Oracle Financial Services Enterprise Case Management Release v8.1.2.3.0

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Description

Bug ID 34647700 – OFS ECM v8.1.2.0.0 MINOR RELEASE #3 (8.1.2.3.0).

The Oracle Financial Services Enterprise Case Management (OFS ECM) version 8.1.2.3.0 ML is cumulative of all bug fixes & enhancements done since the 8.1.2.0.0 release, and it can be directly applied to ECM 8.1.2.0.0 version.

Prerequisites

Before applying OFS ECM v8.1.2.3.0, it is required to install OFS ECM v8.1.2.0.0. For detailed instructions on installing this OFSECM Release, see OFS ECM Application Pack Installation Guide 8.1.2.0.0.

How to Apply This Patch?

- For detailed instructions on installing the OFS ECM 8.1.2.3.0 release, see [OFS ECM ML Installation Guide]
- For Pack on Pack installation, apply **Bug 34637484 - Oracle Financial Services Behavior Detection Platform 8.1.2.3.0 ML**. This is to accommodate enhancement **ECM 8122: To View the Next Periodic Re-review on KYC Case Context Screen**.

About This Release

This section describes the new features and known issues in this release of OFS ECM.

Topics:

- New Features
- Known Issues

New Features

The following is the list of new features included in this release:

- When searching and adding customers or accounts to a Case, users can search by multiple values via the SSN and EIN fields. These values should be separated by commas.
- Users who have enabled Quantifind integration can view an updated Quantifind scorecard provided by Quantifind.
- The 'Alerted Party' tab name has been renamed to 'Entities' for better representation of the information which is being presented.
- Regardless of the Case's status, users can create an Event from within the Case.
- Users can view the audit history of changes made when an entity is edited. This is available for Case header information (including optional case attributes), Accounts, External Entities, Customers, and Transactions. Users can view who made the changes, when the change was made, what fields were altered, and the value it was changed from and to.

- When there are no assignment rules defined, the Auto-assignment checkbox is disabled in the Create Case screen.
- When viewing an account on the Alerted Parties tab, a new column - Primary Customer - is introduced, which displays the name of the primary customer for that account.
- Even if the recipient of the RFI has not responded, the Questionnaire link in the Evidence tab is displayed. This enables the users to view which questionnaire was sent even if a response was not submitted.
- Customer case attributes that are single-select dropdowns now do not have a value selected by default when they are displayed on the Case Search screen.
- For Quantifind Customer Extract, users can apply both default and custom filters in the Custom Filter. This reduces the implementation work by not requiring all default filters to be recreated along with the custom filters.
- When viewing the Account Summary and Customer Summary, users can select to display the functional currency of all values in addition to the base currency.
- When viewing a Customer and an External Entity on the Customer and External Entity tabs, users can now see what other parties are related to the Customer and External Entity as defined in the Party-to-Party table.

Known Issues

The following table provides the list of known issues in this release.

Table:1 List of Known Issues

Bug ID	Description
34894317	The Send RFI functionality does not trigger emails in the Websphere Server version 9.0.0.11.