



## Oracle Financial Services Enterprise Case Management Application Pack v8.0.7.0.0 Maintenance Level Release #2 (8.0.7.2.0)

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### Description

Oracle Financial Services Enterprise Case Management (OFS ECM) Application Pack v8.0.7.0.0 Minor Release #2 8.0.7.2.0 (Patch ID 32405565)

This release of OFS ECM Application Pack contains the following:

- Cumulative of all enhancements and bug fixes done since v8.0.7.1.0 to v8.0.7.1.27
- Includes additional enhancements, bug fixes outlined in [List of Issues Fixed in This Release](#)

### Verified Upgrade Paths:

1. ECM 8.0.7.0.30 + AAI 8.0.7.5.0 ML is successfully upgraded to OFS ECM 8.0.7.2.0 ML

2. ECM 8.0.7.0.57 + AAI 8.0.7.5.0 ML is successfully upgraded to OFS ECM 8.0.7.2.0 ML
3. ECM 8.0.7.1.0 + AAI 8.0.7.5.0 ML is successfully upgraded to OFS ECM 8.0.7.2.0 ML
4. ECM 8.0.7.1.3 + AAI 8.0.7.5.0 ML is successfully upgraded to OFS ECM 8.0.7.2.0 ML
5. ECM 8.0.7.1.25 + AAI 8.0.7.5.0 ML is successfully upgraded to OFS ECM 8.0.7.2.0 ML

## How to Apply This Release?

For detailed instructions on installing this OFS ECM Release, refer to [OFS ECM Application Pack Installation Guide 8.0.7.2.0](#).

## New Features

The following is the list of new features incorporated in this release. For detailed information on usage of these features, see the 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 individuals locate cases more easily.
- **Audit History Updates:** Filtering to find specific audit records has been improved. It is 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 to 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 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 in the Related Cases 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, refer to [Modified Files](#)

## 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 should not wait for the RFI batch process to facilitate these updates anymore.
  - Each RFI email is recorded in Audit and Evidence tab. The status of the case will not progress until the 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 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 List 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.

The list of issues fixed in OFS ECM release 8.0.7.2.0 are as follows:

**Table 1: List of Resolved Issues**

Bug ID	Resolution
32589379	Linked Events grid data is out of line in the grid on the Relationship tab.
32589249	When viewing 'other cases', the involved party is linked to the data is not correct in Narrative>>Involved Party>>History
32319932	Document Upload through API was hardcoded to 5MB. It now references the DOCUMENT_MAX_SIZE INSALL Parameter.
32428846	User is unable to remove tabs for a case type definition in case designer.
32382571	User getting error when searching by entity name without select "Entity Type" in Entity Search Utility.
32377189	ECM users are not able to by customer ID if the name includes a space.
31794807	The keyword is replaced by case status when the free text comment is stored in the system.
31378453	Improved performance of Relationship tab.
31370884	Case search list was not retaining storing when returning to list from details.
31120856	Preference page is hanging when user saves a view that is longer than allowed.
30697644	'UPDATED ON' date is not updated when editing an account for an event is manually added to a case.
30694099	Narrative date and Time header is not aligned properly under Narrative history page.
30693982	Able to perform save operation without any comments when adding evidence to a case.
30692828	Multiple UI issues occurring on the case details screen when regression testing

Bug ID	Resolution
30615945	When one account is selected to add an account to a case, multiple accounts are displayed and add.
30643836	When viewing fields in the column section of a grid, few columns are not visible as they are outside the browser window.
30677932	Pagination error message is not displaying when user tries to populate more than hundred records in a single page.
29201706	Searching cases based on Narrative comments does not fetch case results.

## Known Issues/Limitations in This Release

The known issues/limitations in OFS ECM Release 8.0.7.2.0 are as follows:

**Table 2: List of Known Issues**

Bug ID	Description
29840638	Narrative History pagination does not display correctly if the narrative is edited more than 20 times.
28074889	Performance of ECM Application on IE version 11 is slow when opening business data tabs while viewing a case and on selecting 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.

Bug ID	Description
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	When users tried to set their home page in the preferences option they receive invalid request/error while processing message
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 area, 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 area, 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.