C1-MEMIN)** batch is invoked, the system checks whether there are any membership inbound messages in the **Pending** status. If there is a membership inbound message in the **Pending** status, the system validates the inbound message. If the membership inbound message is successfully validated, it is processed further and the following entities are either created or updated in the system (based on the available information):

- Membership
- Billable Charge (for Premium)

Once all required entities are created or updated in ORMB, the status of the membership inbound message is changed to **Processed**. If any error occurs while validating or processing a membership inbound message, the status of the membership inbound message is changed to **Rejected**. The system enables you to either reprocess or void a rejected membership inbound message. The system can reprocess a membership inbound message only when its status is changed to **Pending**. Using the **Retry** option, you can change the status of the membership inbound message from **Rejected** to **Pending**. The **Membership Inbound Message Periodic Monitor (C1-MEMIN)** batch will then reconsider and reprocess the membership inbound message. You can also configure the system such that the batch can automatically retry to process the rejected membership inbound messages. However, it will attempt to retry only when the **Maximum Retry** parameter in the **Retry for To Dos (C1-TODORETRY)** algorithm is set to a value greater than zero. Also, the maximum number of times the batch can attempt to retry and reprocess a membership inbound message depends on the value defined in the **Maximum Retry** parameter.

Upload Lockbox Payment and Remittance Advices

Oracle Revenue Management and Billing enables you to upload lockbox payment and remittance advices received in the Electronic Data Exchange (EDI) 820 format. A new batch named **Lockbox Payment Upload - Small Group (C1-PUPSG)** is introduced in this release. This batch is used to read the EDI 820 lockbox file received from the bank containing payment details for accounts and uploads the payment details into the ORMB payment upload staging tables.

The batch uses the reference ID available in the payment and remittance record (in the specified order) to identify the account in the system:

1. Source System Customer Number
2. Invoice ID (if the source system customer number is not available)
3. MICR (if the source system customer number and invoice ID are not available)

If all three reference IDs are available in the payment and remittance record, the system uses the source system customer number to identify the customer in ORMB. If the customer is found in ORMB, the system then checks whether the identified customer has an account. If the identified customer has one account, the system checks the following:

- If the **Check Binder Payment** parameter in the **Pay Tender Staging Account Distribution - Pay Oldest Bill First (C1-CCPYTSADS)** algorithm is set to **Y**, the system checks whether the payment is the first payment for the account and the tender used for the payment is not automatic payment. If so, the payment is applied to the Binder Payment contract.
- If the **Check Promise To Pay** parameter in the **Pay Tender Staging Account Distribution - Pay Oldest Bill First (C1-CCPYTSADS)** algorithm is set to **Y**, the system checks whether there is an active promise to pay for the account. If so, the payment is applied to the On Account contract.
- If the **Check Payment Agreement** parameter in the **Pay Tender Staging Account Distribution - Pay Oldest Bill First (C1-CCPYTSADS)** algorithm is set to **Y**, the system checks whether there is an active payment agreement request for the account. If so, the payment is applied to the On Account contract.

However, if the **Check Binder Payment**, **Check Promise To Pay**, and **Check Payment Agreement** parameters are set to **N**, the payment is applied to the account's open bills in the order of the due date (i.e. oldest bill first). If the payment amount is greater than the account's billed balance plus overpayment threshold amount (defined in the **Pay Tender Staging Account Distribution - Pay Oldest Bill First (C1-CCPYTSADS)** algorithm), the entire amount is applied on the On Account contract.

However, if the payment amount is greater than the account's billed balance, but less than account's billed balance plus overpayment threshold amount, the overpayment amount is applied on the On Account contract.

Let us understand this with the help of an example.

Payment Amount	Bill 1 (Due Date 01-Jan-17)	Bill 2 (Due Date 01-Mar-16)	Overpayment Threshold Amount	System Behavior
100	50	50	50	One payment (50\$) is created for Bill 2 (oldest due date); One payment (50\$) is created for Bill 1
75	50	50	50	One payment (50\$) is created for Bill 2 (oldest due date); One payment (25\$) is created for Bill 1
125	50	50	50	One payment (50\$) is created for Bill 2 (oldest due date); One payment (50\$) is created for Bill 1; The remaining amount (25\$) is applied on the On Account contract
200	50	50	50	The entire amount (200\$) is applied on the On Account contract. This is because the payment amount is greater than the account's billed balance plus overpayment threshold amount.

If the identified customer has multiple accounts, then the payment is applied to the On Account contract. If there are no accounts for the identified customer, or account could not be found in ORMB, or the customer could not be found in ORMB, the payment is applied to the suspense contract defined on the tender source associated with the external source (lockbox) ID.

If the source system customer number is not available, but the invoice ID and MICR are available in the payment and remittance record, then batch uses the invoice ID to find the account for which the invoice is created. Once the account is identified, the system behaves in the similar manner (listed above) when the identified customer has one account.

If the source system customer number and invoice ID are not available, but the MICR is available in the payment and remittance record, then system finds the payment where the same MICR is stamped as a characteristic and then finds the account for which the respective payment is created. In this way, the system derives the account for which the payment must be applied. However, the MICR is used to derive the account only when the **Search Customer Using MICR (Y/N)** parameter in the batch is set to **Y**. Once the account is derived, the system behaves in the similar manner (listed above) when the identified customer has one account.

You can upload payment and remittance advice in the TXT format. You need to ensure that the text file is in the required format; otherwise the file will not be uploaded.

Once the text file is uploaded through the **Lockbox Payment Upload - Small Group (C1-PUPSG)** batch, the deposit control staging, tender control staging, and payment upload staging records are created in the respective tables. You can then execute the **Payment Upload (PUPL)** batch to create the deposit control, tender controls, payment events, tenders, payments, and payment segments using payment records in the staging area.

Billing

From this release onwards, you can do billing for a small group (i.e. up to 50 to 100 Employees). It is expected that small groups enrol their members with the healthcare carriers either directly or through a franchise for healthcare specific policies and plans.

A small group customer can be billed on a regular frequency for premiums, various eligibility based fees (based on the memberships/enrolments) and non eligibility based fees.

A small group billing capabilities include:

- Ability to generate a bill for the future coverage (i.e. prospective) period or a past (i.e. arrears) coverage period.
- Ability to create charges on the bill for premium, state assessment fee, and packaged saving credit for a member.
- Ability to configure bill periods starting from 1st of each month, 15th of each month, etc.
- Ability to prorate charges for premiums and fees based on the actual coverage days.
- Ability to change charges due to retroactivities in the past period.
- Ability to correct bills based on retroactivities.
- Ability to waive off premium with configurable predefined period of premium holiday.
- Ability to process premium holiday from the retrospective period.
- Ability to keep invoicing on hold and release the hold whenever required through a hold request.
- Ability to review and complete a bill based on tolerance and To Do type.
- Ability to generate bills for one time (ad hoc) and recurring charges.

Enhancements

This section lists the enhancements made to the following features:

- Person Information
- Statement Construct
- Policy
- Payment Distribution
- Pricing
- Transaction Feed Management

Person Information

The following changes are made to the person information feature:

- You can now define multiple bill routing records for the person which is linked to the account. In the bill routing information, you can specify a particular address where the bills or quotes generated for the account must be sent to the person. If the address ID is not specified and address source is set to **Person**, the mailing address which is effective for the person at the time of billing is considered for bill routing. Similarly, if the address ID is not specified and address source is set to **Account Override**, the account override address which is effective for the account-person combination at the time of billing is considered for bill routing.
- You can now define custom values in the **BILL_ADDR_SRCE_FLG** lookup field. If you add a custom value in the **BILL_ADDR_SRCE_FLG** lookup field, you need to ensure that the same value is also added in the **STM_ADDR_SRC_FLG** and **ADDRESS_TYPE_FLG** lookup fields.

Statement Construct

The following changes are made to the statement construct feature:

- You can now specify a particular address where the statements generated for the person must be sent. If the address ID is not specified and address source is set to **Person**, the mailing address which is effective for the person at the time of statement generation is considered for statement routing.
- You can now define custom values in the **STM_ADDR_SRC_FLG** lookup field. If you add a custom value in the **STM_ADDR_SRC_FLG** lookup field, you need to ensure that the same value is also added in the **BILL_ADDR_SRCE_FLG** and **ADDRESS_TYPE_FLG** lookup fields.

Policy

The following changes are made to the policy feature:

- Now, the following characteristics are mandatory while defining a policy:
 - Proration Rule
 - Policy Suffix Value
 - Base Policy Indicator
 - State of Issue
 - Rating Zip Code
- Earlier, you were able to directly cancel the policy. Now, the policy cancellation is a two-step process. You need to first initiate the policy cancellation process by clicking the **Initiate Cancellation** button. On initiating the policy cancellation process, the status of the policy is change from **In Force/Active** to **Pending Cancellation**. You need to then click the **Cancel** button to cancel the policy. The status of the policy is changed from **Pending Cancellation** to **Canceled**.
- The following two statuses are added in the lifecycle of the policy:
 - Activate
 - Pending Termination Overridden
- At present, the system enables you to just initiate the policy termination process from the **Policy** screen by clicking the **Initiate Termination** button. On initiating the policy termination process, the status of the policy is change from **In Force/Active** to **Pending Termination**. In addition, an outbound message is created for the policy enrolment (source) system indicating that the policy termination process is initiated. Only, when the inbound message is received from the policy enrolment (source) system requesting to terminate the policy, the policy is terminated in the system and the status of the policy is changed from **Pending Termination** to **Terminated**.
- The system does not allow you to reinstate a policy from the **Policy** screen. Through an upload request, the policy enrolment (source) system sends a request to initiate the reinstatement process for a policy. On submitting or approving an upload request, the status of the policy is changed from **In Force/Active** to **Pending Reinstatement**. In addition, an outbound is created for the policy enrolment (source) system informing that the policy reinstatement process is initiated. Only, when the inbound message is received from the policy enrolment (source) system requesting to reinstate the policy, the policy is reinstated in the system and the status of the policy is changed from **Pending Reinstatement** to **Reinstated** and then from **Reinstated** to **In Force/Active**.
- A new policy status reason business object is introduced in this release. It is used in the **C1-POLICY** business object.

Payment Distribution

The following two algorithm types are shipped in this release:

- **C1-MATSATYP** – This algorithm applies payment against a contract of a particular contract type. It searches whether an active contract of the specified contract type is available on the account. If so, it applies the payment against the active contract. If the active contract is not available on the account, it creates a contract of the specified contract type on the account and applies payment against the contract. However, if multiple active contracts of the specified contract type are available on the account, it applies payment against the contract of a contract type with the highest priority. It contains the following two parameters:
 - **Contract Type** – Used to specify the contract type against whose active contract you want to apply the payment.
 - **Customer Class** – Used when you do not want to make payments against an active contract for accounts belonging to a particular customer class.

The following three algorithms which are created using the **C1-MATSATYP** algorithm type are shipped in this release:

- **C1-MATBIND** – Used to apply payment against a binder contract.
- **C1-MATONACCT** – Used to apply payment against an on account contract.
- **C1-MATSUSP** - Used to apply payment against a general suspense contract.
- **C1-PYBLPRPD** – This algorithm applies payment against bill segments of an unpaid bill. The payment is applied against bill segments based on the coverage period. For example, the payment amount is 100\$ and BS1 with the coverage period 1st Jan 2010 to 31st Jan 2010 is 75\$ and BS2 with the coverage period 1st Apr 2010 to 30th Apr 2010 is 50\$, then the algorithm first applies payment against BS1 (Payment Amount 75\$) and then against BS2 (Payment Amount 25\$). If the bill segments have the same coverage period, the payment is applied against the bill segments based on the priority of the contract type. However, if two or more bill segments have the same coverage period, contract priority and plan (such as, medical), the payment is applied against the bill segments based on the amount. The bill segment with the lowest amount is paid off first. If multiple bill segments have the same coverage period, contract priority, and amount, then the payment is applied against the bill segments based on the subscriber name (in the alphabetical order). For example, BS1 is for John and BS2 is for Anny, then BS2 which is for Anny is paid off first.

If two or more bill segments have the same coverage period and contract priority, but different plans (such as medical and dental), the algorithm uses the weighted average mechanism to distribute payment against bill segments. It contains the following parameter:

- **Contract Types For Weighted Distribution List** – Used when you want to specify a particular contract type for which weighted average mechanism should be used to distribute payment against bill segments of the respective contracts. You can specify comma-separated values in this parameter.

Pricing

The following changes are made to the pricing management feature:

- The following screens are scrapped in this release:
 - Copy Bundle
 - Copy Price List
 - Price Item SQIs
- The following screens are redesigned in this release:
 - Price Item
 - Price List
 - Price Item Relationship (formerly known as Price Item Relationship Maintenance)
 - Price List Price Item Pricing (formerly known as Price List Price Item Assignments)
 - Price List Assignment (Account)
 - Price List Assignment (Person)
 - Pricing (Account)
 - Pricing (Person)
- Earlier, you were able to navigate to the following screens from the **Banking Control Central** screen:
 - Price List Assignment: <Account Information>
 - Price List Assignment: <Person Information>
 - Pricing (Account)
 - Pricing (Person)

Now, you can also navigate to these screens from the **Customer 360-Degree View** screen.

Transaction Feed Management

The following changes are made to the transaction feed management feature:

- Earlier, multi-threading for the **Disaggregation Request Creation (C1-DISTG)** batch was based on division and chunks for multi-threading were created based on numerical distribution of division. However, now, multi-threading for the **Disaggregation Request Creation (C1-DISTG)** batch is based on account ID and chunks for multi-threading are created based on numerical distribution of account ID. This change is done to improve the performance of the **Disaggregation Request Creation (C1-DISTG)** batch.
- At present, the **Update Disaggregation Request Status (C1-DARSU)** batch enables you to change the status of the disaggregation request in the CI_TXN_DISAGG_REQ table to COMPLETE. Alternatively, a new batch named **Update Disaggregation Request Status From Algorithm (C1-DRSUA)** is introduced in this release. It allows you to specify an algorithm which contains the logic when the status of the disaggregation request in the CI_TXN_DISAGG_REQ table must be changed to COMPLETE. The **C1-UDAR** algorithm type is shipped in this release. It changes the status of the disaggregation requests (which are successfully executed) to COMPLETE in the

CI_TXN_DISAGG_REQ table. You can either attach an algorithm created using the **C1-UDAR** algorithm type or a custom algorithm (created based on the business requirements) in the **Update Disaggregation Request Status From Algorithm (C1-DRSUA)** batch.

- Earlier, when you created a disaggregation request for a person from the **Disaggregation Request** screen, the disaggregation request was created for the person. Now, when you create a disaggregation request for a person from the **Disaggregation Request** screen, the system does not create the disaggregation request for the person. Instead, the system creates the disaggregation request for all accounts of the person (where the person is the main customer) and its child persons.

User Interface (UI) Level Changes

The following table lists changes made to the existing screens in Oracle Revenue Management and Billing:

Screen Name (in 2.6.0.0.0)	Changes
Account	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Mailing Location ID and Protect Mailing Location fields are removed from the Main tab. • The Mailing Location on Account option is removed from the Address Source list in the Persons tab. • The Address ID field is added in the Bill Routing Information section on the Persons tab. • The Exclude Accrual and Accrual Cycle fields are added in the Main tab.
Statement Construct	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Mailing Location ID field is removed from the Main tab. • The Mailing Location option is removed from the Address Source list in the Main tab. • The Address ID field is added in the Main tab.
Bill	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Address ID field is added in the Bill Routings tab.
Policy Query	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Pending Termination Overridden option is added in the Status list. • The Cancelled option in the Status list is renamed to Canceled. • The Reinstate option in the Status list is renamed to Reinstated.
Policy	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The following buttons are added in the Record Actions section of the Policy zone: <ul style="list-style-type: none"> ○ Initiate Cancellation ○ Renew ○ Terminate • The Terminate Request button is renamed to Initiate Termination. • The In Force/Active button is renamed to Activate.
Division	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Eligible for Accrual and Accrual Cycle fields are added in the

Screen Name (in 2.6.0.0.0)	Changes
	<p>Main tab.</p>
Price Item	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Search By field is added in the Search Price Item zone. • The Available For field is renamed to Price Item Available For. • The Price Item and Description columns are removed from the Search Results section. Instead, the Price Item Information column is added in the Search Results section. On clicking the link in the Price Item Information column corresponding to a price item, a new screen named Price Item appears where you can view the details of the price item. • The Available For column is renamed to Price Item Available For. • The Assigned To column is renamed to Price Item Assigned To. • The following columns are removed from the Search Results section: <ul style="list-style-type: none"> ○ Global Price List ○ Bundle ○ View ○ Edit • The Price Item Relationship column is added in the Search Results section. On clicking the icon in the Price Item Relationship column, a new screen named Price Item Relationship appears.
Price Item Relationship	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The following fields are added in the Assigned Price Items zone: <ul style="list-style-type: none"> ○ Price Item ○ Description ○ Effective Start Date ○ Relationship Type • The Price Item and Description columns are removed from the Assigned Price Items zone. Instead, the Price Item Information column is added in the Assigned Price Items zone. • The Price Item Information zone is removed from this screen.
Price Item Assignments	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Price Item Information zone is removed from this screen.

Screen Name (in 2.6.0.0.0)	Changes
	<ul style="list-style-type: none"> • The Price List Description column is removed from the Active Price Lists where Price Item is Assigned zone. Instead, the Price List Information column is added. On clicking the link in the Price List Information column corresponding to a price list, the Price List screen appears where you can view the details of the price list. • The Persons where Price Item is Assigned zone is renamed to Persons to whom Price Item is Assigned.
Price List	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Parent Price List Description field is removed from the Search Price List zone. Instead, the Parent Price List ID field is added. • The following fields are now available when you click the Advanced Search link in the right side of the Search Price List zone: <ul style="list-style-type: none"> ○ Availability Start Date ○ Availability End Date ○ Status ○ Parent Price List ID ○ Parent Price List Effective Date • The Price List ID and Price List Description columns are removed from the Search Results section. Instead, the Price List Information column is added in the Search Results section. On clicking the link in the Price List Information column corresponding to a price list, a new screen named Price List appears where you can view the details of the price list. • The following columns are removed from the Search Results section: <ul style="list-style-type: none"> ○ Global Price List ○ Price List Type ○ Edit ○ View ○ Parent Price List Description ○ Parent Price List Effective From Date ○ Parent Price List Effective To Date • The Eligible Accounts and Persons column is renamed to Eligible Accounts/Persons. • The Assigned To column is renamed to Price List Assigned To.

Screen Name (in 2.6.0.0.0)	Changes
	<ul style="list-style-type: none"> • The Price List Pricing column is added in the Search Results section. On clicking the icon in Price List Pricing column corresponding to a price list, the Price List Price Item Pricing screen appears. • The Price Item and Description columns are removed from the Price List Price Items zone. Instead, the Pricing Information column is added in the Price List Price Items zone. • The Price Item Parameters column is renamed to Pricing Parameters. • The Pricing Status column is added in the Price List Price Items zone. • The following columns are removed from the Price List Price Items zone: <ul style="list-style-type: none"> ○ Pricing Currency ○ Rate Schedule ○ Assignment Information ○ Price Assignment Usage
Price List Price Item Pricing	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Price List Price Item Assignments screen is renamed to Price List Price Item Pricing. • The following zones are removed from this screen: <ul style="list-style-type: none"> ○ Price List Information ○ Price List Division ○ Search Price Assignment • The Price List Price Items zone is added in this screen. • The query options available in the Search Price Item and Search Price Assignment zones are merged into the Search Price Item zone. And, the Search Price Assignment zone is removed from this screen. • The Search By field is added in the Search Price Item zone. It contains the following options: <ul style="list-style-type: none"> ○ Price Item ○ Price List Pricing (formerly known as Price Assignment of a Price List) ○ Account Override Pricing (formerly known as Price Assignment of an Account)

Screen Name (in 2.6.0.0.0)	Changes																											
	<ul style="list-style-type: none"> ○ Person Override Pricing (formerly known as Price Assignment of a Person) • The following table indicates the fields which are added or removed when you search using the respective option: <table border="1" data-bbox="610 472 1430 795"> <thead> <tr> <th>Search Option</th> <th>Added Field</th> <th>Removed Field</th> </tr> </thead> <tbody> <tr> <td>Price List Pricing</td> <td>Price List ID</td> <td>Description, Price List Description</td> </tr> <tr> <td>Person Override Pricing</td> <td>Effective Start Date, Effective End Date</td> <td>Description</td> </tr> <tr> <td>Account Override Pricing</td> <td>Effective Start Date, Effective End Date</td> <td>Description</td> </tr> </tbody> </table> • The following table indicates the columns which are added or removed when you search using the respective option: <table border="1" data-bbox="610 909 1430 1709"> <thead> <tr> <th>Search Option</th> <th>Added Column</th> <th>Removed Column</th> </tr> </thead> <tbody> <tr> <td>Price Item</td> <td>Price Item Information, Assign</td> <td>Price Item, Description, Global Price List, Unit of Measure, Bundle, Bundle Type</td> </tr> <tr> <td>Price List Pricing</td> <td>Pricing Information, Price List Information, Price Assignment Usage, Price Assignment Type</td> <td>Price Item, Description, Price List Description, Pricing Status, Rate Description</td> </tr> <tr> <td>Person Override Pricing</td> <td>Pricing Information, Person Information, Price Assignment Usage, Price Assignment Type</td> <td>Price Item, Description, Person Name, Pricing Status, Rate Description</td> </tr> <tr> <td>Account Override Pricing</td> <td>Pricing Information, Price Assignment Usage, Price Assignment Type</td> <td>Price Item, Description, Pricing Status, Rate Description</td> </tr> </tbody> </table> • The Price Item Parameters column is renamed to Pricing Parameters. 	Search Option	Added Field	Removed Field	Price List Pricing	Price List ID	Description, Price List Description	Person Override Pricing	Effective Start Date, Effective End Date	Description	Account Override Pricing	Effective Start Date, Effective End Date	Description	Search Option	Added Column	Removed Column	Price Item	Price Item Information, Assign	Price Item, Description, Global Price List, Unit of Measure, Bundle, Bundle Type	Price List Pricing	Pricing Information, Price List Information, Price Assignment Usage, Price Assignment Type	Price Item, Description, Price List Description, Pricing Status, Rate Description	Person Override Pricing	Pricing Information, Person Information, Price Assignment Usage, Price Assignment Type	Price Item, Description, Person Name, Pricing Status, Rate Description	Account Override Pricing	Pricing Information, Price Assignment Usage, Price Assignment Type	Price Item, Description, Pricing Status, Rate Description
Search Option	Added Field	Removed Field																										
Price List Pricing	Price List ID	Description, Price List Description																										
Person Override Pricing	Effective Start Date, Effective End Date	Description																										
Account Override Pricing	Effective Start Date, Effective End Date	Description																										
Search Option	Added Column	Removed Column																										
Price Item	Price Item Information, Assign	Price Item, Description, Global Price List, Unit of Measure, Bundle, Bundle Type																										
Price List Pricing	Pricing Information, Price List Information, Price Assignment Usage, Price Assignment Type	Price Item, Description, Price List Description, Pricing Status, Rate Description																										
Person Override Pricing	Pricing Information, Person Information, Price Assignment Usage, Price Assignment Type	Price Item, Description, Person Name, Pricing Status, Rate Description																										
Account Override Pricing	Pricing Information, Price Assignment Usage, Price Assignment Type	Price Item, Description, Pricing Status, Rate Description																										
Price List Assignment:	The following changes are made to this screen:																											

Screen Name (in 2.6.0.0.0)	Changes																		
<Account Information>	<ul style="list-style-type: none"> • The Price List Assignment (Account) screen is renamed to Price List Assignment: <Account Information>. • The following zones are removed from this screen: <ul style="list-style-type: none"> ○ Account Information ○ Assigned Price Lists ○ Historical Price List Assignments ○ Inactive Price List Assignments • The Price List Assignments zone is added in this screen. • The Search Price List zone is renamed to Search Price List for Assignment. • The Eligible Price Lists option is removed from the Search By list of the Search Price List for Assignment zone. • The following table indicates the fields which are added or removed when you search using the respective option: <table border="1" data-bbox="610 947 1429 1287"> <thead> <tr> <th>Search Option</th> <th>Added Field</th> <th>Removed Field</th> </tr> </thead> <tbody> <tr> <td>Price List</td> <td>Status, Price List Type, Only Eligible Price Lists, Eligibility Date</td> <td>-</td> </tr> <tr> <td>Assigned Price List</td> <td>Account ID, Person ID</td> <td>Person Name, Account Identifier Type, Account Identifier</td> </tr> </tbody> </table> • The following table indicates the columns which are added or removed when you search using the respective option: <table border="1" data-bbox="610 1402 1429 1869"> <thead> <tr> <th>Search Option</th> <th>Added Column</th> <th>Removed Column</th> </tr> </thead> <tbody> <tr> <td>Price List</td> <td>Price List Information, Availability Start Date, Availability End Date</td> <td>Price List ID, Price List Description</td> </tr> <tr> <td>Assigned Price List</td> <td>Price List Information, Account Information</td> <td>Price List ID, Account ID, Account Identifier Type, Account Identifier, Person Name, Price List Description, Effective Start Date, Effective End Date</td> </tr> </tbody> </table> 	Search Option	Added Field	Removed Field	Price List	Status, Price List Type, Only Eligible Price Lists, Eligibility Date	-	Assigned Price List	Account ID, Person ID	Person Name, Account Identifier Type, Account Identifier	Search Option	Added Column	Removed Column	Price List	Price List Information, Availability Start Date, Availability End Date	Price List ID, Price List Description	Assigned Price List	Price List Information, Account Information	Price List ID, Account ID, Account Identifier Type, Account Identifier, Person Name, Price List Description, Effective Start Date, Effective End Date
Search Option	Added Field	Removed Field																	
Price List	Status, Price List Type, Only Eligible Price Lists, Eligibility Date	-																	
Assigned Price List	Account ID, Person ID	Person Name, Account Identifier Type, Account Identifier																	
Search Option	Added Column	Removed Column																	
Price List	Price List Information, Availability Start Date, Availability End Date	Price List ID, Price List Description																	
Assigned Price List	Price List Information, Account Information	Price List ID, Account ID, Account Identifier Type, Account Identifier, Person Name, Price List Description, Effective Start Date, Effective End Date																	

Screen Name (in 2.6.0.0.0)	Changes						
<p>Price List Assignment (appears when you assign a price list to an account)</p>	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Price List Assignment (Account) screen is renamed to Price List Assignment. • Earlier, there were two tabs in this screen – Main and Characteristics. Now, there are two sections in this screen - Main and Characteristics. • The following two fields are added in the Main section: <ul style="list-style-type: none"> ○ Account Information ○ Price List Information • The following fields are removed from the Main section: <ul style="list-style-type: none"> ○ Person Name ○ Account ID ○ Primary Account Identifier ○ Division ○ Price List ID ○ Price List Description 						
<p>Price List Assignment: <Person Information></p>	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Price List Assignment (Person) screen is renamed to Price List Assignment: <Person Information>. • The following zones are removed from this screen: <ul style="list-style-type: none"> ○ Person Information ○ Assigned Price Lists ○ Historical Price List Assignments ○ Inactive Price List Assignments • The Price List Assignments zone is added in this screen. • The Search Price List zone is renamed to Search Price List for Assignment. • The Eligible Price Lists option is removed from the Search By list of the Search Price List for Assignment zone. • The following table indicates the fields which are added or removed when you search using the respective option: <table border="1" data-bbox="610 1703 1435 1877"> <thead> <tr> <th data-bbox="610 1703 829 1759">Search Option</th> <th data-bbox="829 1703 1138 1759">Added Field</th> <th data-bbox="1138 1703 1435 1759">Removed Field</th> </tr> </thead> <tbody> <tr> <td data-bbox="610 1759 829 1877">Price List</td> <td data-bbox="829 1759 1138 1877">Status, Price List Type, Only Eligible Price Lists, Eligibility Date</td> <td data-bbox="1138 1759 1435 1877">-</td> </tr> </tbody> </table>	Search Option	Added Field	Removed Field	Price List	Status, Price List Type, Only Eligible Price Lists, Eligibility Date	-
Search Option	Added Field	Removed Field					
Price List	Status, Price List Type, Only Eligible Price Lists, Eligibility Date	-					

Screen Name (in 2.6.0.0.0)	Changes														
	<table border="1" data-bbox="610 285 1437 443"> <tr> <td data-bbox="610 285 824 443">Assigned Price List</td> <td data-bbox="829 285 1133 443">Account ID, Person ID</td> <td data-bbox="1138 285 1437 443">Person Name, Account Identifier, Type, Account Identifier</td> </tr> </table> <ul data-bbox="561 464 1437 537" style="list-style-type: none"> The following table indicates the columns which are added or removed when you search using the respective option: <table border="1" data-bbox="610 552 1437 1035"> <thead> <tr> <th data-bbox="610 552 824 604">Search Option</th> <th data-bbox="829 552 1133 604">Added Column</th> <th data-bbox="1138 552 1437 604">Removed Column</th> </tr> </thead> <tbody> <tr> <td data-bbox="610 611 824 800">Price List</td> <td data-bbox="829 611 1133 800">Price List Information, Availability Start Date, Availability End Date</td> <td data-bbox="1138 611 1437 800">Price List ID, Price List Description</td> </tr> <tr> <td data-bbox="610 806 824 1035">Assigned Price List</td> <td data-bbox="829 806 1133 1035">Price List Information, Person Information</td> <td data-bbox="1138 806 1437 1035">Price List ID, Account ID, Account Identifier, Person Name, Price List Description, Effective Start Date, Effective End Date</td> </tr> </tbody> </table>			Assigned Price List	Account ID, Person ID	Person Name, Account Identifier, Type, Account Identifier	Search Option	Added Column	Removed Column	Price List	Price List Information, Availability Start Date, Availability End Date	Price List ID, Price List Description	Assigned Price List	Price List Information, Person Information	Price List ID, Account ID, Account Identifier, Person Name, Price List Description, Effective Start Date, Effective End Date
Assigned Price List	Account ID, Person ID	Person Name, Account Identifier, Type, Account Identifier													
Search Option	Added Column	Removed Column													
Price List	Price List Information, Availability Start Date, Availability End Date	Price List ID, Price List Description													
Assigned Price List	Price List Information, Person Information	Price List ID, Account ID, Account Identifier, Person Name, Price List Description, Effective Start Date, Effective End Date													
Price List Assignment (appears when you assign a price list to a person)	<p>The following changes are made to this screen:</p> <ul data-bbox="561 1094 1437 1665" style="list-style-type: none"> The Price List Assignment (Person) screen is renamed to Price List Assignment. Earlier, there were two tabs in this screen – Main and Characteristics. Now, there are two sections in this screen - Main and Characteristics. The following two fields are added in the Main section: <ul data-bbox="659 1304 963 1377" style="list-style-type: none"> ○ Person Information ○ Price List Information The following fields are removed from the Main section: <ul data-bbox="659 1440 865 1665" style="list-style-type: none"> ○ Person Name ○ Person ID ○ Division ○ Price List ID ○ Price List Description 														
Price List Assignments	<p>The following changes are made to this screen:</p> <ul data-bbox="561 1734 1437 1871" style="list-style-type: none"> The Price List Information zone is removed from this screen. The Persons where Price List is Assigned zone is renamed to Persons to whom Price List is Assigned. 														

Screen Name (in 2.6.0.0.0)	Changes
Persons and Accounts Eligible for Price List Assignment: <Price List Information>	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Eligible Accounts and Persons screen is renamed to Persons and Accounts Eligible for Price List Assignment: <Price List Information>. • The Price List Information zone is removed from this screen. • The Accounts Eligible for Price List Assignment zone is renamed to Eligible Accounts. • The Persons Eligible for Price List Assignment zone is renamed to Eligible Persons. • The Eligibility Effective Date is renamed to Effective Date in both the zone – Eligible Accounts and Eligible Persons.
Price List Assignment (appears when you assign a price list to an account from the Persons and Accounts Eligible for Price List Assignment: <Price List Information> screen)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • Earlier, there were two tabs in this screen – Main and Characteristics. Now, there are two sections in this screen - Main and Characteristics. • The Price List Information field is added in the Main section. • The following fields are removed from the Main section: <ul style="list-style-type: none"> ○ Price List ID ○ Price List Description
Price List Assignment (appears when you assign a price list to a person from the Persons and Accounts Eligible for Price List Assignment: <Price List Information> screen)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • Earlier, there were two tabs in this screen – Main and Characteristics. Now, there are two sections in this screen - Main and Characteristics. • The Price List Information field is added in the Main section. • The following fields are removed from the Main section: <ul style="list-style-type: none"> ○ Price List ID ○ Price List Description
Pricing (Account)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Account Information zone is removed from this screen. • The Effective Price Assignment zone is renamed to Effective Price Assignments for Account. • A drop-down list is available in the Assignment Level and Show Default and Global Pricing fields. • The following columns are removed from the Effective Price Assignments for Account zone: <ul style="list-style-type: none"> ○ Description ○ Price List Description ○ View Price Item Pricing

Screen Name (in 2.6.0.0.0)	Changes															
	<ul style="list-style-type: none"> • The following columns are added in the Effective Price Assignments for Account zone: <ul style="list-style-type: none"> ○ Pricing Information ○ Price List Information • The Price Item Parameters column is renamed to Pricing Parameters. • The Rate Description column is renamed to Rate Schedule. • The Export To Excel link is removed. You can now export the effective price assignments using the Export To Excel option in the Explorer Zone Menu. • The query options available in the Search Price Item and Search Price Assignment zones are merged into the Search Price Item zone. And, the Search Price Assignment zone is removed from this screen. • The Search By field is added in the Search Price Item zone. It contains the following options: <ul style="list-style-type: none"> ○ Price Item ○ Price List Pricing (formerly known as Price Assignment of a Price List) ○ Account Override Pricing (formerly known as Price Assignment of an Account) ○ Person Override Pricing (formerly known as Price Assignment of a Person) • The following table indicates the fields which are added or removed when you search using the respective option: <table border="1" data-bbox="610 1394 1432 1808"> <thead> <tr> <th>Search Option</th> <th>Added Field</th> <th>Removed Field</th> </tr> </thead> <tbody> <tr> <td>Price Item</td> <td>Bundle</td> <td>-</td> </tr> <tr> <td>Price List Pricing</td> <td>Price List ID</td> <td>Description, Price List Description</td> </tr> <tr> <td>Person Override Pricing</td> <td>Effective Start Date, Effective End Date</td> <td>Description</td> </tr> <tr> <td>Account Override Pricing</td> <td>Effective Start Date, Effective End Date</td> <td>Description</td> </tr> </tbody> </table> • The following table indicates the columns which are added or 	Search Option	Added Field	Removed Field	Price Item	Bundle	-	Price List Pricing	Price List ID	Description, Price List Description	Person Override Pricing	Effective Start Date, Effective End Date	Description	Account Override Pricing	Effective Start Date, Effective End Date	Description
Search Option	Added Field	Removed Field														
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Person Override Pricing	Effective Start Date, Effective End Date	Description														
Account Override Pricing	Effective Start Date, Effective End Date	Description														

Screen Name (in 2.6.0.0.0)	Changes															
	<p>removed when you search using the respective option:</p> <table border="1" data-bbox="610 338 1433 1209"> <thead> <tr> <th data-bbox="610 338 837 390">Search Option</th> <th data-bbox="837 338 1138 390">Added Column</th> <th data-bbox="1138 338 1433 390">Removed Column</th> </tr> </thead> <tbody> <tr> <td data-bbox="610 390 837 585">Price Item</td> <td data-bbox="837 390 1138 585">Price Item Information, Assign</td> <td data-bbox="1138 390 1433 585">Price Item, Description, Global Price List, Unit of Measure, Bundle, Bundle Type</td> </tr> <tr> <td data-bbox="610 585 837 781">Price List Pricing</td> <td data-bbox="837 585 1138 781">Pricing Information, Price List Information</td> <td data-bbox="1138 585 1433 781">Price Item, Description, Price List Description, Pricing Status, Rate Description</td> </tr> <tr> <td data-bbox="610 781 837 1047">Person Override Pricing</td> <td data-bbox="837 781 1138 1047">Pricing Information, Person Information, Price Assignment Usage, Price Assignment Type, Effective Start Date, Effective End Date</td> <td data-bbox="1138 781 1433 1047">Price Item, Description, Person Name, Status, Rate Description, Assignment Type, Start Date, End Date</td> </tr> <tr> <td data-bbox="610 1047 837 1209">Account Override Pricing</td> <td data-bbox="837 1047 1138 1209">Pricing Information, Price Assignment Usage</td> <td data-bbox="1138 1047 1433 1209">Price Item, Description, Pricing Status, Rate Description</td> </tr> </tbody> </table> <ul style="list-style-type: none"> • The Price Item Parameters column is renamed to Pricing Parameters. • You can search for a price item using the Search icon corresponding to the Price Item field. 	Search Option	Added Column	Removed Column	Price Item	Price Item Information, Assign	Price Item, Description, Global Price List, Unit of Measure, Bundle, Bundle Type	Price List Pricing	Pricing Information, Price List Information	Price Item, Description, Price List Description, Pricing Status, Rate Description	Person Override Pricing	Pricing Information, Person Information, Price Assignment Usage, Price Assignment Type, Effective Start Date, Effective End Date	Price Item, Description, Person Name, Status, Rate Description, Assignment Type, Start Date, End Date	Account Override Pricing	Pricing Information, Price Assignment Usage	Price Item, Description, Pricing Status, Rate Description
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Price List Pricing	Pricing Information, Price List Information	Price Item, Description, Price List Description, Pricing Status, Rate Description														
Person Override Pricing	Pricing Information, Person Information, Price Assignment Usage, Price Assignment Type, Effective Start Date, Effective End Date	Price Item, Description, Person Name, Status, Rate Description, Assignment Type, Start Date, End Date														
Account Override Pricing	Pricing Information, Price Assignment Usage	Price Item, Description, Pricing Status, Rate Description														
Pricing (Person)	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> • The Person Information zone is removed from this screen. • The Effective Price Assignment zone is renamed to Effective Price Assignments for Person. • A drop-down list is available in the Assignment Level and Show Default and Global Pricing fields. • The following columns are removed from the Effective Price Assignments for Person zone: <ul style="list-style-type: none"> ○ Description 															

Screen Name (in 2.6.0.0.0)	Changes															
	<ul style="list-style-type: none"> ○ Price List Description ○ View Price Item Pricing ● The following columns are added in the Effective Price Assignments for Person zone: <ul style="list-style-type: none"> ○ Pricing Information ○ Price List Information ● The Price Item Parameters column is renamed to Pricing Parameters. ● The Rate Description column is renamed to Rate Schedule. ● The Export To Excel link is removed. You can now export the effective price assignments using the Export To Excel option in the Explorer Zone Menu. ● The query options available in the Search Price Item and Search Price Assignment zones are merged into the Search Price Item zone. And, the Search Price Assignment zone is removed from this screen. ● The Search By field is added in the Search Price Item zone. It contains the following options: <ul style="list-style-type: none"> ○ Price Item ○ Price List Pricing (formerly known as Price Assignment of a Price List) ○ Account Override Pricing (formerly known as Price Assignment of an Account) ○ Person Override Pricing (formerly known as Price Assignment of a Person) ● The following table indicates the fields which are added or removed when you search using the respective option: <table border="1" data-bbox="610 1486 1435 1890"> <thead> <tr> <th data-bbox="610 1486 846 1541">Search Option</th> <th data-bbox="846 1486 1157 1541">Added Field</th> <th data-bbox="1157 1486 1435 1541">Removed Field</th> </tr> </thead> <tbody> <tr> <td data-bbox="610 1541 846 1633">Price Item</td> <td data-bbox="846 1541 1157 1633">Bundle</td> <td data-bbox="1157 1541 1435 1633">-</td> </tr> <tr> <td data-bbox="610 1633 846 1726">Price List Pricing</td> <td data-bbox="846 1633 1157 1726">Price List ID</td> <td data-bbox="1157 1633 1435 1726">Description, Price List Description</td> </tr> <tr> <td data-bbox="610 1726 846 1818">Person Override Pricing</td> <td data-bbox="846 1726 1157 1818">Effective Start Date, Effective End Date</td> <td data-bbox="1157 1726 1435 1818">Description</td> </tr> <tr> <td data-bbox="610 1818 846 1890">Account Override Pricing</td> <td data-bbox="846 1818 1157 1890">Effective Start Date, Effective End Date</td> <td data-bbox="1157 1818 1435 1890">Description</td> </tr> </tbody> </table>	Search Option	Added Field	Removed Field	Price Item	Bundle	-	Price List Pricing	Price List ID	Description, Price List Description	Person Override Pricing	Effective Start Date, Effective End Date	Description	Account Override Pricing	Effective Start Date, Effective End Date	Description
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Screen Name (in 2.6.0.0.0)	Changes															
	<ul style="list-style-type: none"> The following table indicates the columns which are added or removed when you search using the respective option: <table border="1" data-bbox="610 390 1437 1192"> <thead> <tr> <th data-bbox="610 390 837 443">Search Option</th> <th data-bbox="837 390 1138 443">Added Column</th> <th data-bbox="1138 390 1437 443">Removed Column</th> </tr> </thead> <tbody> <tr> <td data-bbox="610 443 837 642">Price Item</td> <td data-bbox="837 443 1138 642">Price Item Information, Assign</td> <td data-bbox="1138 443 1437 642">Price Item, Description, Global Price List, Unit of Measure, Bundle, Bundle Type</td> </tr> <tr> <td data-bbox="610 642 837 835">Price List Pricing</td> <td data-bbox="837 642 1138 835">Pricing Information, Price List Information</td> <td data-bbox="1138 642 1437 835">Price Item, Description, Price List Description, Pricing Status, Rate Description</td> </tr> <tr> <td data-bbox="610 835 837 1031">Person Override Pricing</td> <td data-bbox="837 835 1138 1031">Pricing Information, Person Information, Price Assignment Usage, Price Assignment Type</td> <td data-bbox="1138 835 1437 1031">Price Item, Description, Person Name, Pricing Status, Rate Description, Assignment Type</td> </tr> <tr> <td data-bbox="610 1031 837 1192">Account Override Pricing</td> <td data-bbox="837 1031 1138 1192">Pricing Information, Price Assignment Usage</td> <td data-bbox="1138 1031 1437 1192">Price Item, Description, Pricing Status, Rate Description</td> </tr> </tbody> </table> The Price Item Parameters column is renamed to Pricing Parameters. You can search for a price item using the Search icon corresponding to the Price Item field. 	Search Option	Added Column	Removed Column	Price Item	Price Item Information, Assign	Price Item, Description, Global Price List, Unit of Measure, Bundle, Bundle Type	Price List Pricing	Pricing Information, Price List Information	Price Item, Description, Price List Description, Pricing Status, Rate Description	Person Override Pricing	Pricing Information, Person Information, Price Assignment Usage, Price Assignment Type	Price Item, Description, Person Name, Pricing Status, Rate Description, Assignment Type	Account Override Pricing	Pricing Information, Price Assignment Usage	Price Item, Description, Pricing Status, Rate Description
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Account Override Pricing	Pricing Information, Price Assignment Usage	Price Item, Description, Pricing Status, Rate Description														
View Billed Transactions	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> The Person ID field is added in the Search Bill zone. 															
Transaction Details	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> The Transaction Currency column is removed from the Search zone. Now, you can view the transaction currency in the Transaction Amount column. 															
Feed Management Dashboard	<p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> The Transaction Currency column is removed from the Transaction Level Information zone. Now, you can view the transaction currency in the Transaction Amount column. 															

Database Level Changes

To view the list of objects (such as tables, columns, algorithm types, business objects, and so on) that are newly added in Oracle Revenue Management and Billing Version 2.6.0.0.0, refer to the Appendix A : New Objects in the Oracle Revenue Management and Billing V2.6.0.0.0 Database section in *Oracle Revenue Management and Billing Database Administrator's Guide*.

Supported Platforms

The following table lists the operating system and application server combinations on which Oracle Revenue Management and Billing Version 2.6.0.0.0 is supported:

Operating System and Web Browser (Client)	Operating System (Server)	Chipset	Application Server	Database Server
Windows 7 ¹ , 8.1, 10 (64-bit) (Internet Explorer 11.x)	Oracle Linux 6.x and 7.x (64-bit)	x86_64	WebLogic 12.1.3.x ² (64-bit) WebLogic 12.2.1.x ² (64-bit)	Oracle 12.1.0.2
	Red Hat Enterprise Linux ³ 6.x and 7.x (64-bit)	x86_64	WebLogic 12.1.3.x ² (64-bit) WebLogic 12.2.1.x ² (64-bit)	Oracle 12.1.0.2
	Windows Server 2012 R2 (64-bit)	x86_64	WebLogic 12.1.3.x ² (64-bit) WebLogic 12.2.1.x ² (64-bit)	Oracle 12.1.0.2

Note: We strongly recommend you to install Oracle Revenue Management and Billing (ORMB) on Windows platform only for non-production activities, such as User Acceptance Testing (UAT), development setup, and so on.

¹ Oracle support for Windows XP ends December 2013. Microsoft support for Windows XP ends April 2014.

² At present, ORMB supports both embedded and native installations for WebLogic 12.1.3.x. However, ORMB supports only native installation for WebLogic 12.2.1.x.

³ Oracle Revenue Management and Billing is tested and certified on Oracle Linux 6.x and 7.x. Oracle Linux is 100% userspace-compatible with Red Hat Enterprise Linux, and therefore Oracle Revenue Management and Billing is supported on Red Hat Enterprise Linux.

Framework Upgrade

Oracle Revenue Management and Billing Version 2.6.0.0.0 is based on Oracle Utilities Application Framework Version 4.3.0.4.0. It includes many enhancements that were not available before Oracle Utilities Application Framework Version 4.3.0.4.0. For more information about these enhancements, refer to the Oracle Utilities Application Framework Version 4.3.0.4.0 Enhancements section.

Oracle Utilities Application Framework Version 4.3.0.4.0 Enhancements

This section lists enhancements made in Oracle Utilities Application Framework Version 4.3.0.4.0:

- System Wide Enhancements
- Configuration Tool Enhancements
- Batch Processing Enhancements
- Integration Enhancements
- Configuration Migration Assistant (CMA) Enhancements
- Miscellaneous Enhancements
- System Data Enhancements

System Wide Enhancements

This section lists and describes the following enhancements that are made system wide:

- Introduce New Menu Item Search Facility
- Introduce Shortcut Key for Bookmark Button
- Minimizing the Dashboard Suppresses Refresh of Zones
- Support Ability to Bypass the Home Page when Launching the Application
- Support URI Validation and Substitution
- Adjust Zones that Support Drag and Drop
- Limit Height for Large Explorer Columns with a Width Setting

Introduce New Menu Item Search Facility

In this release, the toolbar has been enhanced to include a search option to **Search Menu**. If a user wants to access a menu entry found on the Menu or the Admin menu, but does not want to use the menu navigation to find the entry, this search option allows the user to search for the menu entry and navigate directly to that page or BPA script.

A shortcut key is also provided for accessing the search: **Ctrl+Alt+F**.

Introduce Shortcut Key for Bookmark Button

The shortcut key **Ctrl+Alt+B** has been enabled to access the Bookmark button.

Minimizing the Dashboard Suppresses Refresh of Zones

In previous releases, when a user minimized the dashboard, dashboard zones would continue to refresh when the user performed any action that would trigger a refresh. This impacted system performance if there were many zones on the dashboard, users would need to wait for the zones to refresh even though the data was not visible.

In this release, the behavior has been changed to suppress the refresh of the content of the zones in the dashboard while the dashboard is minimized. Changes in the context values that drive the dashboard content are retained while the dashboard is minimized. When the user maximizes the dashboard, at that point all the zones are refreshed per existing behavior.

Note: This behavior change means that opening a minimized dashboard will be slower than in previous releases because the refresh occurs at that point. However, users should see improved response if navigating the system with the dashboard minimized.

Support Ability to Bypass the Home Page when Launching the Application

The system supports launching the system with additional configuration in the URL to automatically navigate to a page or launch a BPA script (or both). When a page is provided (using the 'location' attribute in the URL), the system navigates the user to that page. If a BPA script is also provided, the BPA script is executed after navigation. If a BPA script is supplied with no 'location' attribute, the system navigates to the home page prior to executing the script.

There are use cases where the application should be launched with a script that has logic to determine the appropriate target page. For example, the base script **F1-GotoPrtl** (Navigate to portal for an MO and key values) expects an MO code and primary keys to be supplied. Its logic determines the appropriate portal for this record and then navigates to that record. In this scenario, the system navigates to the user's home page prior to executing the script, which slows down the launching. It is especially problematic for users whose home page loads a lot of information by default.

In this release a new attribute has been provided to skip the navigation to the home page: ***initNav=false***.

The following is an example of a URL with this setting:

```
<system-url>/cis.jsp?script=F1-GotoPrtl&mo=F1-MIGRPLAN&pkValue1=F1-AlgorithmType&initNav=false
```

Support URI Validation and Substitution

The following topics highlight enhancements related to defining a URI (URL, File Path, File URL):

Restrict URI Reference Based on a Property Setting

In this release, the product has introduced the ability to define a whitelist of URI references in the product. A setting in the properties file is used to indicate whether URI references should be validated against the whitelist. The definition of the whitelist is done in a file called ***whiteList.xml***. Refer to the System Administration Guide for more information.

Note: This was also implemented as a hot fix to 4.3.0.3.0.

Implementation of this functionality requires the code to identify the fields that are capturing a URI value and invoke an API to perform this validation both when configuring a field that captures this type of data and at runtime when using the URI. A new extended data type of **URI** has been added for the metadata Field and for the schema element syntax. For records that are business object (BO) driven, the validation of a URI element is automatically provided as long as the element is configured with a **URI** data type either directly or through its Field definition. However, records capturing URI that are not BO driven must include explicit code to call this new API. In all cases the code that uses the URI must be enhanced to invoke this API.

Support the Use of Substitution Variables

In this release, the system provides support to allow fields that capture URIs to referencing a substitution variable for all or part of the URI definition. This allows the system administrators to define the proper URI locations in a properties file whereas the configuration users only need to know the variable name. The name of the XML file that holds the substitution variables is defined as a property setting. The system provides a template to generate a file with the name **substitutionVariableList.xml**. To define a URI substitution, define the name of the parameter and the value. The name may then be used as the variable name surrounded by the symbol @ in configuration.

For example, when defining a location for an extract file in an extract batch job, instead of typing a file path of **h:\oracle\serverName\1.0.0.0\batch\extract**, the batch user can enter **@FILE_EXTRACT@**, assuming there is an entry in the substitution variables file with a name of **FILE_EXTRACT**, and a value of **h:\oracle\serverName\1.0.0.0\batch\extract**. Another example is that the batch user could enter **@BATCH_FILES@\extract**, assuming that the URI variable for **BATCH_FILES** is defined as **h:\oracle\serverName\1.0.0.0\batch**.

Each entry may also indicate whether child components may be added after the parameter name. If the configuration says that it's not allowed, the second example above, for example (**@BATCH_FILES@\extract**) would not be allowed. The default is that child components are allowed.

The product supplies a pre-defined variable name for the location of the CMA files as described in Allow Master Configuration to be Optional. In addition, the 'advanced' menu in the system installation steps may prompt for installers to adjust the value of this pre-defined variable, if desired. Installations may opt to define additional substitution variables for various URI references. Refer to URI Substitution Variables in the planned deprecation section regarding product delivered variables that will be deprecated in a future release. Refer to the System Administration Guide for more information.

Note: This was also implemented as a hot fix to 4.3.0.3.0.

Implementation of this functionality is covered by the API that is mentioned in Restrict URI Reference Based on a Property Setting.

Adjust Zones that Support Drag and Drop

In a previous release, zones that support the configurable column logic (also referred to as "drag and drop") were enhanced to display a trash can image in the column heading. This was meant to support a quick click to remove the column, if desired. Columns were also removable by opening the configuration area, finding the column name and clicking the trash can adjacent to the column name.

In this release the trash can has been removed from the column header. Removing the column continues to be supported using the configuration area.

Limit Height for Large Explorer Columns with a Width Setting

By default, the column width for results in a data explorer zone expands to fit the data. This may be overridden at the column level by configuring a width, which ensures that columns with a large amount of data do not cause a large horizontal scroll. Instead, the data wraps, expanding the output vertically.

In this release a change has been made to columns that include a 'width' configuration to limit the height to about 8 rows of text. If more than 8 rows exist, a scroll bar for that cell is included. This reduces the amount of unnecessary vertical scrolling for the entire set of data.

Configuration Tool Enhancements

This section lists and describes the following enhancements made to the configuration tool:

- UI Hint Sections May Be Configured to 'Float'
- UI Hint Sections May Be Half Width on Maintenance
- Enhance Groovy Scripting Capabilities
- Restrict SQL Functions Based on a Property Setting

UI Hint Sections May Be Configured to 'Float'

In previous releases, a section on the display map rendered in UI hints could be configured as half width, using the values of *left* or *right*. These positions are fixed and for pages where some sections may be hidden under certain conditions. This could produce odd results, such as several *left* sections shown but no *right* sections.

In the release a new option has been added to the *sectionColumn* UI hint: *float*. Sections with this configuration will render on either the left or the right side of the display based on available space. (This is available on *group* and *list* nodes as well).

UI Hint Sections May Be Half Width on Maintenance

In previous releases, a section could be designated as full width or half width (indicating left or right) for a Display map, but not for a Maintenance map. The sections on a Maintenance map were always full width. In this release, a new UI Hint has been provided to allow for a section to be half width for maintenance rendering: *editColumn*. It supports values of *full* (the default), *left*, *right* and *float*. (This is available on *group* and *list* nodes as well).

Enhance Groovy Scripting Capabilities

This section provides details about enhancements to Groovy scripting functionality:

Groovy Library Scripts

In this release, the system has introduced support for creating libraries of common routines and methods written in the Apache Groovy programming language that may be invoked from other scripts.

The following points highlight more information about this enhancement:

- A new script type of **Groovy Library Script** has been added which provides a basis for creating groups of common methods. Scripts of this type must include only Groovy-based step types. The methods defined can accept arguments and return values of any type.
- A **Groovy Library Script** must include a new step type of **Groovy Library Interface** which lists the publically available methods defined within the script.
- The system provides a new public method called **createLibraryScript** which is used to instantiate the interface for a Groovy library and enable other **Groovy Members** step types within the script to invoke any of the library methods.

Note: This functionality is only available to server based scripts which are able to configure Groovy Members steps. Refer to the Big Picture of Server Based Scripts topic in the Defining Script Options chapter of the administration guide for an overview of server scripts.

Ability to Launch Groovy JavaDocs

For system protection, only a subset of system Java classes is accessible to Groovy code. In this release, a Groovy-specific Java Docs viewer is provided to allow users to view only the allowed classes. The viewer may be launched via a new **Groovy JavaDocs** button on the Application Viewer toolbar and also via a link in the context sensitive "Script Tips" dashboard zone.

Ability to View Third Party Whitelist

The system restricts the third party Groovy classes that are accessible from within scripts for the same reasons as it restricts the system Java classes. In this release, the "Script Tips" dashboard zone now includes a link that displays the list of accessible (or "whitelisted") classes.

Restrict SQL Functions Based on a Property Setting

In this release, a property setting has been provided to restrict the functions that may be used when defining an SQL either through a data explorer zone, through a Groovy script or through the Select Records plug-in algorithm for the plug-in driven batch programs. If the setting is enabled, then an error is issued at runtime if there are functions found that are not in the whitelist. The whitelist is documented in the managed content **F1-SQLFunctionWhiteList** (Whitelist of SQL functions). A link to view this whitelist is available in the Tips zone on the zone maintenance page.

Batch Processing Enhancements

This section lists and describes the following batch processing enhancements:

- Individual Security Added to Batch Control
- Additional Support for Ad-hoc Batch Parameters
- Introduce Error Post-Processing Plug-in Spot
- Support for Maintaining / Administering the Oracle Scheduler
- Batch Run Tree - Change Label of Last Update Date

Individual Security Added to Batch Control

In previous releases, an implementation was able to secure which users were able to submit a batch job (i.e. to create a Batch Job Submission entry) and which users were not. However, there was no ability to define more granular controls at the batch control level. In this release, application service has been added to the Batch Control, allowing an implementation to control which users are able to submit which batch controls. The user's security for a batch control's application service is checked when a batch job submission record referencing that batch control is created.

For base delivered batch controls, individual application services have been supplied for each batch control. Note the following for upgrade purposes:

- All user groups that currently have Add security access to the Batch Job Submission application service are granted access to all application services for all batch controls.
- Custom batch controls are updated with the F1-DFLTAPS application service. If implementations wish to provide more granular security for their custom batch controls, they should determine or create an appropriate application service and update the appropriate batch controls.

Additional Support for Ad-hoc Batch Parameters

In this release several enhancements have been included to provide access to ad-hoc batch parameters for various batch related plug-in spots:

Plug-in Driven Batch Programs Support Adhoc Parameters

In this release, the two plug-in driven batch programs provided in the product have been enhanced to allow for ad-hoc parameters to be defined for a given batch control. These parameters are provided to the Select Records algorithm and Process Record algorithm, allowing the algorithms to use this information for processing. Note that the two "template" batch controls provided for these (**F1-PDBG** - Plug-in Driven Generic Template and **F1-PDBEX** - Plug-in Driven Extract Template) have been updated to use higher sequence numbers for the standard "system" parameters and for the extract related parameters. This allows for implementations to enter specific parameters (that are probably more business oriented) to have lower sequence numbers and therefore appear first.

For any adhoc parameters that you wish to use as bind variables for the SQL used to select the records for a plug-in driven batch, your select records plug-in may be used to identify the relevant batch parameter passed as input and populate the output bind variable appropriately. Refer to [Select Records Plug-in Enhanced to Support Field Name for Bind Variables](#) for information about defining a field name when returning custom bind variables for the Select Records plug-in spot.

Additional Parameters Added to Several Batch Plug-in Spots

In this release, several batch control related plug-in spots have been updated to support additional hard parameters:

- Select Records includes the batch control parameters (defined in the parameter collection on the batch control page) as name / value pairs along with the batch code, run number, number of threads and batch business date.
- Process Records includes the batch control parameters (defined in the parameter collection on the batch control page) as name / value pairs along with the number of threads. (This plug-in spot already receives batch code, run number and batch business date.)
- Post-Processing includes the batch control parameters (defined in the parameter collection on the batch control page) as name / value pairs along with the number of threads and the batch business date. (This plug-in spot already receives batch code, and run number.)

Select Records Plug-in Enhanced to Support Field Name for Bind Variables

In a previous release, the Select Records plug-in was introduced to support plug-in driven batch jobs. Algorithms for this plug-in spot define the SQL as the first parameter and in addition, the algorithm can return name / value pairs for defining custom bind variables for the SQL. In this release, the collection of bind variables now includes the appropriate field name (from the CI_MD_FLD table) that provides information about the data type and length. This information is important for the SQL binding logic to properly substitute the values using an appropriate length. Otherwise, the SQL may require 'rtrim' to be included to find the data, which may cause performance issues.

If your implementation has created any custom Select Records plug-in that return specific bind variables as name / value pairs, it is highly recommended that you consider updating the algorithm to provide a field name as well.

Introduce Error Post-Processing Plug-in Spot

In a previous release, a Post-processing system event (plug-in spot) was introduced to support performing a task after all threads for a successful batch job are complete. In this release, a new system event (plug-in spot) has been provided for batch jobs that do not complete successfully. The system event, called **Error Post-Processing**, allows an implementation to configure an algorithm that automatically performs a task when a batch process fails.

Support for Maintaining / Administering the Oracle Scheduler

In this release, several business services have been included to allow implementations to dynamically maintain, monitor and execute application batch processes that are managed by Oracle Scheduler. These are just API's (we are NOT delivering user interfaces). The business services are also exposed as REST API based services for integration with a management console, such as Oracle Enterprise Manager.

Refer to the Server Administration Guide for more information.

Batch Run Tree - Change Label of Last Update Date

On Batch Run Tree, the last update date / time for the most recent batch run is displayed at the top of the page along with the Batch Control and Run information. The label had been Date Time, which is confusing because it may lead a user to associate this date and time with the current run being viewed. To be more explicit, the label has been changed to **Last Update Timestamp**.

Integration Enhancements

This section lists and describes the following integrated oriented enhancements:

- Support for Multiple Security Policies
- Support OWSM Security Policies
- Enhanced the WS-Policy Annotation Type to Allow Direction Override
- Support Password Encryption for Service Catalogue Configuration

Support for Multiple Security Policies

In this release, the system has added support for defining multiple security policies for an inbound web service (IWS).

The following points highlight the changes that were included:

- A sequence has been added to the Inbound Web Service / Annotation list. This allows an implementation to indicate the appropriate order for execution of the annotation policies.
- The base annotation type **F1POLICY** has been updated to include a parent annotation type (**F1POLICIES**). The parent annotation type is used at runtime when multiple annotations are found to properly build the array of annotations.

Support OWSM Security Policies

In this release annotation types have been provide to allow Inbound Web Services to be protected by OWSM security policies. The base product supplies a new annotation type **F1-OWSM** - Annotation for OWSM Security Policy along with a parent annotation type **F1-OWSMS** - Parent for OWSM Policy.

Enhanced the WS-Policy Annotation Type to Allow Direction Override

In this release, the **F1POLICY** annotation type (Annotation for Standard WS-Policy) has been enhanced to expose the 'direction' parameter so that implementations may override the default value, if desired.

Support Password Encryption for Service Catalogue Configuration

The master configuration record Service Catalogue Configuration (**F1-ServiceCatalogConfig**) allows for an implementation to configure one or more subordinate servers along with authentication details (user / password). In this release support has been added to allow the password to be encrypted using the standard system support for encryption. Additional configuration is needed to define the Encryption feature configuration to fully support this functionality. Refer to the online help for service configuration for more details.

Configuration Migration Assistant (CMA) Enhancements

This section lists and describes the following enhancements made to the CMA functionality:

- Allow Master Configuration to be Optional
- Provide Additional Event Driven Batch Events
- Automatically Transition to Apply Transactions if Possible
- Ability to Indicate that No Approval is Needed
- Adjust Retry Logic
- Ability to Migrate Individual Messages

Note: The product is continuing to find ways to streamline the overall CMA process; reducing steps and increasing the ability to automate various steps.

Allow Master Configuration to be Optional

In this release, the product has been enhanced to provide default values for the information configured on the Migration Configuration Assistant master configuration record. This allows an implementation to reduce the number of steps when provisioning a new environment that uses CMA to import new records.

The change relies on default export and import directories to be defined using the [Substitution Variables](#), with the variable name **@F1_CMA_FILES@**. The system will default the export directory **@F1_CMA_FILES@\export**. The system will default the import directory to **@F1_CMA_FILES@\import**.

The file suffix is now defaulted to '*cma*' if not configured on the master configuration. This has been the recommended value.

Enhance Migration Request to Facilitate Migration Requirements

This release includes several enhancements to the migration request to support common requirements for defining records to migrate. To support the enhancements, two new fields have been added to Migration Request to allow categorization / classification of the migration request records:

- Migration Request Class - this is an internal field that is used to support the new business objects that are described in subsequent sections below.
- Migration Request Category - this is an extendable lookup field and is provided to allow for the product or an implementation to categorize the migration request to aid in searching. The product provides one value as base: **Accelerator**. This may be used for migration requests that are defined to include data that is part of an accelerator. Records may be configured to indicate that a reference ID is required. However, that only applies to Entity List migration requests. (See subsequent topic.)

These fields have been added as search criteria to the migration request search zone.

Introduce a Migration Request BO Specific to a List of Entities

A common use case for migration of data is to copy a specific list of records (entities) that are associated with a particular enhancement or 'sprint' or release. Rather than using selection criteria for a migration request instructions (which are useful for a "bulk" migration), users often prefer to explicitly list records. The Migration Request business object provided in a previous release allows a user to define specific keys. However, the user interface is not very friendly.

In this release enhancements have been provided to facilitate defining a migration request with an explicit list of records. The following points highlight what is provided for this functionality:

- A new migration request business object has been provided: Entity List Migration Request (**F1-EntityListMigrationRequest**). It is similar to the business object provided in a previous release (F1-MigrReq). However, its user interface only supports defining records explicitly. In addition, its user interface uses Maintenance Object rather than Migration Plan as the driver. The migration plan to use for the instructions is derived using an option on the maintenance object. Records created with this business object are assigned the migration request Class value of **Entity List**.
- A special zone has been provided for the migration request portal for **Entity List** migration requests to add records to the request. This zone is dynamic. The user chooses a maintenance object and other filter criteria to get a list of objects. One or more objects may be selected for inclusion into the migration request. The user may provide a reference ID to associate with the records along with comments.
- A special zone has been provided for the migration request portal for **Entity List** migration requests to view and remove records linked to the request.

As part of this enhancement, the F1-MigReq business object has been enhanced as follows:

- Its description has been changed to **Criteria-based Migration Request**. This migration request is still useful for migration requests that select records based on selection criteria or selection algorithms or specific keys or a combination of any of the three.
- Records created with this business object are assigned the migration request Class value of **Criteria-based**.

Note: This business object has not been enhanced to allow for a reference ID or comments.

Introduce the Ability to Group Migration Requests

In this release, Migration Request has been enhanced to support referencing one or more other migration requests. This allows for a product or an implementation to define separate migration requests that represent logical groupings of migration plan instructions for ease of maintenance, but to combine all the separate migration requests into a single "grouped" migration request for streamlined export / import purposes. Multiple levels of grouping are supported. In other words, one migration request may reference multiple migration requests, which in turn are grouping other migration requests.

The following enhancements are included to support this functionality:

- A new migration request business object has been provided: Group Migration Request (**F1-MigrationRequestGroup**). Records created with this business object are assigned the migration request Class value of **Group**. The product does not supply any business object that supports defining a combination of migration plan instructions and migration request references.
- The migration request search includes a new option to search by a referenced migration request.
- The migration request maintenance portal now includes a zone that appears if the migration request being maintained is referenced in a separate migration request. This zone lists the migration requests that reference this one.

In addition, the Framework product delivers a new Group migration request called Framework Configuration (**F1-FrameworkConfig**) to aid in wholesale migrations. This migration request groups other framework delivered migration requests. Some of these migration requests are also new to this release.

- General System Options (**F1-GeneralSystemOptions**). This is an existing migration request. It includes most of the administration tables in framework that are considered more business oriented (rather than system configuration oriented). Refer to [New/Updated Migration Plans/Migration Requests](#) for details of changes to this migration request.
- Framework Integration Configuration (**F1-IntegrationConfig**). This is a new migration request. It includes all the configuration tables that are used to define integrations with other systems. Refer to the migration request for more information.

- Migration Admin (**F1-MigrationAdmin**). This is an existing migration request. It includes the CMA configuration records (migration plan and migration request).
- Security Configuration (Without Users). (**F1-SecurityConfigWithoutUsers**). This is a new migration request. It includes all the security configuration tables, but does not include the user configuration. Refer to the migration request for more information.
- Framework System Configuration (**F1-SystemConfig**). This is a new migration request. It includes all the configuration tables that are considered "system" data or "configuration tools" data. Refer to the migration request for more information.

Edge products and / or implementations may choose to include the **F1-FrameworkConfig** migration request into another grouping migration request so that framework objects are included in a migration without having to explicitly list them. This ensures that in the future, when new framework administration tables are introduced and included in one of the migration requests referred by **F1-FrameworkConfig**, no additional configuration is needed by edge products or implementations to start migrating that data.

Provide the Ability to Mark Objects as Approved, Rejected or Needs Review En Masse

In this release, the following zones have been enhanced to allow for updating objects en masse to Approved, Rejected or Needs Review:

- On the **Migration Data Set Import** portal, the **Migration Data Set Impacted Object Summary** zone now includes the multi-select actions of Approve, Reject and Needs Review.
- On the **Migration Transaction** portal, the **Migration Transaction Objects** zone now includes the multi-select actions of Approve, Reject and Needs Review.

In addition, the **Migration Data Set Objects in Error** zone on **Migration Data Set Import** provides the ability to Reject one or more records.

Provide More Detail for a Completed Migration Data Set Import

In a previous release, when a Migration Data Set Import has finished all its tasks, its status was set to Applied, even if some of the migration objects were in a status of **Cannot Apply**. In this release some enhancements have been done to provide more information for a user reviewing the results of an import:

- The description of the final status (APPLIED) has been changed from Applied to Completed.
- The Completed status is configured to support an optional Status Reason. The product supplies two base Status Reason values for this BO for the Completed state:
 - F1-NO-OBJ-APPL - No Objects Applied
 - F1-SOME-NOT-APPL - Some Objects Not Applied

- The algorithm that transitions a Migration Data Set Import record to the Completed status will review the status of the related migration objects and populate the status reason, if applicable. If all objects are in the Cannot Apply state, it populates a Status Reason of 'No Objects Applied'. If some objects are in the Cannot Apply state, it populates the Status Reason of 'Some Objects Not Applied'. If no objects are in this state then the status reason is not populated.
- The display of a Migration Data Set Import record now includes the counts of Applied Objects and the number of objects in the Cannot Apply state.

Note: This functionality was made available in 4.2.0.3.0 as a hot fix using bug 23228369.

Enhance the Information for Migration Data Set Import

Previously, the Migration Data Set Import's information string only showed the ID of the data set. In this release, the information string has been enhanced to include the Export description, the Status description, the status reason description (if populated) and the creation date and time.

Note: This functionality was made available in 4.2.0.3.0 as a hot fix using bug 23228369.

Enhance the Migration Data Set Import Query Results

In this release the results of the migration data set queries have been adjusted:

- The separate columns for migration data set id, status and export description have been consolidated into one column showing the migration data set import information string (that now includes all these fields). This column has been enabled to include the worklist capability.
- The Status Date/Time and Export Date/Time columns have been removed.
- New columns have been added showing various counts: number of Applied objects, number of objects in the Cannot Apply state and the number of objects that are Unprocessed (still in a non-final / non-rejected state).

Enhance the Migration Data Set Detail Zones

In this release the zones on the Migration Data Set Import portal that show the Transactions and the Objects linked to the data set have each been enhanced to only show records in a non-final state by default. The existing user filter for Status has been enhanced to include an entry for limiting to non-final states as well as an entry to show records in all status values. This allows a user to choose to limit the search to records in a given state, or all states or to return to the default option of only non-final states.

Support for Migrating Individual Lookup Values

In previous releases, the system supported migrating a Lookup and all its values. In this release, support is provided to migrate individual lookup values. To support this, a new Lookup Value MO has been provided. Along with that a migration plan to migrate specific lookup values has been provided.

Note: This migration plan has not been included in any base migration requests as they are meant for "wholesale" migrations whereas this new migration plan is expected to be used for migrations that target an explicit list of records.

Miscellaneous Enhancements

This section lists and describes the following miscellaneous enhancements:

- Introduce New Business Service to Interrogate Warnings
- Changes to Batch and User Logging

Introduce New Business Service to Interrogate Warnings

The way the system handles warnings to an online user is that warnings are accumulated and issued altogether and the end of all the processing. All the updates are rolled back at this point. If the user Cancels, no further processing is needed. If the user clicks OK, all the processing is re-executed and all warnings are ignored.

For programs that perform logic that cannot be rolled back (such as sending a real-time message to an external system), ideally the logic should check to see if warnings are being accumulated and only perform the logic if warnings have not been accumulated. I.e., the logic should only occur once the user has clicked OK.

An API in Java exists for programs to check this condition. In this release a new business service has been provided to expose this information. The business service is ***F1-CheckWarning***.

Note: Processing that cannot be rolled back should be the last possible step in a logical transaction because there is no way to know if a warning may be issued after the logic is performed.

Changes to Batch and User Logging

In this release, the system has been enhanced to limit the information that is captured in the logs that are visible by a user to suppress the information that is proprietary to the system. In addition, information that is captured in a more technical log that is reviewed by a system administrator suppresses customer data such as bind variables. Refer to *Oracle Revenue Management and Billing Server Administration Guide* for details of the formats.

System Data Enhancements

This section lists and describes the system data which is newly added and updated in Oracle Utilities Application Framework Version 4.3.0.4.0. It contains the following topics:

- New System Data
- System Data Update

New System Data

This section provides information about new system data delivered in this release that may need to be reviewed for possible impact by implementations.

New/Updated Application Services

The following application services were added or updated. Please review and determine which user groups, if any should be granted access to the application service/access mode.

Application Service	Description	Access Modes	Comments
F1-ARQPR	Request Monitor	E	Added for Individual Security Added to Batch Control .
F1-AVALG	Application Viewer - Extract Algorithms	E	Added for Individual Security Added to Batch Control .
F1-AVBT	Application Viewer - Extract Batch Control	E	Added for Individual Security Added to Batch Control .
F1-AVMO	Application Viewer - Extract MOs	E	Added for Individual Security Added to Batch Control .
F1-AVTBL	Application Viewer - Extract Table data	E	Added for Individual Security Added to Batch Control .
F1-AVTD	Application Viewer - Extract To Do Types	E	Added for Individual Security Added to Batch Control .
F1-BFCRL	ILM Crawler - Business Flag	E	Added for Individual Security Added to Batch Control .
F1-BSFLG	Business Flag Monitor	E	Added for Individual Security Added to Batch Control .
F1-BUNPR	Bundle Monitor	E	Added for Individual Security Added to Batch Control .
F1-DTDOM	Outbound Message Error To Do Entry Cleanup	E	Added for Individual Security Added to Batch Control .
F1-FCTRN	Fact Monitor	E	Added for Individual Security Added to Batch Control .
F1-FKVBP	Foreign Key Validator	E	Added for Individual Security Added to Batch Control .
F1-FLUSH	Flush All Caches	E	Added for Individual Security Added to Batch Control .
F1-ILMIN	ILM Crawler Initiator	E	Added for Individual Security Added to Batch Control .

Application Service	Description	Access Modes	Comments
F1-LANG	New Language	E	Added for Individual Security Added to Batch Control .
F1-LDAP	LDAP Import	E	Added for Individual Security Added to Batch Control .
F1-LKPIL	Standard Lookup Initial Load	E	Added for Individual Security Added to Batch Control .
F1-MGDIM	Migration Data Set Import Monitor	E	Added for Individual Security Added to Batch Control .
F1-MGDPR	Migration Data Set Export Monitor	E	Added for Individual Security Added to Batch Control .
F1-MGOAP	Migration Object Monitor – Apply	E	Added for Individual Security Added to Batch Control .
F1-MGOPR	Migration Object Monitor	E	Added for Individual Security Added to Batch Control .
F1-MGTAP	Migration Transaction Monitor – Apply	E	Added for Individual Security Added to Batch Control .
F1-MGTPR	Migration Transaction Monitor (Deferred)	E	Added for Individual Security Added to Batch Control .
F1NAVEMP	Launching Application	R	Special portal for Support Ability to Bypass the Home Page when Launching the Application .
F1-NDPUR	Notification Download Purge	E	Added for Individual Security Added to Batch Control .
F1-ORCRL	ILM Crawler - Object Revision	E	Added for Individual Security Added to Batch Control .
F1-OUCL	ILM Crawler - Outbound Message	E	Added for Individual Security Added to Batch Control .
F1-PDBEX	Plug-in Driven Extract Template	E	Added for Individual Security Added to Batch Control .
F1-PDBG	Plug-in Driven Generic Template	E	Added for Individual Security Added to Batch Control .
F1-REQTY	Request Type Monitor	E	Added for Individual Security Added to Batch Control .
F1-RETRCMASETTINGSSC	Retrieve CMA Configuration BS	E	Added for a new business service that may be used to retrieve CMA master settings.

Application Service	Description	Access Modes	Comments
F1-REVPR	Object Revision Monitor	E	Added for Individual Security Added to Batch Control .
F1-SAKRQ	Sync Request Allocate Keys Monitor	E	Added for Individual Security Added to Batch Control .
F1-SICRL	ILM Crawler - Inbound Sync Request	E	Added for Individual Security Added to Batch Control .
F1-SRCRL	ILM Crawler - Sync Request	E	Added for Individual Security Added to Batch Control .
F1-SRLRQ	Sync Request Load Records Monitor	E	Added for Individual Security Added to Batch Control .
F1-STATSM	Statistics Control Monitor	E	Added for Individual Security Added to Batch Control .
F1-STCRL	ILM Crawler - Service Task	E	Added for Individual Security Added to Batch Control .
F1-STKDF	Service Task Monitor (Deferred)	E	Added for Individual Security Added to Batch Control .
F1-STKTR	Service Task Monitor	E	Added for Individual Security Added to Batch Control .
F1-SUBRQ	Request Monitor (Deferred)	E	Added for Individual Security Added to Batch Control .
F1-SYNEF	Sync Request Extract	E	Added for Individual Security Added to Batch Control .
F1-SYNIL	Sync Request Initial Load	E	Added for Individual Security Added to Batch Control .
F1-SYNRQ	Sync Request Monitor	E	Added for Individual Security Added to Batch Control .
F1-SYSRQ	Sync Request Monitor (Deferred)	E	Added for Individual Security Added to Batch Control .
F1-TDCRL	ILM Crawler - To Do Entry	E	Added for Individual Security Added to Batch Control .
F1-TDEER	To Do Entry External Routing	E	Added for Individual Security Added to Batch Control .
F1-TDPG	Purge Completed To Do Entries	E	Added for Individual Security Added to Batch Control .
F1-XMLPG	XAI Upload Staging Records Cleanup	E	Added for Individual Security Added to Batch Control .

New/Updated Migration Plans/Migration Requests

Migration Plans have been added for the following maintenance objects:

- ETL Mapping Control (**F1-ETLMappingControl**)
- Installation Options (**F1-InstallationOptions**). Note that in a previous release, the product supported installation algorithms only. This migration plan allows for copying of main fields on installation, the algorithm collection and the messages collection. In addition, this migration plan includes a pre-compare algorithm that retains the value of the Environment ID and the License Key for the target installation record.
- Lookup Value (**F1-LookupValue**). This is for the functionality described in this topic: [Support for Migrating Individual Lookup Values](#).
- Performance Target Type (**F1-PerformanceTargetType**)
- Performance Target (**F1-PerformanceTarget**)
- Statistics Control (**F1-StatisticsControl**)
- User Group - without users (**F1-UserGroupWithoutUsers**). In previous releases we had supplied a migration plan for User Groups that includes all collections for the user group. This migration plan allows an implementation to move a user group and its application service configuration without copying users (that may not be valid in the target region).
- Message Options (**F1-MessageOption**).
- JMS Queue (**F1-JMS-Queue**).
- JMS Topic (**F1-JMS-Topic**)
- JNDI Server (**F1-JNDI-Server**)

The following changes were made to the General System Options migration request (**F1-GeneralSystemOptions**):

- Migration plans for the following MOs were added:
 - Attachment
 - Bucket Configuration
 - Characteristic Type
 - ETL Mapping Control
 - Extendable Lookup
 - Installation Options
 - Managed Content
 - Performance Target
 - Performance Target Type

- Report Definition
- Request Type
- Service Task Type
- Statistics Control
- To Do Type
- Migration plans for the following MOs were removed:
 - Installation Algorithms

Technical Recommendations

To improve the overall batch performance on Windows and Linux platforms, we recommend you to make changes in the following files:

File Name	Change From	Change To
hibernate.properties	hibernate.c3p0.timeout = 300	hibernate.c3p0.timeout = 600
threadpoolworker.sh	MEM_ARGS="-Xms512m -Xmx1024m -XX:MaxPermSize=768m"	MEM_ARGS="-Xms512m -Xmx4096m -XX:MaxPermSize=768m"

Supported Upgrades

At present, we support upgrade from Oracle Revenue Management and Billing Version 2.5.0.3.0 to 2.6.0.0.0. For more information on how to upgrade, refer to the following documents which are available on OTN:

- *Oracle Revenue Management and Billing Version 2.6.0.0.0 Upgrade Guide*
- *Oracle Revenue Management and Billing Version 2.6.0.0.0 Upgrade Path Guide*

For upgrading from any other version of Oracle Revenue Management and Billing other than 2.6.0.0.0, consult with Oracle Support, Oracle Partner, or Oracle Consulting that may be supporting your implementation and upgrade process.

Deprecated Notices for OUAF Version 4.3.0.4.0

This section describes items that are deprecated in this release or planned for deprecation in a future release of Oracle Utilities Application Framework. It contains the following topics:

- Deprecated Functionality in This Release
- Deprecation Planned for Future Releases
- Deprecated Objects for Future Releases

Deprecated Functionality in This Release

The following functionality is deprecated in this release:

- Support for Abbreviated Time Zone Names

Support for Abbreviated Time Zone Names

The time zone page includes a drop down for defining a Time Zone Name. In previous releases, the list includes many three-digit "abbreviated" time zone names. However, their use is deprecated because the same abbreviation is often used for multiple time zones (for example, "CST" could be U.S. "Central Standard Time" and "China Standard Time"), and the Java platform can then only recognize one of them.

Upgrade Note: Please review your time zone records and set the Time Zone name to an appropriate valid value.

Deprecation Planned for Future Releases

The following features or items are scheduled to be removed in a future release of Oracle Utilities Application Framework:

- URI Substitution Variables
- CMA Migration Requests
- CMA Import Algorithm
- BO Read in F1-MainProc when Pre-Processing Exists
- Desupport of Embedded Installation

URI Substitution Variables

In a previous release several variables were provided out of the box however, no product functionality was using them. In a future release these variables will no longer be delivered as it was deemed confusing to supply variables that were not related to specific product functionality. The following variables will no longer be delivered:

- F1_BI_EXTRACTS
- F1_INTERNAL_FILES
- F1_CUST_APP_BASE
- F1_PROCESS_DIR
- F1_SVC_CATALOG_WSDL_DIR
- F1_PDB_EXTRACTS

The suggestion for implementations is to not use any of the above names. Rather CM variable names should be used.

CMA Migration Requests

The migration requests F1-FrameworkAdmin (Framework Admin) and F1-SchemaAdmin (Schema Admin) are no longer recommended and are not going to be updated with new administration / control tables in future releases. The product may deprecate them in a future release.

CMA Import Algorithm

In a future release the CMA Import algorithm plug-in spot will be deprecated. Please review any existing algorithms and create appropriate Pre-Compare algorithms instead.

BO Read in F1-MainProc when Pre-Processing Exists

In the original implementation of configuration tools, if a pre-processing script was linked to the BO via options, the main framework maintenance BPA (F1-MainProc) would not perform a Read of the BO, leaving it to the responsibility of the pre-processing script.

In a subsequent release, to solve a UI Hints issue related to child BOs, a BO Read was included in F1-MainProc even if a pre-processing script existed. This solution introduced a problem only visible for specific scenarios and a different fix has been introduced. In the meantime the BO Read is no longer necessary in F1-MainProc. Because there are many pre-processing scripts that are properly performing the Read of the BO, ideally the BO Read should be removed from F1-MainProc so that multiple reads are not performed.

However, there may have been pre-processing scripts introduced after the BO Read was included in F1-MainProc that were coded to not perform a BO read in the pre-processing script. Because of this situation, the BO Read is still performed as part of the processing of F1-MainProc.

The product plans to remove the BO Read from F1-MainProc logic when a pre-processing script exists. Please review your custom pre-processing scripts that are linked to your BO options to ensure that it properly performs a Read of your BO.

Desupport of Embedded Installation

WebLogic 12.1.3 is currently supported for both embedded and native installations. In future releases of the FW, using a later version of WebLogic, for example 12.2.*, embedded installations will be not be supported. Only the native installation will be supported.

Deprecated Objects for Future Releases

The following is planned to be deprecated in this release:

- Planned System Data Deprecation

Planned System Data Deprecation

The following system data is planned to be deprecated in this release:

- Environment Reference. This administrative maintenance object was related to ConfigLab and Archiving, which are no longer supported. In a future release, the following will be removed:
 - Migration Plan **F1-EnvironmentRef**. Note that no base migration request references this plan. Implementations should ensure that no custom migration request references this plan.
 - Business Object **F1-EnvironmentRefPhysicalBO**
 - Maintenance Object **ENV REF**
- The To Do Type **F1-SYNRQ** (Sync Request Error) is not in use and will be deleted in a future release. Errors for the Sync Request Monitor (that also has the name **F1-SYNRQ**) are reported using the To Do Type **F1-SYNTD** (Sync Request Monitor Errors).
- The following algorithm types and algorithms provided for the current LDAP import functionality do not include any logic. They will be removed in a future release.
 - Algorithm Type / Algorithm **F1-LDAPIMPRT**
 - Algorithm Type / Algorithm **F1-LDAPPREPR**
- The lookup value **CHAR_ENTITY_FLG / F1SE** (Characteristic Entity / Sync Request Inbound Exception) is not in use and will be removed in a future release.
- The database tables **F1_IWS_SVC_OPER_L**, **F1_IWS_ANN_CHAR** and **F1_IWS_ANN_TYPE_CHAR** will be removed in a future release.

Deprecation Notices for ORMB Version 2.6.0.0.0

This section describes items that are deprecated in this release or planned for deprecation in a future release of Oracle Revenue Management and Billing. It contains the following topics:

- Deprecated Functionality in This Release
- Deprecation Planned for Future Releases

Deprecated Functionality in This Release

None of the features are deprecated in this release.

Deprecation Planned for Future Releases

The following features are scheduled to be removed in a future release of Oracle Revenue Management and Billing:

- **TOU (Variance Parameter) Based Pricing** – We strongly recommend you to use the multi parameter based pricing feature instead of the TOU based pricing feature.
- **Billable Charge Creation Using UOM** – At present, there is one-to-one relationship between UOM and price item. Therefore, you are able to create a billable charge using either UOM or price item. In a future release, the system will not allow you to search price item pricing using UOM. Therefore, we strongly recommend you to create pass through or service quantity based billable charges using price item.
- **Legacy mechanism to upload pass through billable charges using the BCU1 and BCU2 batches** - We have introduced the **On Demand Billing feature which allows you to upload both pass through and rate based billable charges**. We strongly recommend you to start using the On Demand Billing feature for uploading pass through and rate based billable charges.
- **XAI Inbound Services** - This has already been superseded by the Inbound Web Services functionality. For more information on migrating from XAI to IWS, please refer to *Migrating from XAI to IWS Oracle Utilities Application Framework* (Doc ID 1644914.1) on [My Oracle Support](#).

The following table lists the objects which will be deprecated in the next release of Oracle Revenue Management and Billing:

Object Type	Object Name
Algorithm Type	C1_CURALG, C1-MDOV-BILL, C1-MDOV-BSEG, C1-MDOV-ONSA, SA_DERV_POPC
Feature Configuration	C1_EX_ROUND
Option Types	Currency Conversion Algorithm and Payment Distribution To-Do (from the C1_MLTCURACC feature configuration)
Table Columns	FILE_NAME, UPLD_FLTY_CD, and ACCESS_GRP_CD columns from the CI_BCHG_HSTG table BILL_RTE_TYPE_CD, RECEIVE_COPY_SW, BILL_FORMAT_FLG, NBR_BILL_COPIES, CUST_PO_ID, NOTIFY_SW, and BILL_ADDR_SRCE_FLG columns from the CI_ACCT_PER table
Batch Control	GLASSIGN
View	CI_EFF_ACCT_PRICING_VW, CI_EFF_PER_PRICING_VW
Business Service	C1-EffectivePricing, C1_PriceParmBS Note: Instead of using the C1-EffectivePricing business service, use the C1-GetEffectivePricing business service to view the data on the Pricing (Account) and Pricing (Person) screens. Similarly, instead of using the C1_PriceParmBS business service, use the C1_PRICE_PARM business object to add, edit, copy, and delete a parameter.
Service Program	EFFPRCSERVICE, C1_PRICEPARM
Screen	Banking Control Central, View Account Contracts Information, View Account Financial Transaction History, Account Payment Summary, View Accounts of Person, Control Central

Therefore, henceforth, we strongly recommend you not to use these objects in any custom implementation.

Product Documentation

User manuals and other technical documents are available in the Portable Document Format (PDF). You can download Oracle Revenue Management and Billing release specific documentation library (for example, Oracle Revenue Management and Billing Version 2.6.X.X.X Documentation Library) using the following URL:

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

Media Pack Download

Oracle Financial Services Revenue Management and Billing Version 2.6.0.0.0 and Oracle Insurance Revenue Management and Billing Version 2.6.0.0.0 media packs can be installed on the following supported platforms:

- Windows (Microsoft Windows 64-bit)
- Linux (Linux 64-bit)

The media pack includes multiple packages. For more information, refer to the Media Pack Contents section in the *Oracle Revenue Management and Billing Version 2.6.0.0.0 Quick Installation Guide*.

To download a package from a media pack:

1. Login to [Oracle Software Delivery Cloud](#).
2. Type **Oracle Financial Services Revenue Management and Billing** or **Oracle Insurance Revenue Management and Billing** in the **Search By** field.
3. Click **Select Platform**. A window appears which lists all supported platforms.
4. Select the required platform check box and then click **Select**. A row appears in the **Selected Products** list.
5. Click **Continue**. A page appears with the most recent release of the product.

Note: If you want to use any previous release of the product which is available on Oracle Software Delivery Cloud, use the **Select Alternate Release** link.

6. Click **Continue**. A window appears with the license agreement.
7. Scroll and read the full license agreement and then click 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 **File Download** window appears.
9. Select the required package that you want to download from the media pack and then click **Download**. The **Download Manager Installation** window appears.
10. Click **Download the installer**. A message appears confirming whether you want to open or save zip file.
11. Select the **Save as** option from the **Save** list. 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.

Bug Fixes

The following table lists the bugs that are fixed in this release:

Bug Number	Copy of	Description
26003089	25918776	ACCOUNT FINANCIAL HISTORY NOT DISPLAYING AP ADJUSTMENTS AS SEPARATE LINE ITEMS
25907686	25701358	APAY NOT GETTING STAMPED ON BILL IF A PENDING PAYMENT HAS MULTIPLE PAYMENTS DUE
25907493	25816278	PAYMENT DISTRIBUTION CREATING WPAYDIST ADJUSTMENT EVEN THOUGH NOT CONFIGURED FOR
25902323	25692909	UNABLE TO CALL BASE'S CONTRACT TYPE POST PROCESSING ALGO (C1-GENBSEGPA) THRU CUS
25883164	23604905	UNABLE TO DELETE PRICE ITEM
25803722	25698262	CURRENCY CODE IS MISSING ERROR OCCURS WHEN RUNNING BILLING
25492953	25392509	PAYMENT EVENT: THIS PAYMENT EVENT QUALIFIES FOR BATCH PROCESSING. NO VALID BATCH
25492938	25392664	PEPL2: OVERPAYMENT SECTION OF PAYMENT EVENT REMAINS IN FREEZABLE STATUS
25481163	25449559	WHY PAYMENT CAN BE CREATED ON CANCELLED TENDERS
25391986	25304424	{CLOUD}ORMB BATCH JOB APAYDSFR IS GETTING INTO ERROR IN UAT ENV
25365290	25211133	PAYMENT QUICK ADD IS NOT WORKING
25364218	25200696	HEADER VALIDATION BATCH MODIFIED TO ACCEPT ALL HEADER_TXN_VOL VALUES
25359038	25295459	LTRPRT BATCH KEEPS IN PENDING STATUS
25358549	25129312	BALAPY ERROR: A NON-ZERO CODE WAS RETURNED FROM CALL TO COBOL BATCH PROGRAM CIPP
25358499	25106089	ORMB - MAXIMUM NUMBER OF OPEN BILL CYCLES WAS REACHED
25358386	25162628	PAYMENT NOT GETTING DISTRIBUTED FOR LARGER BILL(15K+BILL SEGMENTS)
25358161	25223731	ALGORITHM SPOT INTERFACE(JAVA AND PLUGIN) NOT AVAILABLE FOR THE CONTRACT TYPE
24496625	-	EMAIL ID SHOULD HAVE THE STANDARD VALIDATION OF @ IN THE CUSTOMER/ACCOUNT SCREEN

Bug Number	Copy of	Description
24481339	-	ORMB APPLICATION_APPROVER PROFILE NOT TAKING ZERO
20645557	-	COLOR CODING ISSUE ON APPROVAL SCREEN - ADDING CHARACTERISTICS TO AN ACCOUNT
14392613	-	BANKING CONTROL CENTRAL DOESN'T SEARCH THE ACCOUNTS IF ACCOUNT TYPE CHAR NOT SET
25984485	25928676	MULTIPLE CI_AGG_PARM_GRP_DTL RECORDS FOR THE SAME PARM_STR.
25959447	25888817	C1-TXNVP ERROR CASCADES TO OTHER TRANSACTIONS WITHIN CHUNK.
25949649	25891271	UNABLE TO CONFIGURE DEFERRED STATUS IN REFUND REQUEST DUE TO HARDCODED STATUS
25923895	25474573	CHANGING DESCRIPTION OF INVOICE POST PROCESSING ALGORITHM
25800256	25473475	PRICE LIST SEARCH NOT WORKING IF SEARCH ZONE IS OVERRIDDEN BY CUSTOM SEARCH ZONE
25761459	25185900	IAENT JOB IS DISAGGREGATING TRANSACTION IN CANCELLED BILLABLE CHARGES
25761347	25555518	BILLABLE CHARGE NOT BEING CREATED SUCCESSFULLY FOR TRANSACTIONS.
25756387	25735025	DISAGGREGATION BATCH (C1-DARSU) IS GOING INTO ERROR
25722481	25636861	UPDATE STATUS (C1-TXNEX) PROCESS RUNNING LONG
25524994	25467293	INCORRECT CURRENCY CODE FOR DIVISION AMOUNT DISPLAYED ON FINANCIAL TRANSACTIONS
25501590	25417751	BALANCE IN ACCOUNT INFORMATION IS GETTING DISPLAYED IN DOLLAR \$ INCORRECTLY
25383791	25329155	BASE RULE BUSINESS SERVICE OUTPUT NODE HAS INVALID VALUE.

Known Issues

This section lists the known issues in Oracle Revenue Management and Billing Version 2.6.0.0.0 along with workarounds available to handle these issues. The known issues are grouped into the following categories:

- Banking
- Insurance
- Documentation

Banking

Issue	TRANSACTION AGGREGATION: INCORRECT RESULTS WHEN BATCHES NOT EXECUTED IN SEQUENCE
Description	During the transaction aggregation process, you need to execute batches in the specified order (as stated in the user manual). If you do not follow the sequence, erroneous results may occur.
Workaround	None

Issue	THE FEED MANAGEMENT BATCHES CANNOT RUN CONCURRENTLY
Description	You cannot execute the transaction feed management batches concurrently.
Workaround	None

Issue	SEARCH RESULT FOR EXCHANGE RATE NOT DISPLAYED CORRECTLY
Description	Searching for the lowest precision rate (0.000000000000000001 / 0.0000000000000000011 / 0.0000000000000000023) from the Search Exchange Rate zone results in displaying the rate in exponential format "1E -18".
Workaround	None

Issue	VALIDATION RULES FOR ADHOC CHARACTERISTIC TYPES ARE NOT TRIGGERED IN THE MANAGE PRODUCTS, MANAGE PRICE LISTS, ADD PRODUCT PRICING, OVERRIDE PRODUCT PRICING, AND EDIT ASSIGNED PRICING SCREENS
Description	When you associate adhoc characteristic types with a product, price list, and a price assignment, validations defined for adhoc characteristic types are not triggered in the Manage Products, Manage Price Lists, Add Product Pricing, Override Product Pricing , and the Edit Assigned Pricing screens.
Workaround	None

Issue	UNABLE TO CHANGE THE DIVISION STATUS FROM ACTIVE TO RETIRED
Description	When the approval workflow functionality is enabled, the status of a division will not get changed from Active to Retired .
Workaround	None

Issue	LOCALIZATION ISSUE WHEN MAKER AND CHECKER CHOOSE DIFFERENT LANGUAGES
Description	When a maker and checker operate in different languages, a maker cannot see the approved transactions.
Workaround	Maker should login with a language that checker is using to see the approved transactions.

Issue	PRE-VALIDATION ERROR MSG FOR INVOICING GROUP EVEN IF PRE-VALIDATION IS OFF
Description	If you set the Pre-validation flag for both the groups (that is, C1IGADD and C1IGUPD) to N , the validation will still be triggered before the approval workflow request is created.
Workaround	None

Issue	ACCOUNT IDENTIFIER MANDATORY SWITCH NOT WORKING
Description	If the Account Identifier Required option type of the C1_ACCTINFO feature configuration is set to Y , you will not be able to use the Add Account and Start Service feature available in the Person screen.
Workaround	None

Issue	BILLABLE CHARGE – PRICING INFO TAB, PRODUCT AND SUB-UOM DESCRIPTION IS NOT SHOWN
Description	When you specify the product and TOU (issue currency) code in the Pricing Information tab of the Billable Charge screen, the description of the product and TOU does not appear corresponding to the respective fields.
Workaround	None

Issue	CHARS GENERATED ON BILL SEGMENTS EVEN IF C1_EX_ROUND FEATURE CONFIG IS SET TO NO
Description	The Exchange Rate characteristic type appears in the Bill Segment Calc Line Characteristics screen even if the Feature Config for Conversion option type of the C1_EX_ROUND feature configuration is set to N . This happens only when the bill segment creation algorithms are created using the BS-CRE-PRICE and C1-GENBSEGPA algorithm types.
Workaround	None

Issue	FOREIGN KEY AND FILE LOCATION CHARACTERISTIC TYPE NOT SUPPORTED IN UI MAPS
Description	The screens created using the UI map do not support the Foreign Key Value and File Location Value characteristic types. These screens only support the Adhoc Value and Predefined Value characteristic types.
Workaround	None

Issue	GETTING SERVER ERROR WHILE DELETING A DIVISION (ASSOCIATED WITH A PRODUCT)
Description	The system does not allow you to delete a division which is associated with a product (even if the division is not yet used in the system).
Workaround	In such case, you can first remove the product from the division and then delete the division.

Issue	MESSAGE DOES NOT APPEAR ON CLICKING BUTTONS IN LIST OF PRICE ASSIGNMENTS ZONE
Description	On approving, rejecting, or canceling one or more price assignment requests (at once) from the List of Price Assignments zone, the appropriate message does not appear when you click the Accept Changes , Return to Submitter , or the Revert to Original button.
Workaround	None

Issue	VIEW RULE TYPE SCREEN - PERFORMANCE ISSUE
Description	If you define a transaction record type with the maximum accounts to be charged set to 5, maximum products to be mapped set to 10, and the maximum product parameters set to 15 and view the details of the rule type, you might experience delay in loading the View Rule Type screen.
Workaround	None

Issue	C1-TXCNC BATCH GETS EXECUTED SUCCESSFULLY EVEN IF C1-TXNCU BATCH FAILS
Description	<p>When you execute the C1-TXNCU batch with either of the following parameters during the cancellation process, an error occurs:</p> <ul style="list-style-type: none"> • Transaction Source • Division <p>If you further execute the C1-TXCNC batch during the cancellation process, the status of all transactions in the feed is changed to Cancelled (CNCL). But, in this case, the SQIs on the billable charges are not accurate.</p>
Workaround	None

Issue	ERROR WHEN NUMBER OF RECORDS FOR PAGINATION IN ODB SCREENS SET TO 50 OR ABOVE
Description	A warning message appears when you set the Number of Records Per Page field to 50 or above in the Usage Data or View Bill Data screen.
Workaround	<p>You can avoid this warning message by editing the registry. Using a Registry Editor, such as Regedt32.exe, open the following key:</p> <ol style="list-style-type: none"> 1. HKEY_CURRENT_USER\Software\Microsoft\Internet Explorer\Styles <p>If the Styles key is not present, create a new key named Styles. Then, create a new DWORD value named MaxScriptStatements under this key, and set its value to 0xFFFFFFFF to avoid the warning message.</p>

Issue	INCORRECT RESULTS IF BUNDLE USED INSTEAD OF PRODUCT IN RATIO OR PHANTOM BUNDLE
Description	If you use a bundle instead of a product in a ratio or phantom bundle, service quantity is aggregated incorrectly, and thus the bill amount is inaccurate.
Workaround	None

Issue	TIERED PRICING - 0 VALUE IN THE TO FIELD IS CONVERTED TO 9999999999999999.99
Description	While defining a tiering range, if you specify zero (0) in the To field, the value is automatically getting converted to 9999999999999999.99.
Workaround	None

Issue	ERRONEOUS RESULTS WHEN BILLABLE CHARGES ARE VOLUMINOUS & SESSION TIMEOUT IS LOW
Description	While billing, you may notice erroneous results when the default session timeout is low and the number of billable charges of an account are high.
Workaround	In such case, we recommend you to generate the bill through a batch process instead of generating the bill through the Bill screen.

Issue	INAPPROPRIATE SEARCH RESULTS IF SEARCH CRITERIA CONTAINS SPECIAL CHARACTERS
Description	If the search criteria contains a special character such as underscore (_), percentage (%), ampersand (&), or asterisk (*), the search results may not be appropriate.
Workaround	None

Issue	CONDITIONAL APPROVAL WORKFLOW CANNOT BE USED WHILE COPYING A PRICE LIST
Description	The system allows you to define conditional approval workflow for business objects. However, at present the conditional approval workflow cannot be used while copying a price list.
Workaround	None

Issue	BILLS GENERATED FOR THE MEMBER ACCOUNT AND NOT FOR THE MASTER ACCOUNT
Description	If you add a contract to a member account after the account is added to the master account, the system will not duplicate the newly added contract at the master level. Therefore, in such scenarios, billable charges related to the newly added contract will be billed to the member account and not to the master account.
Workaround	You need to ensure that no new contracts are added to the member account after the account is added to the master account.

Issue	TRANSACTIONS WITH SAME TRANSACTION ID CAN BE PROCESSED ON TWO DIFFERENT DATES
Description	Now, due to table partitioning, the system can process transactions with the same transaction ID on two different processing dates. If your data upload interface doesn't generate unique transaction IDs, this might result in erroneous results at a later stage.
Workaround	To avoid any such erroneous results, we recommend you to use the unique transaction ID generation sequence named RMB_CI_TXN_DETAIL_SEQ shipped with ORMB.

Issue	SEARCH RESULT DISPLAYS TRANSACTION LEGS ON SEARCHING INPD & COMP TRANSACTIONS
Description	In the Transaction Details screen, when you search for the INPD transactions, the Search Results section should display transactions which are in the INPD status. However, at present, all legs of the INPD transactions are displayed in the Search Results section. Similarly, when you search for the COMP transactions, the Search Results section should display transactions which are in the COMP status. However, at present, all legs of the COMP transactions are displayed in the Search Results section.
Workaround	None

Issue	MULTIPLE POST PROCESSING BILL SEGMENTS CREATED ON A BILL HAVE SAME CONTRACT ID
Description	There might be situations when two or more post processing bill segments are generated on a bill and each post processing bill segment is created for a different contract. In such case, the contract ID stamped on the post processing bill segments must be different. However, at present, the system stamps the same contract ID in all post processing bill segments on the bill.
Workaround	None

Issue	INCORRECT RESULTS IF DISAGGREGATION BATCHES NOT EXECUTED IN SEQUENCE
Description	<p>During the transaction disaggregation process, you must execute the following batches in the specified order:</p> <ol style="list-style-type: none"> 1. Identify Affected Transactions (C1-IAENT) 2. Process Non Aggregated Transactions (C1-PDTXN) 3. Clean Up (C1-TXNCU) 4. Update Disaggregation Request Status (C1-DARSU) <p>Otherwise, erroneous results might occur.</p>
Workaround	None

Issue	PERFORMANCE ISSUE WHILE EXECUTING THE C1-DARSU BATCH WHEN REQUEST_TYPE_FLG=PERS
Description	The system takes long time to change the disaggregation request status when the disaggregation request is created for a person.
Workaround	None

Issue	AGGREGATION DOESN'T WORK IF DISAGG, ROLLBACK, & CANCELLATION EXECUTED IN BETWEEN
Description	If you execute the disaggregation, cancellation, and rollback process in between the aggregation process, the system will not allow you start the aggregation process once again.
Workaround	None

Issue	POST PROCESSING SEGMENT NOT GENERATED IF THE PP MAX VALUE IS SET TO ZERO (0)
Description	If the maximum value is set to zero (0) while defining pricing for a product have price assignment type as post processing, the system does not generate the post processing segments for such products.
Workaround	None

Issue	TWO CONCURRENT RUNS WHICH DERIVE SAME DIVISION FOR TRANSACTIONS DOES NOT WORK
Description	If you execute a batch concurrently with two different divisions (for example, D1 and D2), the erroneous results might occur when transactions in both the runs derive the same division, account, and/or product combination.
Workaround	None

Issue	ERROR OCCURS WHEN YOU DISPLAY BILL FOR A PRODUCT THAT BELONGS TWO RELATIONSHIPS
Description	If a product is added to two or more product to product relationships using the relationship type as Service, the system error occurs when you display bill for the product using Documaker. For example, if P3 is added in the P1 and P2 product relationship using the relationship type as Service, an error occurs when you display bill for P3 using Documaker.
Workaround	None

Issue	C1-IAENT BATCH IN ERROR IF THERE ARE UNBILLED BILLABLE CHARGES
Description	If there are any billable charges in the Billable status for accounts whose transactions are performed before the Disaggregate Transactions From Date, an error occurs while executing the Identify Affected Transactions (C1-IAENT) batch.
Workaround	None

Issue	PAGINATION - UNABLE TO EXTRACT RECORDS OF ANY OTHER PAGE OTHER THAN FIRST PAGE
Description	If you use the Export to Excel functionality on any screen where pagination is used, the system should extract the records of the page where you have navigated. However, the system always extracts the records on the first page in the Excel format. Therefore, at present, you cannot extract records of any other page other than first page in the Excel format.
Workaround	To resolve this issue, you need to apply the framework single fix which is available for BUG 20856028 - PAGINATION: DOES NOT EXPORT ENTIRE RECORDS RATHER EXPORTS PAGE RECORD ONLY.

Issue	ERROR OCCURS IN CASE OF AN IGA SCENARIO WHILE EXECUTING THE C1-PNDBL BATCH
Description	There might be situations when you add an account to an invoicing group after a bill is generated for the account using the new billing batches (i.e. C1-PNDBL, C1-BSGEN, and C1-BLPPR). In such scenario, an error occurs when you execute the C1-PNDBL batch once again to bill charges of the member account on the master account. Similarly, an error occurs when you generate the bill for the account which was earlier billed through the master account using these billing batches.
Workaround	None

Issue	ACTIVE CONSTRUCTS DETERMINED ON CUT-OFF DATE INSTEAD OF CHARGES START & END DATE
Description	The system determines the active construct based on the cut-off date and bills the usage accounts' charges through an invoice account which is defined in the active construct. It does not determine the active construct based on the billable charge's start and end dates.
Workaround	None

Issue	BILL SEGMENTS CREATED BUT FTS NOT CREATED WHEN ACCOUNTING CALENDAR NOT DEFINED
Description	There might be situations when you generate bill segments for a pending bill which is created for a bill cycle whose accounting date either falls within the closed accounting calendar or does not fall within any accounting calendar. In such scenarios, the bill segments are generated, but the financial transactions are not created for the bill segments. An error occurs when you view such bills, whose financial transactions are not created, through the Bill screen.
Workaround	None

Issue	UNABLE TO DEFINE ACCOUNT CATEGORY WHEN ACCOUNT IS CREATED USING PERSON SCREEN
Description	The system allows you to create an account for a person by selecting the Add Account and Start Service check box in the Person screen. In such case, you cannot define category for the account because the Account Category field in the Account screen is disabled.
Workaround	None

Issue	STATUS OF ALL LEGS CHANGED TO ERROR IF EXCHANGE RATE NOT AVAILABLE FOR ONE LEG
Description	If a transaction has multiple legs and the system could not find exchange rate for one of the leg while executing the C1-TXNSQ batch, the status of the transaction and all its transaction legs is changed to Error .
Workaround	None

Issue	INCORRECT RESULTS APPEAR WHEN UNDERSCORE CHARACTER IS USED IN SEARCH CRITERIA
Description	If you use the underscore (<code>_</code>) character in the search criteria, the system does not search strings with the underscore character. Instead, the system interprets the underscore (<code>_</code>) character as a wildcard character.
Workaround	None

Issue	MULTIPLE ISSUES ON SCREENS AND ZONES WHERE PAGINATION IS USED
Description	There are various issues on the screens and zones where pagination is used. For example, the buttons and icons do not appear in the F1-DE-MULQRY zones, paging keys are trimmed, and so on.
Workaround	To resolve these pagination related issues, you need to apply framework single fixes which are available for the following bugs: <ul style="list-style-type: none"> • 20302717 - PAGINATION PANEL SHOWING INCORRECT VALUE FOR TOTAL PAGES AND CUSTOM ICONS DO NOT • 20261532 - PAGINATION PANEL IS BEING DISPLAYED ON ORASEARCH OPERATION • 20113520 - BUTTON AND ICON DOESN'T APPEAR FOR PAGINATION IN F1-DE-MULQRY ZONES • 19941127 - PAGINATION FEATURE NOT WORKING FOR SUBQUERIES USED IN ZONE SQL • 19163528 - PAGINATION : PAGING KEY GETS TRIMMED AND RETURNS NO RESULTS

	<ul style="list-style-type: none"> • 18965501 - PAGINATION : ALL THE PAGES DISPLAY SAME SET RECORDS WHEN EQUAL OPERATOR IS USED • 18953690 - PAGINATION: ROW SERIAL NUMBERS RESET WHEN WE SORT COLUMN, AFTER "NEXT" CLICK • 18887503 - PAGINATION DOCUMENTATION NEEDS MORE DETAIL • 18639253 - PAGINATION - MISSING ICON, PAGE LABEL AND PAGE SIZE • 18491431 - DATA EXPLORER PAGINATION IS NOT CONSIDERING THE SQL COUNT LIMIT ZONE PARAMETER • 18399979 - PAGINATION - CRASHING IF PAGING COLUMN IS NOT DISPLAYED • 18399934 - PAGINATION - NOT WORKING FOR DESCENDING SORT • 20864137 - PAGINATION DOES NOT WORK PROPERLY WHEN PORTAL HAS MULTIPLE BROADCAST ZONES
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Issue	CONTRACT TYPE IS HARDCODED IN PAYMENTS ZONE OF REMITTANCE SUMMARY SCREEN
Description	The Payments zone in the Remittance Summary screen should lists the overpayments which are made against the contract types listed in the C1_CMO feature configuration. However, at present, the EXCSCRED contract type is hardcoded in the Payments zone. Therefore, irrespective of the contract types defined in the C1_CMO feature configuration, the system lists only those overpayments which are made against the contracts of the EXCSCRED contract type.
Workaround	None

Issue	PAYMENT AMOUNT IS INCORRECT WHEN PAYMENTS HAVE FROZEN & OVERPAYMENT PAY SEGMENTS
Description	If the payments have both frozen and overpayment pay segments, the payment amount displayed corresponding to the overpayment and frozen payment in the Payments zone of the Remittance Summary screen is incorrect. The system displays the total payment amount instead of displaying the overpayment and frozen pay segment amount.
Workaround	None

Issue	ERROR OCCURS WHEN BIND VARIABLES USED IN IN AND NOT IN CLAUSES WITHOUT BRACKETS
Description	If a template is used in a construct for selecting usage accounts, billable charges, or adjustments where bind variables are used in the IN and NOT IN clauses without brackets, an error occurs when you bill an account through such construct.
Workaround	We recommend you to use bind variables within brackets in the IN and NOT IN clauses while defining a template.

Issue	C1-ADUP1 BATCH DOES NOT SUPPORT MULTI-CURRENCY ACCOUNTS FEATURE
Description	An error occurs while executing the C1-ADUP1 batch when the adjustment currency is different from the account's invoice currency. This is because, at present, the C1-ADUP1 batch does not support the Multi-Currency Accounts feature.
Workaround	None

Issue	ABLE TO CREATE BILLABLE CHARGES FOR AN INVOICE ACCOUNT
Description	Ideally, the system should not allow you to create billable charges for an invoice account. At present, there is no restriction, and therefore you can create billable charges for an invoice account which are billed through the invoice account.
Workaround	None

Issue	PARTIAL DATA UPLOADED WHEN USAGE RECORD HAS MORE THAN FIVE PASS THROUGH CHARGES
Description	If you upload a usage record which has more than five pass through charges (for example, Bill Line 1, Bill Line 2, ..., Bill Line 8), at present, the system uploads the details of only five pass through charges (i.e. till Bill Line 5). The details of Bill Line 6, Bill Line 7, ..., and Bill Line 8 are not uploaded.
Workaround	None

Issue	LENGTH OF UDF_CHAR_X IS 50 IN THE TFM ODI PACKAGE AND 60 IN THE DATABASE
Description	In the ORMB database, the maximum size of the UDF_CHAR_1, UDF_CHAR_2, ..., UDF_CHAR_50 columns is set to 60 characters. However, while uploading the transaction data via ODI, you can specify maximum 50 and not 60 characters in the CSV file.
Workaround	None

Issue	UNABLE TO EDIT A FILE GROUP FROM THE ON DEMAND BILLING SCREEN
Description	On clicking the link in the File Group column, the Add/Edit File Group screen appears where you can edit the details of the file group. However, at present, the Add/Edit File Group screen does not appear. Therefore, you are not able to edit a file group.
Workaround	None

Issue	UNABLE TO VIEW THE XAI UPLOAD STAGING DETAILS IN THE XAI DYNAMIC UPLOAD SCREEN
Description	When you search and select an XAI upload staging record in the XAI Upload Search window, the details of the XAI upload staging record do not appear in the XAI Dynamic Upload screen. Instead, the home page appears.
Workaround	None

Issue	ERROR OCCURS ON CLICKING SHOW CONTEXT MENU CORRESPONDING TO DOWNLOAD STAGING ID
Description	An error (indicating invalid menu entry) occurs when you click the Show Context Menu icon corresponding to the Download Staging ID field in the XAI Download Staging screen.
Workaround	None

Issue	GRAPH DOES NOT APPEAR IN THE MULTI-CANCEL/REBILL SCREEN
Description	At times, the graph does not appear in the Multi-Cancel/Rebill screen when you access the application using Internet Explorer.
Workaround	None

Issue	ADJUSTMENT CREATED WHEN CONTRACT ID IS VALID, BUT ACCOUNT IDENTIFIER IS INVALID
Description	If you upload an adjustment data file with a record where the contract ID is valid, but the account ID or account identifier is invalid, the system creates the adjustment against the contract. Ideally, the system should not create the adjustment until and unless the contract ID, account ID, account identifier type, and account identifier are valid.
Workaround	None

Issue	ABLE TO GENERATE A BILL FOR A SETTLEMENT ACCOUNT FROM THE BILL SCREEN
Description	Ideally, the system should not allow you to generate a bill for a settlement account. However, at present, you can generate a bill for a settlement account from the Bill screen.
Workaround	None

Issue	ADJUSTMENT CREATED AGAINST PREVIOUS BILL IS NOT CONSIDERED DURING TRIAL BILLING
Description	If you create an adjustment against the previous completed bill, the adjustment is not presented on the next bill during trial billing. This open item accounting feature is not supported during trial billing.
Workaround	None

Issue	POST PROCESSING BILL SEG AMT PRORATED IF BILLABLE CHARGE PERIOD EXCEEDS 2 YEARS
Description	If a billable charge period is 2 years or above and post processing bill segment is generated based on the billable charge, the post processing bill segment amount is prorated during bill generation.
Workaround	None

Issue	REOPEN BUTTON DISABLED WHEN C1-BILLSETT ALGORITHM ATTACHED ON CUSTOMER CLASS
Description	If you attach an algorithm of the C1-BILLSETT algorithm type on the Bill Completion system event of the account's customer class, at present, you will not be able to reopen a bill.
Workaround	None

Issue	TRANSFER ADJUSTMENT TYPE PROPERTY SUPERSEDE ORIGINAL ADJUSTMENT TYPE PROPERTY
Description	If you create an adjustment on a usage account and bill it through an invoice account, the transfer adjustment is created on the invoice account. While creating a transfer adjustment, the system uses the open item accounting properties, such as Impact Next Bill Balance, defined on the transfer adjustment type. It does not uses the open item accounting properties defined on the original adjustment type.
Workaround	None

Issue	WRONG ERROR MESSAGE APPEARS WHILE DOING PARTIAL NEGATIVE PAYMENT
Description	If you do a partial payment against a negative (i.e. credit) bill from the Payment Request screen, the payment is created in the Error status. However, the error message shown against the payment is wrong. Ideally, the error message should be "For a Negative payment in case of a Credit bill, Payment amount must match Bill amount". However, at present, the following error message is displayed: "Sum of Distributed Amounts does not equal the Payment Amount for Payment <Payment ID>"
Workaround	None

Issue	THE PAYMENT REQUEST SCREEN DOES NOT SUPPORT MULTIPLE TENDERS
Description	At present, the system does not support multiple tenders when you create a payment from the Payment Request screen.
Workaround	None

Issue	ADJ NOT BILLED ON INVOICE ACCOUNT IF TRANSFER ADJ TYPE NOT ADDED IN ADJ PROFILE
Description	If the adjustment must be billed through an invoice account and the transfer adjustment type is not added in the adjustment profile which is attached to the contract type, the system does not create the transfer adjustment on the invoice account. Instead, the system bills the adjustment on the usage account.
Workaround	None

Issue	INCORRECT EXCHANGE RATE USED WHILE CREATING TRANSFER ADJUSTMENT ON INVOICE A/C
Description	If the adjustment currency is different from the invoice account's currency, the system creates the transfer adjustment on the invoice account. However, at present, the exchange rate used during currency conversion is not picked up correctly.
Workaround	None

Issue	PRICELIST ASSIGNMENT IN REJECTED STATUS APPEARS IN ASSIGNED PRICE LISTS ZONE
Description	On rejecting a proposed price list assignment, the rejected price list assignment must not appear in the Assigned Price Lists zone of the Price List Assignment (Account) or Price List Assignment (Person) screen. However, at present, the rejected price list assignment appears in the Assigned Price Lists zone.
Workaround	None

Issue	ABLE TO ADD A RELATIONSHIP TYPE MULTIPLE TIMES IN THE C1_PER_REL FEATURE CONFIG
Description	At present, the system does not prevent you to add a relationship type multiple times in the C1_PER_REL feature configuration. Ideally, there should be a system validation to handle this issue.
Workaround	None

Issue	MULTIPLE PARENTS WITH SAME PERSON-PERSON RELATIONSHIP TYPE SHOULD NOT BE ALLOWED
Description	At present, the system allows you to define multiple parents with the same relationship type for an overlapping date range. This can lead to erroneous results while searching for effective pricing at the parent customer level.
Workaround	We recommend you to define multiple parents with the same relationship type for a different date range.

Issue	UNABLE TO SAVE MULTIPLE CHARACTERISTICS FOR A PRICE ASSIGNMENT
Description	While defining characteristics for a price assignment, you can specify multiple characteristics in the screen, but only one characteristic is saved in the application.
Workaround	None

Issue	UNABLE TO SCROLL LEFT TO VIEW TABS ON THE LEFT IN THE DIVISION SCREEN
Description	The Scroll Left icon is not available in the Division screen. Therefore, you will not be able to scroll left if you are on the extreme right tab in the screen.
Workaround	None

Issue	POP-UP WINDOW NOT DISPLAYED PROPERLY WHEN YOU MOUSE OVER DETAILED DESCRIPTION
Description	In the Batch Control screen, a pop-up window appears when you move the mouse over the Detailed Description field. At present, the data is not properly displayed in the pop-up window.
Workaround	None

Issue	QUERY ZONE - HORIZONTAL SCROLL BAR SCROLLS THE SEARCH CRITERIA FIELDS
Description	The Query zone allows you to search for an object. At present, whenever you search in the Query zone and use the Horizontal Scroll Bar, the search criteria fields are also scrolled to the left along with the search results.
Workaround	None

Issue	ICONS AND LINKS ARE SCROLLED TO THE LEFT ON SCROLLING HORIZONTALLY IN THE ZONE
Description	When you scroll the data in the zone to the left using the Horizontal Scroll Bar, the icons (such as Filters, Explorer Zone Menu) and links (such as Add, Edit) that appear in the upper right corner of zone are also scrolled to the left.
Workaround	None

Issue	COLUMN HEADER ROW IS NOT FREEZED OR LOCKED IN THE SEARCH RESULTS SECTION OR GRID
Description	The column header row is not freezed or locked in the Search Results section or grid across the application. Therefore, the column header row is not visible whenever you scroll down to view the records.
Workaround	None

Issue	UNABLE TO ADD COMMENTS ON CLICKING RETURN TO SUBMITTER OR REVERT TO ORIGINAL
Description	While rejecting or cancelling the approval workflow request raised for a product (from the Approve Product screen), the background of the Rejection/Cancellation Comment field is black. Therefore, unable to view the comments (if any) added while rejecting or cancelling the approval workflow request.
Workaround	None

Issue	PERFORMANCE ISSUE ON CHANGING THE SEARCH BY FILTER OPTION
Description	If you change the filter option from the Search By list, the system takes long time to load the respective query zone. You may observe this issue in many screens where the multi-query zone is used.
Workaround	None

Issue	PROPOSED PRICE LIST PRICING NOT AVAILABLE ON THE EFFECTIVE PRICING SCREENS
Description	If you assign a proposed price list to a person, the product pricing defined on the price list is not inherited from person or parent person. Therefore, such product pricing is not visible in the Pricing (Account) and Pricing (Person) screens. In addition, such product pricing is not used during the billing process.
Workaround	None

Issue	EFFECTIVE PRICING NOT VISIBLE IF C1_PER_REL HAS INVALID PERSON RELATIONSHIP TYPE
Description	If you set the Check on Feature Configuration parameter in an algorithm which is created using the C1-CUSRLALGT algorithm type to A and add an invalid person relationship type in the C1_PER_REL feature configuration, the effective pricing is not inherited properly as expected.
Workaround	None

Issue	GRANDFATHERING NOT WORKING IN CASE OF GLOBAL AND DEFAULT PRICE LIST
Description	When you define a product pricing in a global or default price list which is applicable only to the new customers, the product pricing is not used during the billing process. Instead, the incorrect product pricing is picked up during the billing process.
Workaround	None

Issue	RECORDS IN THE ADJUSTMENT DATA FILE NOT UPLOADED IN THE SPECIFIED SEQUENCE
Description	When you upload the records of an adjustment data file, the records are not uploaded in the sequence in which they are listed in the CSV file.
Workaround	None

Issue	PAYMENT/TENDER SEARCH- COLUMN HEADERS INCORRECT WHEN SEARCH FILTER IS CHANGED
Description	If you search using a particular filter option in the Payment/Tender Search screen, the search results are displayed accordingly. Then, if you change the search filter and criteria, the search results are displayed accordingly, but the column headers are not updated.
Workaround	None

Issue	ERROR LOG FILES GENERATED ON EXECUTING BILLING AND C1-BLPPR BATCHES
Description	In ORMB 2.6.0.0.0, the error log file is generated even when the following batches are executed successfully and bills are completed: <ul style="list-style-type: none"> • BILLING • C1-BLPPR
Workaround	None

Issue	FIELD ALIGNMENT ISSUE ON BUSINESS OBJECT BASED GENERATED UI MAPS
Description	You may observe that the algorithm description is not properly aligned corresponding to the Algorithm field in the following screens: <ul style="list-style-type: none"> • Upload Request Type • Upload Adjustment Data File
Workaround	None

Issue	MANUAL DISTRIBUTION NOT WORKING IN THE PAYMENT SCREEN
Description	On saving, the distributed amount is reset to zero when you manually distribute the tender amount among the unpaid bills in the Payment screen.
Workaround	None

Issue	ERROR OCCURS ON EXECUTING BILLOPEN IF IN CLAUSE CONTAINS MULTIPLE BIND VARIABLES
Description	If you have used template in a construct where IN clause has multiple bind variables, an error occurs while executing the Construct Based - Pending Bill Generation (BILLOPEN) batch.
Workaround	None

Issue	ELIGIBILITY CRITERIA ROW IS SKIPPED IF LEFT HAND SIDE PARAMETER IS NOT SPECIFIED
Description	If the left hand side parameter is not specified in an eligibility criteria row while defining or editing a price item pricing, the eligibility criteria row is skipped and not saved in the system.
Workaround	None

Issue	PARAMETERS NOT DELETED AUTOMATICALLY WHEN EFFECTIVE START OR END DATE IS CHANGED
Description	If you change the effective start or end date while defining or editing a price item pricing, the selected parameters are not automatically deleted. You need to manually delete the existing parameters and specify the parameters which are effective during the specified date range.
Workaround	None

Issue	POST-PROCESSING BILL SEGMENT NOT REGENERATED WHEN YOU CLICK THE GENERATE BUTTON
Description	An error occurs when you click the Generate button in the Bill Segment screen while regenerating the post-processing bill segment which is present on the pending bill.
Workaround	None

Issue	SEARCH FIELDS ARE CASE-SENSITIVE IN THE PREDEFINED CHARACTERISTIC SEARCH WINDOW
Description	If you select a predefined characteristic type, the Search icon appears corresponding to the Characteristic Value field. On clicking the Search icon, you can search for a predefined characteristic value. At present, the search criteria fields in the Predefined Characteristic Search window are case-sensitive.
Workaround	None

Issue	ASSIGNPRICELIST SERVICE DOES NOT UPDATE CHARACTERISTIC IF EFFECTIVE DATE EDITED
Description	If you update a characteristic for a price list assignment through the ASSIGNPRICELIST business service, the system will update the existing characteristic when the characteristic value is changed. However, when the characteristic type or effective date is changed for a characteristic, the existing characteristic is not updated. Instead, a new characteristic is defined for the price list assignment through the ASSIGNPRICELIST business service.
Workaround	None

Issue	ABLE TO ADD VALUES TO THE LOOKUP FIELDS WHERE CUSTOM IS SET TO NO
Description	The system should not allow you to add values to the lookup fields where the Custom option is not selected. But, at present, the system allows you to add values to the lookup fields irrespective of whether the Custom option is selected or not.
Workaround	None

Issue	WRONG CURRENCY CONVERSION ALGORITHM IS USED WHILE EXECUTING THE C1-REPC2 BATCH
Description	While executing the C1-REPC2 batch, the system should use the currency conversion algorithm attached to the Currency Conversion For Bill Segments algorithm spot of the division. Instead, the system uses the currency conversion algorithm attached to the Currency Conversion For Adjustments algorithm spot of the division.
Workaround	None

Issue	RATE CALCULATED INCORRECTLY WHEN EXCHANGE RATE IS CHANGED DURING PRICING PERIOD
Description	At present, the rate is calculated and persisted using the exchange rate which is effective on the price item pricing effective start date. Therefore, the persisted rate shown on the Pricing (Account) screen might be incorrect when the exchange rate is different on the date when the results are fetched on the Pricing (Account) screen.
Workaround	None

Issue	RATE PERSISTED INCORRECTLY WHEN CONFIGURATION CHANGED BEFORE EXECUTING C1-REPC2
Description	If you change the configuration, such as the person to person relationship type sequence defined in the C1_PER_REL feature configuration, the currency conversion algorithms attached on the division, and so on before executing the C1-REPC2 batch, the rate might be calculated and persisted incorrectly on executing the C1-REPC2 batch. In such scenario, you need to execute the F1-FLUSH batch before executing the C1-REPC2 batch.
Workaround	None

Issue	ENTRY NOT CREATED IN THE CI_REPRC_ENTITY_DTL TABLE ON EDITING A PRICE LIST
Description	If you edit the details of a price list which is assigned to an account or a person, an entry is not created in the CI_REPRC_ENTITY_DTL table. In other words, the repricing is not triggered on editing the details of a price list which is already assigned to an account or a person.
Workaround	None

Issue	ENTRY NOT CREATED IN CI_REPRC_REQ_DTL TABLE ON EDITING USAGE AMOUNT OR COUNTER
Description	If you edit the amount and counter related information, such as average daily balance, average monthly balance, number of auto transfer transactions, and so on, of an account or a person, an entry is not created in the CI_REPRC_REQ_DTL table.
Workaround	None

Issue	UNABLE TO DEFINE PARAMETER FOR FIELDS WHICH BELONG TO CHILD TABLES
Description	At present, the system does not list the fields of child tables in the Source Type Code field when you select the source entity as Account, Person, or Product while defining a parameter. Therefore, you cannot define a parameter for child table' fields and as a result, repricing is not triggered when you change the value of any child table' field. For example, when you change the main customer of an account, repricing is not triggered because the MAIN_CUST_SW field belongs to the child table named CI_ACCT_PER table for which you cannot define a parameter in the system.
Workaround	None

Issue	RATE NOT PERSISTED ON PRICE ASSIGNMENT DATE WHEN C1-PRICEACCOUNT INVOKED MANUALLY
Description	When you manually execute the C1-PriceAccount business service for an account, rate is calculated and persisted for the price item pricing available on the default and global price list on the date when the C1-PriceAccount business service is invoked. Ideally, the rate must be calculated and persisted on the price item pricing effective start date.
Workaround	None

Issue	BILL AMOUNT IS COMING POSITIVE RATHER THAN NEGATIVE
Description	While rounding the bill amount with the precision of 13,2 (for example, 999999999999.99), the system truncates the negative sign and saves the bill amount in positive.
Workaround	None

Issue	PERSISTED DATA NOT GETTING REFRESHED ON EDITING PRICE ASSIGNMENT
Description	On editing a price item pricing, the rate is not properly recalculated and persisted when the details of a price component, such as rate, eligibility criteria, and so on are changed.
Workaround	None

Issue	ADJUSTMENTS & BILL SEGMENTS CANCELLED WHEN WRITE OFF OR REFUND REQUEST PROCESSED
Description	At present, you can cancel refund and write off adjustments and bill segments against which you have created refund or write off adjustments in the system. Ideally, when the refund and write off request is in the Processed status, the system should not allow you to cancel the respective refund and write off adjustments and bill segments against which you have created refund or write off adjustments.
Workaround	None

Issue	CALENDAR (START DATE AND END DATE) POP-UP NOT ALIGNED PROPERLY
Description	Calendar pop-up for start date and end date of Hold Request screen is displayed partially outside the screen.
Workaround	None

Issue	PRICELIST EDIT VALIDATIONS NOT DEPENDENT ON ASSIGNMENT DATE OR ASSIGNMENT STATUS
Description	Available and Eligible dates can be edited in Price List though Assignment Date or Assignment Status is added for price list.
Workaround	None

Issue	STACKING IS NOT SUPPORTED FOR PRICE SIMULATION
Description	Stacking is supported for bill generated through an Account. Pricing Simulation does not support stacking.
Workaround	None

Issue	ADJUSTMENT AMOUNT IS NOT PICKED UP FOR PAYMENT IN NEXT BILL
Description	When you generate an Adjustment after a successful payment, the Adjustment amount is not picked up in the next bill that is generated and hence, payment is not created for the adjustment amount.
Workaround	None.

Issue	IF USAGE ACCOUNT IS NOT PART OF ANY INVOICE CONSTRUCT, BILL IS NOT GENERATED.
Description	At present system does not allow user to generate a bill on usage account which is not part of any invoice construct. System should allow user to generate a bill on usage account which is not part of any invoice construct.
Workaround	None

Issue	SPLIT AUTO PAY NOT AVAILABLE ON SETTLEMENT CONSTRUCT ACCOUNT CREATION SCREEN.
Description	At present split auto pay is not supported on Settlement construct because Percentage field has to be added in Auto Pay Instructions section while creating a new account.
Workaround	None

Issue	SQL ERROR ON PRICE ASSIGNMENT SCREEN WITH ADHOC VALUE PASSED IN QUOTES.
Description	At present SQL error is displayed in Price Assignment screen for parameter when adhoc value is added in quotes. Price Assignment should be successful though value added is in single quotes.
Workaround	None

Issue	INCONSISTENT BEHAVIOUR FOR VALIDATING PRICING ELIGIBILITY ON PRICING SIMULATION
Description	Rate is not getting calculated based on Contributing Factors in Pricing Simulation screen.
Workaround	None

Issue	BS ARE NOT GETTING PICKED FOR BATCH DATE AFTER BILLABLE CHARGE END DATE
Description	At present, batch business date is later then billable charge date and C1_BILLGEN is not creating any BS, hence bill is not generated.
Workaround	None

Issue	RSDetails Updated Incorrectly When Price Component Fees/Rate Persistence Edited
Description	At present RSDetails after modification is displayed and not the details before editing.
Workaround	None

Issue	FEES RATE CALCULATION PRE-PROCESSING ALGORITHM ISSUE
Description	Algorithm only considers the latest Service Quantity Identifier, it has to consider both Parameter and Service Quantity Identifier when calculating FEES and RATE.
Workaround	None

Issue	C1-ACFEES BATCH RUN WITH PRICE ITEM CODE AS THE ONLY PARAMETER.
Description	C1-ACFEES batch should consider records of price assignment where FEES for same should persist.
Workaround	None

Issue	PRICE ASSIGNMENT TYPE - POST PROCESSING ISSUE IN FEES CALCULATION BATCH.
Description	New value to be added in Price Assignment Type for post processing issue in FEES calculation batch.
Workaround	None

Issue	C1-ACCOUNTFEES SERVICE ISSUE
Description	At present FEES for price assignments are not persisted if any one price assignment eligibility rule results false and if no RATE found for same.

Workaround	None
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Issue	PAYMENT STATUS REMAINS INCOMPLETE AND NO PAYMENT SEGMENT IS GENERATED EVEN WHEN TENDER CONTROL ID IS GENERATED
Description	For `On Extract Date`, if one of the split auto payments goes in to error state, BALAPY batch generates Tender Control Id and Payment Status remains Incomplete and no Payment segment is generated.
Workaround	None

Issue	CHANGES MADE TO ACCOUNT ARE NOT UPDATED WHEN APPROVAL WORKFLOW IS ACTIVE FOR ACC
Description	At present columns are not properly aligned and changes are not updated when Approval Workflow is Active. Changes done to account should be updated when approval workflow is active.
Workaround	None

Issue	NULLPOINTEREXCEPTION OCCURS WHEN THE AUDIT PROGRAM TYPE IS SET TO JAVA
Description	A NULLPOINTEREXCEPTION occurs when you set the Audit Program Type field to Java while enabling the audit functionality for a table.
Workaround	Instead, you must set the Audit Program Type field to Java (Converted) while enabling the audit functionality for a table.

Issue	SQL IS NOT PICKED AS PER SEQUENCE IN FEES & RATE CALCULATION PRE-PROCESSING ALGO
Description	If you map two or more parameters with the same SQL in the algorithms created using the C1-RATECPR and C1-FEERTCPR algorithm types, the system will use the Parameter-SQL mapping with the lowest sequence defined in the algorithm for persisting price item rate and fees across division.

Workaround	None
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Issue	INBOUND WEB SERVICE DOES NOT TRIM LEADING & TRAILING SPACES FROM INPUT PARAMETER
Description	If you pass input parameters with leading and trailing spaces to an inbound web service, the inbound web service does not trim the leading and trailing spaces from the input parameters.
Workaround	None

Issue	IF USER ADDED DEFER AUTO PAY DATE ON ACCOUNT THEN AUTO PAY WILL NOT WORK
Description	If you manually add the date in the Defer Auto Pay Date field, the automatic payment functionality will not work for the account.
Workaround	None

Issue	TOTAL OVERDUE AMOUNT IN ACCOUNT & PERSON DETAILS SECTIONS SHOW INCORRECT VALUE
Description	If you manually include a bill in more than one active overdue process through the user interface, the amount shown in the Total Overdue Amount field is incorrect when you search for an overdue process using the Person or Account details in the Delinquency Central screen.
Workaround	None

Issue	MULTIPLE VALUES SPECIFIED WHILE DEFINING CRITERIA FOR BILLABLE CHARGE SELECTION
Description	If you have used billable charge selection template in a construct where IN clause has one bind variable, you should not specify multiple values for the bind variable. The system will consider the first value in the Value field as the value for the bind variable and the remaining values specified in the comma-separated list will be omitted.

Workaround	None
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Issue	SEASONAL ADDRESS ID DOES NOT APPEAR IN THE BILL ROUTINGS TAB OF THE BILL SCREEN
Description	At present, the seasonal address which is effective at the time of billing is considered for bill routing. You can view the seasonal address details in the Bill Routings tab of the Bill screen. However, the seasonal address ID does not appear corresponding to the Address ID field.
Workaround	None

Issue	ACCOUNT OVERRIDE ADDRESS IS NOT DELETED WHEN THE BILL ROUTING RECORD IS DELETED
Description	Once you delete a bill routing record for a person from the Account screen where the Address Source field is set to Account Override , the corresponding account override address is not deleted from the system. You can still view the account override address on the screen.
Workaround	None

Issue	OVERRIDE DUE DATE NOT CALCULATED CORRECTLY IN CASE OF REINSTATEMENT
Description	If a customer is not active (i.e. does not have at least one active policy) and reinstatement request is received to reinstate the customer's policy which is terminated due to non-payment, the system should override the due date on the next bill using the Days Until Due parameter in the C1-DUEDTFTCV algorithm which is attached on the respective customer class. As per this algorithm, the override due date should be calculated as bill date plus days until due. However, at present, the system does not override the due date using the Days Until Due parameter. It reflects the due date which is the next coverage period start date.
Workaround	None

Issue	PREMIUM AMOUNT IS NOT PRORATED AS PER THE BILLABLE CHARGE START DATE
Description	If a policy start and end dates are 1 st Jan 2017 and 31 st Dec 2017 and you create a billable charge for premium from 10 th Jan 2017 to 31 st Mar 2017, the system should ideally calculate the prorated amount for the month of Jan 2017 for 21 days. However, at present, the premium amount is not prorated for the month of Jan 2017.
Workaround	None

Issue	C1-FTDRD BATCH THROWS NULL POINTER EXCEPTION
Description	A null pointer exception occurs when you specify the trace parameters while executing the Financial Transaction Distribution Monitor (C1-FTDRD) batch.
Workaround	None

Issue	UNABLE TO ENTER VALUE FOR A PARAMETER WHEN THE PARAMETER VALUE TYPE IS VALUE
Description	If you manually enter the parameter in the Parameter field instead of using the OraSearch functionality while defining eligibility for a price list, the system does not display the text box in the Parameter Value column when the Parameter Value Type is set to Value .
Workaround	None

Issue	ERROR OCCURS ON USING A VALUE WITH HYPHEN FOR A CHARACTERISTIC TYPE
Description	At present, an error occurs on a screen where a characteristic value with hyphen (-) is defined for a characteristic type.
Workaround	None

Issue	AN ERROR OCCURS ON THE TEMPLATE SEARCH WINDOW
Description	If you do not specify at least one account selection template while defining a construct, an error occurs indicating that at least one account selection template must be specified. Now, when you search for an account selection template using the Search icon corresponding to the respective field, the Template Search window appears with the same error (indicating that at least one account selection template must be specified). The system should not display any error in the Template Search window.
Workaround	None

Issue	DISPUTE AMT AT BILL LEVEL INCORRECT WHEN BILL SEGMENT OF PREVIOUS BILL CANCELED
Description	If a bill segment of the previous bill is canceled and you create a dispute request against an account for the corresponding next bill, the dispute amount displayed against the bill in the Dispute Details zone is incorrect.
Workaround	None

Issue	SAVE BUTTON IS ENABLED WHEN A BILL IS IN THE COMPLETE OR CANCELED STATUS
Description	The Save button in the Page Title area on the Bill screen should be disabled when a bill is in the Complete or Canceled status. However, at present, the Save button is enabled when a bill is in the Complete or Canceled status.
Workaround	None

Issue	APAYCRET BATCH DOES NOT CONSIDER ADJUSTMENTS WHICH ARE CREATED ON COMPLETED BILL
Description	If an adjustment is created on a completed bill, the Automatic Payment Creation (APAYCRET) batch creates automatic payment for the bill without recalculating the bill amount which is impacted due to the adjustment. However, the payment distribution algorithm applies automatic payment against the revised bill amount (i.e. original bill amount + adjustment). In such case, if there is any excess credit, the payment is applied against the overpayment contract.
Workaround	None

Issue	APAYCRET BATCH DOES NOT CONSIDER ECR ADJUSTMENTS CREATED ON PENDING BILL
Description	You can only use an adjustment type where the Print by Default and Impact Next Bill Balance check boxes are not selected to create transfer adjustment while distributing earnings credit rate. Therefore, an ECR adjustment created against a pending bill is not stamped on the bill. As a result, the Automatic Payment Creation (APAYCRET) batch creates automatic payment for the bill without considering the ECR adjustment.
Workaround	None

Issue	PERCENTAGE (%) WILDCARD NOT ALLOWED IN PERSON NAME WHILE SEARCHING FOR AN ENTITY
Description	The system does not allow you to specify the Percentage (%) wildcard in the Person Name field while searching for any entity across application. At present, the system automatically appends the criteria in the Person Name field with the Percentage (%) wildcard and accordingly searches for the entity.
Workaround	None

Insurance

Issue	OLD INSURANCE FEATURES ARE NOT TESTED AND VERIFIED IN ORMB VERSION 2.6.0.0.0
Description	In this release, the new policy data model is introduced. The old policy data model which is accessible to the INADMIN user group is no longer operational. The old insurance features, such as Insurance Control Central, Deferred Revenue Recognition, Account Current, Pay Plan, Group Billing, and List Bill Reconciliation are not tested and verified with the new policy data model.
Workaround	None

Issue	PERFORMANCE ISSUE WHILE CREATING DEFERRED REVENUE RECOGNITION SCHEDULE
Description	If there are large number of bill segments and adjustments for which deferred revenue recognition schedule must be generated, the system takes long time to generate deferred revenue recognition schedules.
Workaround	None

Issue	VALIDATION FOR FIDUCIARY CONTRACT MISSING DURING RECONCILIATION
Description	While changing the status of the reconciliation object to Ready To Pay, the system does not validate whether fiduciary contract exists for the group account.
Workaround	You need to ensure that group customer has fiduciary contract associated with the account through which payments can be made for the list bills.

Issue	TWO BILL SEGMENTS GENERATED WHEN REASON CODE EFFECTIVE DATE IS SAME AS BILL SEGMENT START DATE
Description	When you select the Update option from the Reason Code list and specify the reason code effective date same as the bill segment start date, the system creates two bill segments – one with prorated billed amount and another with prorated reported amount. Ideally, the system should only create one bill segment with prorated reported amount.
Workaround	None

Issue	UNABLE TO DISTRIBUTE THE REMAINING PAYMENT MANUALLY
Description	If you have distributed partial payment automatically through the Payment by Transaction screen, the system does not allow you to distribute the remaining payment manually.
Workaround	None

Issue	FOREIGN KEY AND FILE LOCATION CHARACTERISTIC TYPE NOT SUPPORTED IN UI MAPS
Description	The screens created using the UI map do not support the Foreign Key Value and File Location Value characteristic types. These screens only support the Adhoc Value and Predefined Value characteristic types.
Workaround	None

Issue	CHARACTERISTIC TYPES ARE NOT FILTERED BASED ON THE REASON CODE
Description	While editing the reconciliation object line, the characteristic types are not filtered based on the reason code that you have selected. Currently, it lists all characteristic types where the characteristic entity is set to Reason Code .
Workaround	None

Issue	RECONCILIATION DOESN'T WORK PROPERLY FOR PASS THROUGH BILLABLE CHARGES
Description	In the sample case workflow, the system checks whether the difference between the reported and billed amounts is within the tolerance limit. If so, the system must change the status of the reconciliation object line to WD-Match . However, at present, in case of pass through billable charges, the system changes the status of the reconciliation object line to Manual instead of WD-Match .
Workaround	None

Issue	ERROR OCCURS WHEN YOU RESOLVE A RECONCILIATION OBJECT LINE FROM THE CASE SCREEN
Description	The system allows you to manually resolve a reconciliation object line from the Case screen and change the status of the reconciliation object line to Manual Match . At present, an error occurs when you click the Manual Match button in the Case screen.
Workaround	None

Issue	OVERRIDE DESCRIPTION APPEARS INSTEAD OF DESCRIPTION IN THE SOURCE SYSTEM LIST
Description	At present, the override description of the source system appears in the Source System list instead of the description when you select the Policy option from the Search By list in the Customer 360-Degree View screen.
Workaround	None

Documentation

Issue	"ERROR 500--INTERNAL SERVER ERROR" - ONLINE HELP IS NOT WORKING
Description	<p>At present, an error occurs when you access online help for the following screens:</p> <ul style="list-style-type: none"> • Account Collection Summary • Account Current • Charge Type • COBOL Program • Collection Control Central • Contract Relationship Type • Contract Type - Charge Type Mapping • Contract Type - Pay Plan Template Mapping • Deferred Revenue Recognition Schedule • External Statement • FK Validation Summary • Invoice Frequency • Pay Plan Template • Policy (P&C) • Reason Code • Reconciliation Object • Reconciliation Object Line Status • Unit of Measure
Workaround	None

Issue	ONLINE HELP NOT AVAILABLE FOR SOME SCREENS OR TABS
Description	<p>At present, the online help is not available for the following screens:</p> <ul style="list-style-type: none"> • Collection Type • Loan • Request • Request Type (where Owner is Base) <p>In addition, the online help is not available for the following tabs:</p> <ul style="list-style-type: none"> • Rate Schedule – SQ Rule Tab
Workaround	None

Issue	INDEX ENTRIES NOT DEFINED FOR THE BANKING AND INSURANCE MODULES
Description	At present, index entries are not defined for all topics in the Banking and Insurance modules.
Workaround	None

Issue	2.4.0.1.0 BILL TOLERANCE AND CONSTRUCT RELATED CHANGES NOT REFLECTED IN BANKING USER GUIDE
Description	At present, the Bill Tolerance and Construct related changes which were incorporated in 2.4.0.1.0 are not yet reflected in the 2.6.0.0.0 Banking User Guide which is available on OTN.
Workaround	None

Issue	CONTENT ADDED IN STEPRERESULT AND INFO TAGS IS DISPLAYED IN BOLD
Description	At present, the content added within the STEPRERESULT and INFO tags is displayed in bold in the online help. This behavior is observed in Oracle Help and not in SPLHelp.
Workaround	None

Issue	COMMENTS NOT COPIED IN MAIL WHILE SUBMITTING FEEDBACK TO THE DOCUMENTATION TEAM
Description	The feedback entered in the Comments text box is not copied to the mail while submitting the feedback form in Oracle Help.
Workaround	You will have to manually add the comments in the e-mail before sending the feedback to the documentation team.

Technical Support

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