



## Oracle Financial Services Enterprise Case Management Application Pack v8.0.0.0.0 Minor Release 8.0.7.0.0

This ReadMe has the following sections:

[Description](#)

[Prerequisites](#)

[How to Apply This Release?](#)

[New Features](#)

[Known Issues/Limitations in This Release](#)

### Description

Oracle Financial Services Enterprise Case Management (OFS ECM) Application Pack v8.0.0.0.0 Minor Release #7 8.0.7.0.0 (**ID 29008204**)

This release of OFS ECM Application Pack is cumulative of all enhancements and bug fixes done since **v8.0.0.0.0** release.

### Prerequisites

Release 8.0.7.0.0 of Oracle Financial Services Enterprise Case Management is not fully backward compatible with earlier versions of FCCM applications. You must upgrade all of your FCCM applications from existing 8.0.x versions to 8.0.7.0.0 version and cannot choose to upgrade only selective application packs to v8.0.7.0.0.

## How to Apply This Release?

For detailed instructions on installing this OFS ECM Release, see [OFS ECM Application Pack Installation Guide 8.0.7.0.0](#).

## New Features

The following is the list of new features incorporated in this release. For detailed information on usage of these features, see various [OFS ECM Application Pack Guides](#).

- **Request for Information (RFI):** This new features allows individuals to send emails from a case and have the recipient respond to a questionnaire included in the email. This task can be a status changing action to allow for the sending and response to update the status of the case. Attachments can also be included in the emails sent.
- **PGX Correlation Tab (Gen 3):** This new correlation tab allows for viewing events that are correlated using the PGX correlation engine. It can be added to a case through Case Designer. This tab gives end user overview of the correlated entities and events generated for these entities in a graph.
- **Correlation Tab Updates (Gen 2):** Updates have been made to the existing correlation tab to provide better insight into why events have correlated. Columns have been added to the correlation grid so end users can easily relate the relationship between the correlated events focal entities and their common entities.
- **Attachment/Comment Service:** Ability to send attachments and/or comments via web service to be included as case evidence
- **Document Attachment:** Users can attached more than one document at a time by holding down the CTRL key.
- **Real-Time Event Creation Service:** Web service for creating, in real-time, into the consolidation layer, creating a case for the ingested event and extending the ingested event to a case.
- **Case Allocation:** Ability to define rules for automatically assigning cases to individuals at each step in the investigation process.
- **Case Name Configuration:** Configurable formats for automatically creating the name of a case based on events correlated into the case.
- **Removed Required Fields for Manually Created Entities:** When manually creating and adding a business entity to a case unnecessary required fields have been removed.
- **Updates to Send Email Functionality:** Enhancements have been made to the existing Send Email functionality. Users can now include attachments in the email and the email body can be in rich text.
- **Search Result Column Configuration:** Client now have the ability to configure the columns that are returned in the case search results for each case type. When searching across multiple case types that have different results, a default set is shown.
- **Derived Case Attributes:** Clients now have the ability to derive a case attributes for display in the case context. The 'derived' case attribute type allows SQL to be written which will pull the value into the case context as read-only.

- **External Entity Updates:** Updates to how external entities are displayed have been made to the External Entities business data tab, when viewing external entities on the Event Details tab, when searching external entities in a case and when manually adding them to an event. Users now see detailed information about each of the external entities.
- **Narrative Updates:** On the Narrative tab users now see a display of all risk relevant events and all involved parties. This helps reduce the need to access other pages when writing the narrative.
- **Retain Case List Display:** Case list display is retained when the user returns to the search results from the case details.
- **Workflow Monitor:** The Process Modeling Framework Process Monitor is now accessible from within a case so the user can see where the case is in the defined workflow. This is permission controlled.
- **Case Assignee and Case Owner:** When selecting the Case Assignee and Case Owner, the users listed are only those that can take an action in the resulting status. In addition, when viewing the dropdown lists of names, the user ID of the individual can be appended to the name. This helps ensure that individuals with like names are distinguishable. The format of the name and ID is configurable.
- **Related Event Filtering:** Users can filter the Related Events section of the Relationship tab to see All Events, Events in Case and/or Uncorrelated Events
- **Manual Event Creation:** When adding a manual event to an existing case, users can select to search only on entities that are on the case instead of all entities in the data model. The jurisdiction and domain of the entity being added defaults to the jurisdiction/domain of the case but can be manually changed. Both features make creating manual cases easier.
- **Involved Party Relationship Type:** The relationship types displayed when setting an Involved Parties dropdown are configurable during implementation so clients can use their specific values.
- **Integration of FATCA with ECM –** FATCA application now leverages PMF and Case Designer to define and maintain FATCA ECM workflow and Case Type definition.
- **Narrative tab is optional in Case Designer:** Users can now select which operational tabs should be displayed for a Case Type. Operational tabs include – Narrative, Evidence, Relationship, Audit, and Network Analysis.
- **ECM Action Validation Framework –** Enhancements have been made to allow users to define validations where validation rules needs to read the values selected by the user on the Take Action window.
- **Case Designer "Workflow" Section:** The Available Workflow and Selected Workflow selection boxes now display values in the following format *“Workflow name (Process ID, Version number)”* to make it easier to identify workflows.
- **Case Create Date:** The case create date now displays the time in addition to the date
- **Case Designer Auditing:** All changes made in Case Designer are now audited and available in the database.
- **Default Case Sort:** The default case sort is now due date, priority and then case id
- **Default Event Sort:** The event sort on the Event Details tab is now by events with no event decision, then risk relevant events, the risk irrelevant event and then generation date.

For more information on the OFS AAI requirements, see [OFS Advanced Analytical Applications Infrastructure Application Pack](#).

## Known Issues/Limitations in This Release

The known issue / limitation in OFS ECM Release 8.0.7.0.0 is as follows:

**Table 1: List of Known Issues**

Bug ID	Description
29024022	Clear preference in matches list grid does not work and when saved result in "user preference reset failed" notification
28074889	Performance of ECM Application on IE version 11 is slow when opening business data tabs while viewing a case and on select modal window in business data tabs. This issue is not seen in Microsoft Edge and Google Chrome.
29010978	Display and performance issues when setting records per page to be more than 150 records for Case search results.
28999826	Display issues when showing validation message when sending an email or RFI that as no email subject
28999797	User received a 'Save Failed' message and no validation message when trying to send an RFI for a case type that has no RFI questionnaire associated with it.
28989749	When using the real time event creation service to also have a case created, if the event has a score that contains a decimal the case is not created
28896863	Validation and tool tip issues after editing select fields on an External Entity which has already been manually added and then edited.
28884116	Entering amounts that are over 16 characters is being saved as a rounded value to the next 100
28647742	If a grid has no records to display and the user drags any column to be the first column, the following is displayed in the grid, "<span class='aai-no-data'></span>No Records Found "

Bug ID	Description
28637265	When viewing Workflow Monitor from within a case there are icons displayed, (edit, refresh , settings, download) which do not perform any action.
28529719	Display issues with Account removal process and how the number of records per page are displayed
28350075	After adding an entity as an Involved Party, if then removed from the involved party tab the entity cannot be re-added as an involved party from that entities tab. Validation message indicates that it already exists,
28291948	No response when trying to save a change to on the Save Metadata utility after making a change to a case type in Case Designer
28047607	On the Financial tab, if a grid is returning no records it is showing no records instead of showing 'no records found'
28042145	When viewing a case, on first load of the Narrative tab the rich text icons are not disabled indicating that the Narrative can be edited.
28019840	Case ID field is not sorting sequentially when showing more than 1000 records.
27549686	Record is remaining checked after moving to a different page, performing an action, and then returning to that page
27544870	On the transaction tab, if a transaction is manually added the details link does not display as hyperlink until the page is refreshed
27335545	Display issues with tooltip and node label on Network Analysis tab. Refresh is required when a new node is added
28995152	Tables are missing in Case schema, which are required for KYC view.
29028636	When creating cases for events using PGX correlation by disabling correlation required flag, cases are not created.