Oracle Financial Services Enterprise Case Management Application Pack v8.0.7.0.0 Maintenance Level Release # 1 (8.0.7.1.0)

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Description

Oracle Financial Services Enterprise Case Management (OFS ECM) Application Pack v8.0.7.0.0 Minor Release #1 8.0.7.1.0 (Patch ID 30369816)

This release of OFS ECM Application Pack contains the following:

- Cumulative of all enhancements and bug fixes done since v8.0.7.0.0 release includes all patches up to v8.0.7.0.51
Excluding the below patches

  - v8.0.7.0.35
  - v8.0.7.0.37
  - v8.0.7.0.42

- v8.0.7.0.50

- Includes all enhancements, fixes and updates delivered in v8.0.8.0.0

- Includes additional enhancements, fixes and updates outlined below

Verified Upgrade Paths:

1. ECM 8.0.7 + BD 8.0.7 + ECM 8.0.7.1ML

2. BD 8.0.7 + ECM 8.0.7 + All patches till ECM 8.0.7.0.11 + ECM 8.0.7.1ML

3. BD 8.0.7 + ECM 8.0.7 + All patches till ECM 8.0.7.0.16 + ECM 8.0.7.1ML

4. BD 8.0.7 + ECM 8.0.7 + All patches till ECM 8.0.7.0.30 + ECM 8.0.7.1ML

5. BD 8.0.5 + BD 8.0.5.0.78 + ECM 8.0.5 + all patches till ECM 8.0.5.0.27 + BD 8.0.7 + ECM 8.0.7 + all patches till ECM 8.0.7.0.30 + ECM 8.0.7.1.ML

Prerequisites

1. OFSECM 8.0.7.0.0 (Patch ID 29008204) - OFS ECM APPLICATION PACK V8.0.0.0.0 MINOR RELEASE #7 (8.0.7.0.0)

2. OFSAAI 8.0.7.2.0 (Patch ID 29920053) - OFSAA 8.0.7.0.0 AAI Maintenance Level RELEASE #2 (8.0.7.2.0)

3. Apply the one-off patch 30279865 from My Oracle Support http://support.oracle.com/.

How to Apply This Release?

For detailed instructions on installing this OFS ECM Release, see OFS ECM Application Pack Installation Guide 8.0.7.1.0.

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.

- **QC Sampling Framework:** The QC Sampling Framework enables clients to define case sampling rules to collect candidate cases and then apply percentages to randomly select those cases that should be QA'ed. Cases can then be assigned using Advanced Case Allocation rules and reviewed as part of the case's workflow.

- **Always Available Narrative:** On the Narrative, users can now 'pop-out' the text area so it is available in edit mode when navigating to others areas of the case.

- **Updates to Relationship Tab:** Updates have been made to the related cases and events sections on the Relationship tab. Additional fields have been added to provide clarity. When searching for manual cases more search options and additional information on the results help individual locate cases more easily.

- **Audit History Updates:** Filtering to find specific audit records has been improved. It is also now possible to allow select user roles to see select actions.

- **Read-Only Case Types:** Clients can now grant users permission to access some case types in a read-only format (user cannot make any changes to a case of this type) in addition to the case types in which they have full access .

- **RFI Respondent Attachments:** Individuals who are responding to an RFI now have the ability to include attachments. These attachments will be seen in the RFI section on the Evidence tab.

- **Role-Controlled Tabs:** Clients can configure ECM case types to display select tabs based on user's role.

- **Case Status as a Security Restriction:** In addition to existing security restrictions, clients can now restrict access to cases based on case's status. This restriction applies to the case list displayed on the Case Search and List page as well as the Relationship Tab.

- **Case Relationship Reason:** On the Relationship tab in the Related Cases, users can now understand what entity on the related case is associated with the current case. This allows the user to understand the nature of the relationship by providing the common entities between the two cases.

For more information on file updates, see [Modified Files](#).

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

List of Issues Fixed in This Release

- **RFI Status Updates:**

  - When a user responds to an RFI, the case status is updated immediately and the response is tracked on the Audit History and Evidence tab immediately. Users do not need to wait for the RFI batch process to facilitate these updates anymore.

  - If an RFI is currently pending and another is sent to another user the action is recorded in the Audit History and the status of the case will not progress until a response is received for all RFIs.

- **Obsolete Case Statuses:** Statuses in KDD_STATUS that are not being used can be marked as "obsolete" in the database. This allows users to exclude obsolete statuses from being used by ECM while retaining those status records in the database for future for historical uses.

- **Attachments on Evidence Tab:** The attachments section on the Evidence tab now displays all attachments added to a case through both Add Evidence and Take Action. Attachments added through out-of-box email actions (Send RFI, Send Email) are shown in their own section on the Evidence tab.

- **Narrative History Column Adjustment:** The columns displayed in the Narrative History grid no longer require adjustment to be viewed.

- **Preference Save on Event List and Transaction Grids:** On the Event Details and Transaction Tabs, the grid preferences can now be saved.

- **Transaction Record Count:** On all transaction grids, the default number of records displayed is now 50. This is to reduce the need to paginate to see all records.

- **Default Related Events Selection:** On the Relationship tab in the Related Events grid, the default select has been changed from 'Events In Cases' to 'All Events'. This can be configured in the Install Parameters.

- **Updates to Help with System Performance:** The following updates have been made to help with system performance.

  - In Case Search, by default, the case creation date range is set to look back seven days. This date range can be removed or edited for any search. The creation of Save Views can also be implemented to modify these values.

  - The existing Narrative/Comment search field has been split into two separate fields.

  - When searching on a Narrative or Comment the user must provide a case creation date range.

  - On the business entity tabs, the full details of the entity are not loaded by default. The entity list and the Details section are shown but the user must first select the entity from the list and then select 'View Details' to see all information of that entity. This is applicable to tabs for the following entities: Account, Customer, External Entity, Correspondent Banks, Employee, and Household.

- **Allowing Multi-Select in the Derived Attribute:** Multi-selection in derived attribute (optional attributes) will be saved for Case Create screen.

Known Issues/Limitations in This Release

The known issues/limitations in OFS ECM Release 8.0.7.1.0 are as follows:

Table 3: List of Known Issues

Bug ID	Description
29840638	Narrative History pagination does not display correctly if the narrative is edited more than 20 times.

Bug ID	Description
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.
29805803	In the Questionnaire Library, when linking a question to a questionnaire, the 'Is Document Required' checkbox is disabled and cannot be activated.
29690924	The Big Data tag existing in the ECM PatchConfig.xml even though ECM does not have a feature with respect to big data. As long as ECM installation instructions are followed this is not an issue.
30209920	Narrative tag flickers for a few seconds when scrolling down
30131137	In Chrome and Firefox, there are navigation issues when viewing online help
30113390	When additional columns are added to the Case Search results, the bottom row is cut off part of the way.
30029367	On Set home page, UI shows - invalid request/error while processing request
30099006	Once the user has accessed the ECM application, the hamburger menu in the upper left does not show the menu items. The user needs to return to the home page in order to access other applications.
30054607	Case Allocation will assign cases to users who only have read-only access to cases
30244552	3rd party Customer Screening events which are brought in through the landing are not being displayed in the ECM UI on the Event Details. The batch runs successfully, and the events are added to a case, but they cannot be viewed in the UI.
30153337	3rd party Trade Based AML events which are brought in through the landing are not being displayed in the ECM UI on the Event Details. The batch runs successfully, and the events are added to a case, but they cannot be viewed in the UI.