

Oracle Financial Services Performance Analytics

Release Notes

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Financial Services

OFS Performance Analytics Pack Release Notes

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Document Control

Version Number	Revision Date	Change Log
1.0	10-Feb-2021	Created and released the Oracle Financial Services Performance Analytics Applications Pack v8.1.1.0.0 Release Notes document.

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1 About this Guide

This section provides supporting information for Oracle Financial Service Performance Analytics Applications Pack (OFS PA Applications Pack) Release Notes.

Topics:

- [Purpose of this Document](#)
- [Intended Audience](#)
- [Access to Oracle Support](#)
- [Related Information Sources](#)

1.1 Purpose of this Document

This document contains release information of OFS PA Applications Pack, Release 8.1.1.0.0.

1.2 Intended Audience

This document is intended for users of OFS PA Applications Pack, Release 8.1.1.0.0.

1.3 Access to Oracle Support

Oracle customers 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.

1.4 Related Information Sources

We strive to keep this and all other related documents updated regularly; visit the [OHC Documentation Library](#) to download the latest version available there. The list of related documents is provided here.

OHC Documentation Library for the OFS PA Applications Pack Release 8.1.1.0.0:

Installation Guide:

- [OFS Performance Analytics Pack Installation and Configuration Guide Release 8.1.1.0.0](#)

OFS PA Pack User Guides:

- [OFS Institutional Performance Analytics User Guide Release 8.1.1.0.0](#)
- [OFS Retail Performance Analytics User Guide Release 8.1.1.0.0](#)
- [OFS Enterprise Financial Performance Analytics User Guide Release 8.1.1.0.0](#)

OFS PA Pack Security Guides:

- [OFS Institutional Performance Analytics Security Guide Release 8.1.0.0.0](#)

- [OFS Retail Performance Analytics Security Guide Release 8.1.0.0.0](#)
- [OFS Enterprise Financial Performance Analytics Security Guide Release 8.1.0.0.0](#)

OFS PA Pack Cloning Reference Guides:

- [OFS Institutional Performance Analytics Cloning Reference Guide Release 8.1.0.0.0](#)
- [OFS Retail Performance Analytics Cloning Reference Guide Release 8.1.0.0.0](#)
- [OFS Enterprise Financial Performance Analytics Cloning Reference Guide Release 8.1.0.0.0](#)

1.5 Additional Documents to Read

Oracle Financial Services Profitability Management Applications Pack is built on the Oracle Financial Services Advanced Analytical Applications Infrastructure (OFS AAI). See the following OFS AAI documents as no separate documents are required at the pack or application level for Oracle Financial Services Profitability Management Applications Pack:

- [OFS Analytical Applications Infrastructure \(OFS AAAI\) Application Pack Installation and Configuration Guide Release 8.1.1.0.0](#)
- [OFS Analytical Applications Infrastructure Administration and Configuration Guide Release 8.1.x](#)
- [OFS Analytical Applications Infrastructure Cloning Reference Guide Release 8.1.x](#)
- [OFS Analytical Applications Infrastructure Security Guide Release 8.1.x](#)
- [OFS Analytical Applications Infrastructure User Guide Release 8.1.1.0.0](#)

You can access the common document from the OHC Documentation Library:

- [OFS Analytical Applications 8.1.1.0.0 Technology Matrix](#)

2 Introduction to OFS PA Applications Pack

Oracle Financial Services Performance Analytics Applications Pack includes the following applications:

- **Oracle Financial Services Analytical Applications Infrastructure:** In today's turbulent markets, financial institutions require a better understanding of their risk-return, while strengthening competitive advantage, and enhancing long-term customer value.

Oracle Financial Services Analytical Applications (OFSAA) enables financial institutions to measure and meet the risk-adjusted performance objectives, cultivate a risk management culture through transparency, lower the costs of compliance and regulation, and improve insight into customer behavior.

OFSAA uses industry-leading analytical methods, shared data models, and applications architecture to enable integrated risk management, performance management, customer insight, and compliance management. OFSAA actively incorporates risk into decision making, enables to achieve a consistent view of performance, promotes a transparent risk management culture, and provides pervasive intelligence.

OFSAA delivers a comprehensive, integrated suite of financial services analytical applications for both banking and insurance domains.

- **Oracle Financial Services Enterprise Financial Performance Analytics:** This application is based upon a dedicated reporting mart built on the Financial Services Data Model and displays Profitability results generated at the Management Ledger level by the Funds Transfer Pricing and Profitability Management applications. OFSEFPA leverages several components of OBIEE technology. It includes various aggregate Dashboards and Reports for the user to carry out Profitability Management based analytics at the level of Organization and Product.
- **Oracle Financial Services Institutional Performance Analytics:** Oracle Financial Services Institutional Performance Analytics (OFSIPA) is a complete end-to-end web-based Business Intelligence solution for Profitability and Business Performance Insight. It provides tools for data integration and includes customizable, pre-built dashboards and reports, a reporting data model, and user-friendly functional subject areas for ad-hoc reporting. It enables you to actively plan, manage, and track business performances, business analysis KPIs and customer 360-degree analysis and profitability, weaker and stronger business areas, efficiency in relationship management, marketing investments with pre-built reports, dashboards, and underlying data structures.
- **Oracle Financial Services Retail Performance Analytics:** This application focuses on the summary performance of the LOBs and overall profitability, Portfolio mix, LOB, Product-specific profitability reports analyzed against key dimensions like customer segments, product family, region, branch, risk scores and so on, Product holdings and Relationship depth across the LOBs, Customer Trends across performance drivers like Sales, Balances, Deposits, Product subscriptions (revenue services), Credit scores and delinquency bands, losses, and so on, Customer analysis and customer lifetime value, business analysis KPIs and customer 360-degree analysis. The efficiency of investments (like marketing, channel and so on) over time.

See the subsequent chapters to know more about this release.

- [Oracle Financial Services Enterprise Financial Performance Analytics](#)
- [Oracle Financial Services Institutional Performance Analytics](#)
- [Oracle Financial Services Retail Performance Analytics](#)

3 Oracle Financial Services Enterprise Financial Performance Analytics

This chapter describes the new features, bugs addressed, and known issues in this release of OFS Enterprise Financial Performance Analytics.

Topics:

- [New Features in this Release](#)
- [Bugs Fixed in this Release](#)
- [Known Issues and Limitations in this Release](#)

3.1 New Features in this Release

There are no new features in this release of the Oracle Financial Services Enterprise Financial Performance Analytics Application.

3.2 Bugs Fixed in this Release

There no bugs fixed in this release of the Oracle Financial Services Enterprise Financial Performance Analytics Application.

3.3 Known Issues and Limitations in this Release

There are no known issues or limitations in this release of the OFS Enterprise Financial Performance Analytics Application.

4 Oracle Financial Services Institutional Performance Analytics

This chapter describes the new features, bugs addressed, and known issues in this release of OFS Institutional Performance Analytics.

Topics:

- [New Features in this Release](#)
- [Bugs Fixed in this Release](#)
- [Known Issues and Limitations in this Release](#)

4.1 New Features in this Release

Following are the new features/changes incorporated in this release of the Oracle Financial Services Institutional Performance Analytics Application.

- **Rewritten Reports**

Some reports are re-written with design changes to enhance the performance and improve the rendering time. The rewritten reports from 80503 release have been forward ported to this release.

- **Integration of PFT and FTP Results Area with PA Applications**

This is achieved using a new table FSI_D_INST_SUMMARY from where PA will source data for the target tables namely FCT_PFT_ACCOUNT_SUMMARY, FCT_FTP_ACCOUNT_SUMMARY, and FCT_PFT_CUSTOMER_SUMMARY.

- **API Enhancements**

The Web Services API is enhanced with some functional changes to accommodate the Default Segment Type and filtering on Segment Types.

- **CX Integration**

Provided with Customer Level, Account Level and Product Level Metrics from PA to CI/RCA-CXU.

- **Data Visibility Role changes**

Data visibility restriction is removed at RPD level for performance enhancement. This would be further brought back into future releases with improved design.

- **Pack Separation**

IPA, RPA, and EFPA applications are separated from the erstwhile Profitability Applications Pack and made into OFS Performance Analytics Pack.

- **Tech Stack-need to have info**

Application(s) have been qualified against the OFSAA Tech Matrix 812 with the following exceptions at the time of release:

- Forecasting and Correlation R-Models using ORD are not verified on OEL 8.

Contact [My Oracle Support \(MOS\)](#) if you need latest and more details on these exceptions.

4.2 Bugs Fixed in this Release

There are no fixed bugs in this release of Oracle Financial Services Institutional Performance Analytics Application.

4.3 Known Issues and Limitations in this Release

The known issues and limitations in the OFS Institutional Performance Analytics Application Release 8.1.1.0.0 are as follows:

- The Line of Business Analysis: New Business Analysis is not displaying any data in the report.
- The scenarios saved in the What-If OFSAA screen are not being saved in the target table in a standalone PA setup.

5 Oracle Financial Services Retail Performance Analytics

This chapter describes the new features, bugs addressed, and known issues in this release of OFS Retail Performance Analytics.

Topics:

- [New Features](#)
- [Bugs Fixed in this Release](#)
- [Known Issues and Limitations](#)

5.1 New Features in this Release

Following are the new features/changes incorporated in this release of the OFS Retail Performance Analytics Application.

- **Rewritten Reports**

Some reports are re-written with design changes to enhance the performance and improve the rendering time. The rewritten reports from 80503 release have been forward ported to this release.

- **Integration of PFT and FTP Results Area with PA Applications**

This is achieved using a new table FSI_D_INST_SUMMARY from where PA will source data for the target tables namely FCT_PFT_ACCOUNT_SUMMARY, FCT_FTP_ACCOUNT_SUMMARY, and FCT_PFT_CUSTOMER_SUMMARY.

- **API Enhancements**

The Web Services API is enhanced with some functional changes to accommodate the Default Segment Type and filtering on Segment Types.

- **CX Integration**

Provided with Customer Level, Account Level and Product Level Metrics from PA to CI/RCA-CXU.

- **Data Visibility Role changes**

Data visibility restriction is removed at RPD level for performance enhancement. This would be further brought back into future releases with improved design.

- **Pack Separation**

IPA, RPA, and EFPA applications are separated from the erstwhile Profitability Applications Pack and made into OFS Performance Analytics Pack.

- **Tech Stack-need to have info**

Application(s) have been qualified against the OFSAA Tech Matrix 812 with the following exceptions at the time of release:

- Forecasting and Correlation R-Models using ORD are not verified on OEL 8.

Contact [My Oracle Support \(MOS\)](#) if you need latest and more details on these exceptions.

5.2 Bugs Fixed in this Release

There are no fixed bugs in this release of OFS Retail Performance Analytics.

5.3 Known Issues and Limitations in this Release

The known issues and limitations in the OFS Retail Performance Analytics Application Release 8.1.1.0.0 are as follows:

- For Segmentation on Profitability and Risk:
 - In the UI, there are no records displayed and most of the hierarchies are blank and do not have options
 - The band type CUST_PREDICT_LTV in dim bands is not available for Profitability.
 - The band types CUST_PREDICT_LTV and ACCT_LOAN_TO_VAL are not available for Risk.
- The Line of Business Analysis - New Business Analysis is not displaying any data in the report.
- The scenarios saved in the What-If OFSAA screen are not being saved in the target table in a standalone PA setup.

6 Oracle Financial Services Analytical Applications Infrastructure

See the [Oracle Financial Services Advanced Analytical Applications Infrastructure Application Pack Readme file](#) for the details on the New Features, List of Bugs Fixed, and Known Issues and Limitations.

7 **Hardware and Software Tech Stack Details**

The hardware and software combinations required for OFS AAI 8.1.1.0.0 are available at [OFS Analytical Applications Technology Matrix](#).

8 Licensing Information

For details on the third party software tool used, see the [OFSAA Licensing Information User Manual Release 8.1.1.0.0](#).

OFSAA Support

Raise a Service Request (SR) in [My Oracle Support \(MOS\)](#) for queries related to OFSAA applications.

Send Us Your Comments

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- Is the information clearly presented?
- Do you need more information? If so, where?
- Are the examples correct? Do you need more examples?
- What features did you like most about this manual?

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