Oracle® Banking Enterprise Product Manufacturing

Functional Upgrade Guide

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Preface

This guide covers the impacts of upgrading the functionalities of Oracle Banking Enterprise Product Manufacturing from Release 2.6.2.0.0 to Release 2.7.0.0.0.

This preface contains the following topics:

- Audience
- Documentation Accessibility
- Related Documents
- Conventions

Audience

This guide is intended for the users of Oracle Banking Enterprise Product Manufacturing.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/us/corporate/accessibility/index.html.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/us/corporate/accessibility/support/index.html#info or visit http://www.oracle.com/us/corporate/accessibility/support/index.html#trs if you are hearing impaired.

Related Documents

For more information, see the following documentation:

- For installation and configuration information, see the Oracle Banking Enterprise Product Manufacturing Installation Guide - Silent Installation.
- For a comprehensive overview of security, see the Oracle Banking Enterprise Product Manufacturing Security Guide.
- For the complete list of licensed products and the Third Party licenses included with the license, see the Oracle Banking Enterprise Product Manufacturing Licensing Guide.
- For information related to setting up a bank or a branch, and other operational and administrative functions, see the Oracle Banking Enterprise Product Manufacturing Administrator Guide.
- For information related to customization and extension, see the Oracle Banking Enterprise Product Manufacturing Extensibility Guide for Host, SOA, and UI.
- For information on the functionality and features, see the respective Oracle Banking Enterprise Product Manufacturing Functional Overview document.

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1 Overview

This guide covers the functional impacts of upgrading Oracle Banking Enterprise Product Manufacturing from Release 2.6.2.0.0 to Release 2.7.0.0.0. If a functionality has an impact while upgrading from the previous version, the impact and related maintenances are included in this guide.

2 Upgrade Impacts

This chapter describes the upgrade impacts for different pages of Oracle Banking Enterprise Product Manufacturing.

2.1 Product Manufacturing

This section describes the upgrade impacts of functionalities in Product Manufacturing.

2.1.1 Define CASA Bank Policy (Fast Path: PM002)

The upgrade impact is as follows:

Table 2–1 Define CASA Bank Policy - Data Elements

Data Element Label Name	Type (New / Modified / Dropped)	Impact of Change on Migration	Remarks
Initial Pay-In to be funded within (No. of days)	New	No Impact as it is an optional field.	

2.1.2 Define CASA Offer

The upgrade impacts are as follows:

Table 2–2 Define CASA Offer - Data Elements

Data Element Label Name	Type (New / Modified / Dropped)	Impact of Change on Migration	Remarks
Quote Parameters/ Auto-close Account on Quote Date	New	No Impact as it is a non-mandatory field.	
Allowed Facilities / Rate Refresh Basis	New	No Impact as it is an optional field.	
Account Interest Index	New	No Impact as it is an optional field.	
Rate Refresh Frequency	New	No Impact as it is an optional field.	
Default Rate Refresh Frequency	New	No Impact as it is an optional field.	
Refresh Basis	New	No Impact as it is an optional field.	
Start Month	New	No Impact as it is an optional field.	

Data Element Label Name	Type (New / Modified / Dropped)	Impact of Change on Migration	Remarks
Date Preference	New	No Impact as it is an optional field.	
Default Date Preference	New	No Impact as it is an optional field.	

2.1.3 Define CASA Product

The upgrade impacts are as follows:

Table 2–3 Define CASA Product - Data Elements

Data Element Label Name	Type (New / Modified / Dropped)	Impact of Change on Migration	Remarks
Repayment Holiday permissible count- (No. of Times)	New	No Impact as it is non-mandatory field.	
In Years	New	No Impact as it is non-mandatory field.	
Arrear Treatment Preferences	Modified	In the Update mode, the fields is made as non-modifiable. There is no impact in the migration.	
Rate Refresh Basis	Dropped	As part of Migration, the field is to be updated at CASA Offer level.	

2.1.4 Define Credit Policy (Fast Path: PM009)

The upgrade impacts are as follows:

Table 2–4 Define Credit Policy - Data Elements

Data Element Label Name	Type (New / Modified / Dropped)	Impact of Change on Migration	Remarks
Facility Category	Modified	No Impact as the field introduced in Facility Category is optional based on selection of which the validation is required in Credit Policy.	
IO Period Validation Required for Construction Loans	New	No Impact as it is non-mandatory field.	

Data Element Label Name	Type (New / Modified / Dropped)	Impact of Change on Migration	Remarks
Maximum Construction Period	New	No Impact as it is non-mandatory field.	

2.1.5 Define Affinity (Fast Path: PM042)

The upgrade impacts are as follows:

Table 2–5 Define Affinity - Data Elements

Data Element Label Name	Type (New / Modified / Dropped)	Mandatory / Optional	Remarks
Additional Information	New	No Impact as it is a non-mandatory field.	
External Reference ID	New	No Impact as it is a non-mandatory field.	
Term and Condition	New	No Impact as it is a non-mandatory field.	
Additional Document	New	No Impact as it is a non-mandatory field.	
Owner Information	New	No Impact as it is a non-mandatory field.	
Additional Product Information	New	No Impact as it is a non-mandatory field.	

2.1.6 Define Campaigns (Fast Path: PM024)

The upgrade impacts are as follows:

Table 2–6 Define Campaign - Data Elements

Data Element Label Name	Type (New / Modified / Dropped)	Impact of Change on Migration	Remarks
Additional Information	New	No Impact as it is a non-mandatory field.	
External Reference ID	New	No Impact as it is a non-mandatory field.	
Term & Condition	New	No Impact as it is a non-mandatory field.	
Campaign Icon	New	No Impact as it is a non-mandatory field.	
Additional Docu-	New	No Impact as it is a non-	

Data Element Label Name	Type (New / Modified / Dropped)	Impact of Change on Migration	Remarks
ment		mandatory field.	
Owner Information	New	No Impact as it is a non-mandatory field.	
Additional Information	New	No Impact as it is a non-mandatory field.	

2.1.7 Define Rewards (Fast Path: PM053)

The upgrade impacts are as follows:

Table 2–7 Define Rewards - Data Elements

Data Element Label Name	Type (New / Modified / Dropped)	Impact of Change on Migration	Remarks
Additional Information	New	No Impact as it is a non-mandatory field.	
External Reference ID	New	No Impact as it is a non-mandatory field.	
Term & Condition	New	No Impact as it is a non-mandatory field.	
Reward Icon	New	No Impact as it is a non-mandatory field.	
Additional Document	New	No Impact as it is a non-mandatory field.	
Owner Information	New	No Impact as it is a non-mandatory field.	
Additional Information	New	No Impact as it is a non-mandatory field.	

2.1.8 Define Loan Offer

The upgrade impact is as follows:

Table 2–8 Define Loan Offer - Data Elements

Data Element Label Name	Type (New / Modified / Dropped)	Impact of Change on Migration	Remarks
Maximum Number of Skip Instructions Allowed	New	No Impact as it is a non-mandatory field.	

2.1.9 Define Loan Product

The upgrade impact is as follows:

Table 2–9 Define Loan Product - Data Elements

Data Element Label Name	Type (New / Modified / Dropped)	Impact of Change on Migration	Remarks
Fee Treatment Preferences for Origination			
Fee Treatment	Modified	No Impact as it is a non-mandatory field.	The Deduct option has been enabled for the event OB_ BUNDLE_SUBSCRIPTION

2.1.10 Define Product Group

The upgrade impacts are as follows:

Table 2–10 Define Product Group - Data Elements

Data Element Label Name	Type (New / Modified / Dropped)	Impact of Change on Migration	Remarks
Allowed Term (This accordion is not shown if Origination workflow behavior is anything other than Asset.)	Modified	No Impact	
Credit Policy (Enabled only for Product Groups or Group of Groups that have Origination Workflow Behavior = Asset, Credit Card. If allowed product class is CASA then filter and show only those credit policies which have facility category type as Revolving.)	Modified	No Impact	

2.1.11 Define Schedule Type

The upgrade impact is as follows:

Table 2–11 Define Schedule Type - Data Elements

Data Element Label Name	Type (New / Modified / Dropped)	Impact of Change on Migration	Remarks
Maximum Interest	Dropped	There is no impact as no	

Data Element Label Name	Type (New / Modified / Dropped)	Impact of Change on Migration	Remarks
only Term allowed in months		validations were being performed based on the value in this field.	

2.1.12 Define Statements

The upgrade impact is as follows:

Table 2–12 Define Statements - Data Elements

Data Element Label Name	Type (New / Modified / Dropped)	Impact of Change on Migration	Remarks
Frequency Options Available	New	No Impact as it is an optional field.	

2.1.13 Offer Selector

The upgrade impact is as follows:

Table 2–13 Offer Selector - Data Elements

Data Element Label Name	Type (New / Modified / Dropped)	Impact of Change on Migration	Remarks
Lending Questionnaire	New	The Lending Questionnaire tab has been introduced for Credit Card in Origination. There is no impact of migration.	