

**Oracle Financial Services Revenue  
Management and Billing Cloud  
Service**

**OR**

**Oracle Insurance Revenue  
Management and Billing Cloud  
Service**

Release 8.1.1

**Release Notes**

Revision 1.4

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Oracle Financial Services Revenue Management and Billing Cloud Service/Oracle Insurance Revenue Management and Billing Cloud Service Release 8.1.1 Release Notes

**Note:** To improve the content readability, the above two products are collectively referred to as Oracle Revenue Management and Billing Cloud Service throughout this document.

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# Preface

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## About this Document

This document lists the feature enhancements and supported platforms and browsers in this release. It highlights different roles and responsibilities of Oracle and Customer in deploying, configuring, and maintaining the Oracle Revenue Management and Billing Cloud Service. It also highlights the known issues in this release.

## Intended Audience

This document is intended for the following audience:

- End-Users
- System Administrators
- Consulting Team
- Implementation Team

## Organization of the Document

The information in this document is organized into the following sections:

Section No.	Section Name	Description
Section 1	ORMB Cloud Service Release 8.1.1 Feature Enhancements	Lists the new features and enhancements introduced in the ORMB Cloud Service Release 8.1.1.
Section 2	Cloud Service Documentation	Explains how to access the documentation of the ORMB Cloud Service Release 8.1.1 from OTN or OHC.
Section 3	Documentation Updates	Provides the documentation updates for the ORMB Cloud Service Release 8.1.1.
Section 4	Supported Platforms and Browsers	Lists the operating system and browsers supported in this release.
Section 5	High-Level Roles and Responsibilities	Lists the different roles and responsibilities of Oracle and Customer in deploying, configuring, and maintaining the ORMB Cloud Service.
Section 6	Known Issues	Lists and describes known issues in this release.

## Conventions

The following conventions are used across the document:

Convention	Meaning
<b>boldface</b>	Boldface indicates graphical user interface elements associated with an action, or terms defined in the text.
<i>italic</i>	Italic indicates a document or book title.
<code>monospace</code>	Monospace indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or information that an end-user needs to enter in the application.

## Acronyms

The following acronyms are used in this document:

Acronym	Meaning
AI	Artificial Intelligence
LDAP	Lightweight Directory Access Protocol
ML	Machine Learning
ODA	Oracle Digital Assistant
OHC	Oracle Help Center
OIM	Oracle Identity Manager
ORMB	Oracle Revenue Management and Billing
OTN	Oracle Technology Network
OUAF	Oracle Utilities Application Framework
PDF	Portable Document Format
TFM	Transaction Feed Management

## Related Documents

You can see the following documents for more information:

Document Name	Description
<i>Oracle Revenue Management and Billing Cloud Service Licensing Guide</i>	Lists different features which are offered when you acquire a license for the following cloud services: <ul style="list-style-type: none"> <li>• Oracle Financial Services Revenue Management and Billing</li> <li>• Oracle Insurance Revenue Management and Billing</li> </ul> It also provides the licensing information of Oracle software and third-party JARs and components which are included in the above-mentioned cloud services.
<i>Oracle Revenue Management and Billing Cloud Service Federated Identity Configuration Using IDCS</i>	Provides an overview of federated SSO login. It explains how to configure federated SSO login with SAML for the ORMB Cloud Service.
<i>Oracle Revenue Management and Billing Cloud Service REST Services Configuration Guide</i>	Explains how to configure federated Web service login to access protected REST services on the ORMB Cloud environments.
<i>Oracle Revenue Management and Billing Cloud Service End-User Onboarding Using IDCS</i>	Explains how to setup the security administrator account for the ORMB Cloud Service. It also explains how to manage users and user groups for the ORMB Cloud Service. In addition, it explains how to import and export bulk users and user groups for the ORMB Cloud Service.
<i>Oracle Revenue Management and Billing Cloud Service SFTP Authentication and Access Permissions Guide</i>	Explains how to configure SFTP authentication for the ORMB Cloud Service. It also explains how to access the SFTP server using WinSCP, how to create the directories and files on the SFTP server, and how to set the read, write, and execute permissions for a file or folder on the SFTP server.
<i>Oracle Revenue Management and Billing Cloud Service OAS Reporting Solution</i>	Provides an overview of the ORMB SaaS reporting architecture. It also explains how to use Oracle Analytics Server (OAS) for ORMB SaaS reporting.
<i>Oracle Revenue Management and Billing Cloud Service Federated Identity Configuration Using IAM</i>	Provides an overview of federated SSO login. It explains how to configure federated SSO login with SAML for the ORMB Cloud Service.

Document Name	Description
<i>Oracle Revenue Management and Billing Cloud Service End-User Onboarding Using IAM</i>	Explains how to setup the security administrator account for the ORMB Cloud Service. It explains how to manage users and groups for the ORMB Cloud Service. In addition, it explains how to import and export bulk users and groups for the ORMB Cloud Service and how to use SAML on the Cloud environment for single sign-on.
<i>Oracle Revenue Management and Billing Chatbot Configuration Guide</i>	Explains how to integrate Oracle Digital Assistant (ODA) with the ORMB Cloud Service.
<i>Oracle Revenue Management and Billing Chatbot User Guide</i>	Explains how to use the menu based Chatbot introduced in the ORMB Cloud Service.
<i>Oracle Revenue Management and Billing ML Integration Guide</i>	Explains how to integrate Machine Learning (ML) with the ORMB Cloud Service for anomaly detection.

## Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

## Change Log

Revision	Last Update	Updated Section	Comments
1.1	20-Mar-2024	ORMB Cloud Service Release 8.1.1 Feature Enhancements	Updated Information
		Cloud Service Documentation	Updated Information
		Known Issues	Updated Information
1.2	08-May-2024	ORMB Cloud Service Release 8.1.1 Feature Enhancements	Added Information
1.3	05-Jul-2024	Cloud Service Documentation	Added Information
		Documentation Updates	Added Information
1.4	17-Sep-2024	Cover Page	Updated Information
		Copyright Notice	Updated Information
		Preface	Added Information
		ORMB Cloud Service Release 8.1.1 Feature Enhancements	Updated Information
		Cloud Service Documentation	Updated Information

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<b>Revision</b>	<b>Last Update</b>	<b>Updated Section</b>	<b>Comments</b>
		Documentation Updates	Updated Information
		Supported Platforms and Browsers	Updated Information
		Known Issues	Updated Information



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# ORMB Cloud Service Release 8.1.1 Feature Enhancements

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For more information about the new features which are introduced and the existing features which are enhanced in the ORMB Cloud Service Release 8.1.1, see the *Oracle Revenue Management and Billing Version 7.0.0.0.0 Release Notes*.

## Points to Note:

If you want to use the Apache FOP Reporting framework in ORMB, you need to set the **C1-REPORTVW** feature configuration. For more information, see the **Setting the C1-REPORTVW Feature Configuration** section in the *Oracle Revenue Management and Billing Version 7.0.0.0.0 Installation Guide*.

If you want to decrypt the encrypted files using the keystore in the File Upload Interface feature, you need to set the **C1-FLUPLD** feature configuration. For more information, see the **Setting the C1-FLUPLD Feature Configuration** section in the *Oracle Revenue Management and Billing Version 7.0.0.0.0 Installation Guide*.

The **Chatbot** and **Billing Anomaly Detection with Artificial Intelligence (AI) and Machine Learning (ML)** features are certified only on the Oracle Financial Services Revenue Management and Billing Cloud Services and not on the Oracle Insurance Revenue Management and Billing Cloud Services.

The **Billing Anomaly Detection with Artificial Intelligence (AI) and Machine Learning (ML)** feature is available only on the Oracle Financial Services Revenue Management and Billing Cloud Services where the reporting option is available.

# Cloud Service Documentation

User manuals and other technical documents are available in the Portable Document Format (PDF) format. You can download the ORMB Cloud Service release-specific documentation from either of the following locations:

- **Oracle Technology Network (OTN)** – You can access the ORMB Cloud Service release-specific documentation libraries from OTN using the following URL:

<http://www.oracle.com/technetwork/indexes/documentation/fsgbu-1364781.html>

It contains the **Documentation Library for Oracle Revenue Management and Billing Cloud Service** section. You can view and download a release-specific documentation library by clicking the **View Library** and **Download** links, respectively, corresponding to the respective version.

- **Oracle Help Center (OHC)** – You can access the ORMB Cloud Service release-specific documentation from OHC using the following URL:

<https://docs.oracle.com/en/industries/financial-services/revenue-management-billing-cloud-service/index.html>

The ORMB Cloud Service OHC page contains a drop-down list which allows you to select the ORMB cloud service release for which you want to access the documentation.

**Note:** Always ensure that you download latest revision of the document from **OTN** or **OHC**.

For feature documentation, see Oracle Revenue Management and Billing Version 7.0.0.0.0 Documentation. The following table lists and describes the different documents that will help you to understand the features offered in the Oracle Revenue Management and Billing Cloud Service Release 8.1.1.

Document Name	Description
<i>Oracle Revenue Management and Billing Version 7.0.0.0.0 Release Notes</i>	Provides a brief description about the new features, enhancements, and UI level changes introduced in the current release. The new features and enhancements are classified under three distinct heads – Generic (which is intended for both domains), Financial Services, and Health Insurance. It also contains high-level information about the supported platforms, framework upgrade, supported upgrades, and documentation updates. In addition, it contains a list of discontinued features, planned deprecation notices, customer bugs fixed or forward ported and known issues in the current release.

Document Name	Description
<i>Oracle Utilities Application Framework Business Process Guide</i>	Explains how to get acquainted with the user interface. It explains the different types of pages or portals that you may come across in the application. It explains how to set the user preferences and how to create, manage, assign, and complete a To Do in the application. It also explains how to submit reports and view historic reports in the application.
<i>Oracle Utilities Application Framework Administrative Guide</i>	Explains the general, security, user, designing, developing, and scripting options available in Oracle Utilities Application Framework (OUAF). It describes the user interface, database, configuration, and reporting tools available in OUAF. In addition, it provides information about the application viewer, how to configure incoming and outgoing messages, and how to integrate Lightweight Directory Access Protocol (LDAP), Oracle Identity Manager (OIM), and Batch Scheduler with Oracle Revenue Management and Billing (ORMB).
<i>Oracle Revenue Management and Billing Business Process Guide</i>	Explains how to maintain the demographic, geographic, and financial objects (i.e. accounts) of a customer. It explains how to manage a customer's bills, payments, adjustments, credits, collections processing, statements and deposits in Oracle Revenue Management and Billing (ORMB). It also describes the financial transactions, case management, sales and marketing functions, rates engine, quotations, loans, how to monitor and execute job streams, and how to manage workflows, notifications, and overdue processing. In addition, it explains how to extract the data from the system using an extract template.  The features listed and described in this document can be used in both financial services and health insurance domains.
<i>Oracle Revenue Management and Billing Administrative Guide</i>	Explains how to configure various features and functionalities in Oracle Revenue Management and Billing (ORMB). For example, billing, payments, adjustments, financial transactions, credits, collections processing, loans, service credits, background processes, quotations, case management, security, overdue processing, batch scheduler, workflow, and notifications, etc.  The information available in this document can be used in both financial services and health insurance domains.

Document Name	Description
<i>Oracle Revenue Management and Billing Banking User Guide</i>	<p>Describes various features which are available for the financial services business. For example, customer registration, customer 360° view, invoicing group, pricing management, multi-currency accounts, currency conversion, construct based billing and settlement, trial billing, product lifecycle management, subscription billing, mass pricing update, accrual, foreign exchange gain loss, transaction feed management, upload validated payment and adjustment data, freeze payments on notification, payment request, offset request, funding request, hold request, refund/write off request, dispute request, upload request, earnings credit rate, payment agreement request, invoice request, deal management, etc.</p> <p>It describes all screens related to these features and explains how to perform various tasks related to the feature in the application.</p>
<i>Oracle Revenue Management and Billing Insurance User Guide</i>	<p>Describes various features which are available for the following three lines of health insurance business – fully-insured group, self-funded, and individual. For example, customer registration, customer 360° view, pricing management, trial billing, transaction feed management, upload validated payment and adjustment data, freeze payments on notification, payment request, offset request, funding request, hold request, refund/write off request, upload request, payment agreement request, invoice request, inbound message processing, reconciliation, entity audit, premium repricing, etc.</p> <p>It describes all screens related to these features and explains how to perform various tasks related to the feature in the application.</p>
<i>Oracle Revenue Management and Billing Transaction Feed Management - Batch Execution Guide</i>	<p>Explains the sequence in which the batches should be executed while performing various tasks in the Transaction Feed Management (TFM) module.</p> <p>It provides detailed information about each TFM batch and its parameters. It also indicates the restart and multi-threading ability of each batch. In addition, it recommends values for various parameters which can be used for tuning batch performance as per the available hardware.</p>

Document Name	Description
<i>Oracle Revenue Management and Billing Batch Guide</i>	Provides detailed information about various batches which are used in different modules, such as billing, payments, financial transaction, pricing management, funding request, offset request, hold request, upload request, inbound message, payment agreement request, accruals, earnings credit rate, ILM, deferred revenue recognition, reconciliation, garbling, repricing, entity audit, statements, etc. It also contains information about the batch parameters and the batch restart and multi-threading abilities.
<i>Oracle Revenue Management and Billing FOP Reports Guide</i>	Explains how to extract data from the system using various FOP reports in Oracle Revenue Management and Billing.
<i>Oracle Revenue Management and Billing Chatbot Configuration Guide</i>	Explains how to integrate Oracle Digital Assistant (ODA) with Oracle Revenue Management and Billing.
<i>Oracle Revenue Management and Billing Chatbot User Guide</i>	Explains how to use the menu based Chatbot introduced in Oracle Revenue Management and Billing.
<i>Oracle Revenue Management and Billing ML Integration Guide</i>	Explains how to integrate Machine Learning (ML) with Oracle Revenue Management and Billing for anomaly detection.

You can access the Oracle Revenue Management and Billing Version 7.X.X.X.X Documentation Library using the following URL:

[https://docs.oracle.com/cd/F96339\\_01/homepage.htm](https://docs.oracle.com/cd/F96339_01/homepage.htm)

OR

<https://docs.oracle.com/en/industries/financial-services/revenue-management-billing/index.html>

# Documentation Updates

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The following are the documentation updates for Release 8.1.1:

- The **SFTP Authentication Guide** is obsolete and no longer supported. Therefore, we have not added this document to the Release 8.1.1 Documentation Library. Instead, we recommend you refer a new document named **SFTP Authentication and Access Permissions Guide** which is available in the Release 8.1.1 Documentation Library. This document will help you to understand how to generate the public and private keys for SFTP user authentication. It explains how to establish authentication with the SFTP hosts in the ORMB cloud service using the public and private keys.

It also explains how to access the SFTP server using WinSCP, how to create the directories and files on the SFTP server, and how to set the read, write, and execute permissions for a file or folder on the SFTP server. In addition, it explains how to upload the files and folders to the SFTP server and download the files and folders from the SFTP server.

- The **End User Provisioning Guide** is now renamed as **End-User Onboarding Using IDCS**. Similarly, the **Federated Identity Configuration Guide** is renamed as **Federated Identity Configuration Using IDCS**.
- Two new additional documents named **Federated Identity Configuration Using IAM** and **End-User Onboarding Using IAM** are introduced in this release.



## Supported Platforms and Browsers

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You can access Oracle Revenue Management and Billing Cloud Service via a supported web browser. Oracle Revenue Management and Billing Cloud Service supports the following operating system and web browser combinations:

Operating System	Web Browser
Windows 10 (64-bit)	Chromium Edge v108+
	Mozilla Firefox ESR 102+
	Google Chrome Enterprise Version 108+

**Note:** Version numbers suffixed with "+" are the MINIMUM version supported. That version and all future 4<sup>th</sup> digit updates will be supported.

The recommended monitor resolution is 1920x1080 or higher with the browser zoom level set to 100%. The application can be used with lower resolution monitors and/or at a greater than 100% browser zoom level, but users may need to use horizontal scrolling on some pages.

## High-Level Roles and Responsibilities

This section outlines the high-level roles and responsibilities involved in the deployment, configuration, and maintenance of Oracle Revenue Management and Billing Cloud Service. The **Owner** column in the below tables indicate the party responsible for each role and responsibility.

### Hardware, Storage, Technology, and Application Software

Role and Responsibility	Owner (Oracle or Customer)
Provide, deploy, and monitor hardware and storage	Oracle
Provide, deploy, run, and monitor all required technology (for example, containers, operating systems, databases, clustering, monitoring, tracing)	Oracle
Provide, deploy, run, and monitor all ORMB base application software	Oracle

### Security

Role and Responsibility	Owner (Oracle or Customer)
Monitor cloud service infrastructure security	Oracle
Administer Oracle network security	Oracle
Administer customer network security	Customer
Configure and maintain cloud service users and access	Customer
Integrate with Oracle networks	Customer

### Database

Role and Responsibility	Owner (Oracle or Customer)
Database administration services	Oracle
Backup and restore	Oracle
Backup retention	Oracle
Data replication in case of disaster recovery (where applicable)	Oracle
Disaster recovery database fail-over	Oracle
Refresh the testing database from PROD (upon request and within prescribed limits)	Oracle
Information Lifecycle Management	Oracle

## Implementation, Configuration, and Extensions

Role and Responsibility	Owner (Oracle or Customer)
Plan and execute implementation project	Customer
Perform configuration of enterprise software features and functions	Customer
Execute functional, system, load, and performance testing of configuration and extensions	Customer
Ensure operational readiness	Customer
Schedule all gate review services	Customer

## Patching and Upgrading

Role and Responsibility	Owner (Oracle or Customer)
Patch and upgrade underlying infrastructure software	Oracle
Patch and upgrade base application software	Oracle
Decide the cloud service upgrade schedule (within prescribed limits)	Oracle
Trigger environment upgrades (Development, Testing, and Production)	Oracle
Perform regression testing of configuration and extensions after patching or upgrades	Customer

## Batch Processing

Role and Responsibility	Owner (Oracle or Customer)
Monitor underlying batch infrastructure	Oracle
Provide infrastructure logs for batch incidents	Oracle
Resolve infrastructure batch issues	Oracle
Determine batch schedule	Customer
Monitor batch job completion	Oracle
Perform first level investigation of batch issues	Customer
Provide customer logs of batch incidents	Oracle
Resolve functional batch issues	Oracle
Restart batch job	Customer
Resolve data issues	Customer

## Support

<b>Role and Responsibility</b>	<b>Owner (Oracle or Customer)</b>
Triage, analyze, and resolve issues with the cloud service	Oracle
Triage, analyze, and resolve issues with configuration and extensions	Customer
Raise service requests via My Oracle Support and provide all requested information	Customer

## Known Issues

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For feature-specific known issues, see the **Known Issues** section in the *Oracle Revenue Management and Billing Version 7.0.0.0.0 Release Notes*.