

# **Oracle Financial Services Revenue Management and Billing**

**OR**

## **Oracle Insurance Revenue Management and Billing**

Version 8.1.0.0.0

### **Release Overview Guide**

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Oracle Financial Services Revenue Management and Billing/Oracle Insurance Revenue Management and Billing Version 8.1.0.0.0 Release Overview Guide

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

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# Preface

## About this Document

This document describes the new features, enhancements, user interface level changes, and database level changes made in this release. The new features and enhancements are classified under three categories – Generic (which is intended for both domains), Financial Services, and Insurance. It lists and describes enhancements made in the framework. It also encloses the ORMB and OUAF deprecation notices and enables you to access the product documentation.

## 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   | Prerequisites                                 | Lists some prerequisites for the existing customers while upgrading to the ORMB Version 8.1.0.0.0.                                        |
| Section 2   | New Features (Generic)                        | Lists and describes the new features introduced in this release that can be used in both financial services and health insurance domains. |
| Section 3   | New Features (Specific to Financial Services) | Lists and describes the new features introduced in this release that can be used in the financial services domain.                        |
| Section 4   | New Features (Specific to Insurance)          | Lists and describes the new features introduced in this release which can be used in the health insurance domain.                         |
| Section 5   | Enhancements (Generic)                        | Lists and describes the enhancements made to the features that are used in both financial services and health insurance domains.          |
| Section 6   | Enhancements (Specific to Financial Services) | Lists and describes the enhancements made to the features that are used in the financial services domain.                                 |

| Section No. | Section Name                                                     | Description                                                                                                                      |
|-------------|------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|
| Section 7   | Enhancements (Specific to Insurance)                             | Lists and describes the enhancements made to the features that are used in the health insurance domain.                          |
| Section 8   | User Interface (UI) Level Changes                                | Lists the changes made to the existing screens in ORMB.                                                                          |
| Section 9   | Database Level Changes                                           | States the documents that you can refer for different database level changes.                                                    |
| Section 10  | Technical Recommendations                                        | Provides recommendations to improve the overall batch performance on the Windows and Linux platforms.                            |
| Section 11  | Oracle Utilities Application Framework Version 25.4 Enhancements | Lists and describes the new features and enhancements made in OUAF Version 25.4.                                                 |
| Section 12  | Deprecation Notices for OUAF Version 25.4                        | Lists the features and system data that are deprecated in this release or planned for deprecation in the future release of OUAF. |
| Section 13  | Deprecation Notices for ORMB Version 8.1.0.0.0                   | Lists the features and system data that are deprecated in this release or planned for deprecation in the future release of ORMB. |
| Section 14  | Product Documentation                                            | Provides information on how to access the ORMB documentation.                                                                    |
| Section 15  | Technical Support                                                | Provides instructions on how to avail the technical support for ORMB.                                                            |

## 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. |

## Related Documents

You can see the following documents for more information:

| Document Name                                                                | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Oracle Revenue Management and Billing Version 8.1.0.0.0 Release Notes</i> | Lists the new features and enhancements made in this release. It contains high-level information about the supported platforms, framework upgrade, supported upgrades, unsupported integrations, and media pack downloads. It also lists the discontinued features, bug fixes, and known issues in this release.                                                                                                                                                                                                                                                                                                                                                                 |
| <i>Oracle Revenue Management and Billing Licensing Guide</i>                 | <p>Lists different features which you can use when you acquire a license for the following products:</p> <ul style="list-style-type: none"><li>• Oracle Financial Services Revenue Management and Billing</li><li>• Oracle Insurance Revenue Management and Billing</li></ul> <p>It also provides the licensing information about the third-party JARs and components which are included in the above-mentioned products.</p>                                                                                                                                                                                                                                                    |
| <i>Oracle Revenue Management and Billing Quick Installation Guide</i>        | Provides information about the media packs which are available for the current release. It contains information about the supported platforms, space requirements, and release-specific documentation library. In addition, it contains high-level information on how to install ORMB and selected additional software.                                                                                                                                                                                                                                                                                                                                                          |
| <i>Oracle Revenue Management and Billing Installation Guide</i>              | <p>Provides an overview about the application architecture. It contains detailed information about the software and hardware requirements, supported platforms, application server and database space requirements, and application server pre-requisites for supported platforms. It explains the installation and configuration menu options which are available during installation and advanced menu options which are available post installation. It also explains how to install OUAF, OUAF rollup packs, ORMB, and ORMB patches or rollup packs.</p> <p>It contains appendices which lists ORMB rollup packs and notices about third-party JAR and other components.</p> |

| Document Name                                                               | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
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| <i>Oracle Revenue Management and Billing Database Administrator's Guide</i> | <p>Provides information about the supported database platforms and explains how to install database with or without demo data. It contains the standards and conventions that should be followed while working with ORMB database. In addition, it lists various configurations and implementation guidelines with respect to tablespace, encryption, storage, compression, indexes, initialization parameters, listener, table partitioning, performance monitoring, memory resource management, optimizer statistics and segment advisors, etc.</p> <p>It contains various appendices which lists the new objects added in ORMB, application services configured for default user groups, new objects added in OUAF, information about OUAF system tables and ORMB rollup packs, notices about third-party JAR and other components.</p> |
| <i>Oracle Revenue Management and Billing Security Guide</i>                 | <p>Highlights what's new in security! Describes all the security features available in ORMB for authentication, authorization, user access, database access, LDAP and SSO integration, audit, encryption, web services, and JNDI access. It also describes how to provide support for data masking, Oracle cloud object storage, groovy, HTTP proxy, keystore, truststore, whitelist, federated architecture, and object erasure. In addition, it explains how to garble the customer information.</p>                                                                                                                                                                                                                                                                                                                                     |
| <i>Oracle Revenue Management and Billing Server Administration Guide</i>    | <p>Provides detailed information about the product architecture, native support, directory structures, environment variables, logs, etc. It explains various concepts related to the batch server and lists and describes the scripts required for installing and configuring ORMB. It explains how to monitor the system and configure Web browser, Web application server, business application server, inbound web services, and batch server. It explains how to provide Oracle Cloud Support and how to integrate and monitor Oracle Scheduler.</p> <p>It contains various appendices which lists and describes the parameters available in the ENVIRON.INI, Web.xml, spl.properties, hibernate.properties, submitbatch.properties, threadpoolworker, coherence-cache.config.xml, and tangosol-coherence-override.xml files.</p>      |

| 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 on 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>  | <p>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.</p> <p>The features listed and described in this document can be used in both financial services and health insurance domains.</p> |
| <i>Oracle Revenue Management and Billing Administrative Guide</i>    | <p>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.</p> <p>The information available in this document can be used in both financial services and health insurance domains.</p>                                                                                                                                                                                                                                                        |

| Document Name                                                     | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
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| <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 Upgrade Path Guide</i>   | <p>Explains the path and pre-requisites for upgrading Oracle Revenue Management and Billing from one version to another.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

| Document Name                                                                                            | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|----------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Oracle Revenue Management and Billing Upgrade Guide</i>                                               | <p>Explains how to upgrade the ORMB application server and database from one version to another. It also explains how to migrate the ORMB data from one version to another and describes the additional tasks that you need to perform after upgrading from one version to another.</p> <p>It includes various appendices that contain information about new tables introduced in the current release, existing tables which are modified in the current release, dropped algorithms and algorithm types, dropped characteristic types, dropped algorithm parameters, dropped option types in feature configurations, ORMB rollup packs, and SQL statements used for data migration.</p> |
| <i>Oracle Revenue Management and Billing Direct Database Upgrade Guide</i>                               | Explains how to directly upgrade the ORMB database from 2.5.0.1.0 or any later version to the current release. It also highlights any known issues during direct database upgrade and how to handle these issues in the database.                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| <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>                                                                                                                                                                                                                                    |
| <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 Information Lifecycle Management (ILM) Implementation Guide</i> | Provides an overview of the Information Lifecycle Management (ILM) feature. It describes how to implement ILM for the Transaction Feed Management (TFM) and Billing modules. It also provides detailed information about the ILM batches and their parameters.                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <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.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |

## **Access to Oracle Support**

Oracle customer access to and use of Oracle support services will be pursuant to the terms and conditions specified in their Oracle order for the applicable services.

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## Prerequisites

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If a customer is already using the Transaction Feed Management feature and wants to upgrade to Oracle Revenue Management and Billing Version 8.1.0.0.0, then the customer needs to ensure the following (before upgrading):

- All bills generated in the system are in the **Complete** status. In other words, there should not be any bills in the **Pending** status. If there are any bills in the **Pending** status or if any billable charge (generated through TFM) is not yet billed, disaggregation and cancellation of transactions which are uploaded using any previous version will not happen successfully.
- Transactions which are uploaded using any previous version must not be in the **Initial Product Determined (INPD)** status. They can be in the **Uploaded (UPLD)**, **Invalid (INVL)**, **Error (EROR)**, **Completed (COMP)**, or **Cancelled (CNCL)** status.
- Equal to (=) or tilde (~) symbol is not used in any existing price item parameter code and value. Otherwise, erroneous results might occur.

## New Features (Generic)

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This section describes the following new features added in this release that can be used in both financial services and health insurance domains:

- [Late Payment Charge \(LPC\)](#)
- [Enabling Machine Learning Features](#)

### Late Payment Charge (LPC)

Until now, you were able to setup late payment charge configuration at the customer class level which was applicable to all the accounts that belong to the respective customer class. Now, the system provides the ability to setup late payment charge configuration even at the account level. The following new characteristic types are introduced in this release:

- **C1-LPCGD** – Used when you want to define LPC grace days at the account level. If you define this characteristic type for an account, the system will consider the given LPC grace days while calculating the late payment charge date for the bills of the respective account. Note that this characteristic type is considered for late payment charge date calculation only when the **Late Payment Charge** option is selected for the customer class.
- **C1-LPCEX** – Used when you want to exclude the account for LPC calculation. The valid value is **Y**. If you set this characteristic type for an account to **Y**, the system will not calculate late payment charge for any of its bill segments which are eligible LPC calculation.

Note that if the **C1-LPCGD** characteristic type is not defined for an account, the system will consider the LPC grace days of the respective customer class when the customer class is eligible for late payment charge. The **POSTPROC** batch is enhanced to consider the account level LPC grace days, if configured, while calculating the late payment charge date for the bill. The system will then consider the bill for LPC calculation whenever the **LATEPYMT** batch is executed immediately after the late payment charge date. Once the late payment charge is calculated for a bill, the late payment charge details are removed from the respective bill.

Also, until now, the system used to bill cumulative late payment charge for a service to an account when it is unpaid. Now, the system enables you to configure whether cumulative or non-cumulative late payment charge should be calculated for a service. A new parameter named **Non-Cumulative LPC** is added in the **BILPC-TOTAL** algorithm type. It enables the system to determine whether non-cumulative late payment charge should be calculated for a service. The value valid is **Y**. If you set the **Non-Cumulative LPC** parameter to **Y**, the system will exclude the late fees charged to customer in the previous bill during the subsequent bill's LPC calculations if it is unpaid. This is done when the **LATEPYMT** batch is executed.

## Enabling Machine Learning Features

Until now, you were able to detect anomalies in bills using the machine learning models. Now, in all, Oracle Revenue Management and Billing offers the following machine learning features:

- Billing Anomaly Detection
- Deal Win Probability
- Transaction Anomaly Detection

If you want to use an ML feature, you need to enable the feature using the respective option type of the **C1-AIMLFC** feature configuration:

- **Billing Anomaly Detection Feature Opt-In** – Used to indicate whether you to enable the billing anomaly detection feature in the system. The valid values are:
  - o **BK** – Used when you want to enable the billing anomaly detection feature for the financial services domain.
  - o **ASO** – Used when you want to enable the billing anomaly detection feature for the self-funded line of health insurance business.
- **Deal Win Probability Feature Opt-In** - Used to indicate whether you to enable the deal win probability feature in the system. The valid values are Y and N.
- **Transaction Anomaly Detection Feature Opt-In** - Used to indicate whether you to enable the transaction anomaly detection feature in the system. The valid values are Y and N.

Once the feature is enabled in the system, you need to indicate the divisions for which the system should prepare and analyze the data. The system will then accordingly create models for predication. A new master configuration is created using the **C1-AIMLMST** business object. It allows you to enable or disable the following features at the division level:

- Billing Anomaly Detection
- Deal Win Probability
- Transaction Anomaly Detection

## New Features (Specific to Financial Services)

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This section describes the following new features added in this release that can be used in the financial services domain:

- [Enabling SEPA Pricing Validation Norms for Deals](#)
- [Customer 360 UI/UX Redesign](#)
- [Price Assignment UI/UX Redesign](#)
- [Deal Win Probability Using Machine Learning \(ML\)](#)
- [Deal Inactivation](#)
- [Override Price Assignment Through Bill Correction](#)
- [Support Recurring Billable Charges Through Bill Correction](#)
- [Address Manual Changes Through Bill Correction](#)

### Enabling SEPA Pricing Validation Norms for Deals

Oracle Revenue Management and Billing enables you to validate pricing offered for associated price items as per the Single Euro Payments Area (SEPA) norms in a deal. To implement this business requirement, the following changes are made to the system:

- Two new fields named **Relationship Type** and **Relation Operator** are introduced in the **Associate Price Items for Relationship Based Pricing** screen.
- A new relationship type named **Sepa Pricing Validation** is introduced in the **PRICEITEM\_REL\_TYPE\_FLG** lookup field.
- A new option type named **Associate Price Item Relationship Type For Lesser Pricing** is introduced in the **C1\_PRICING** feature configuration. It enables you to indicate the relationship type that you can use while associating two or more price items whose pricing should be validated as the SEPA norms in a deal. You must set this option type to **SEPA**.

While associating two or more price items that meet SEPA norms, you need to specify the following in the **Associate Price Items for Relationship Based Pricing** screen:

- Set the relationship type of parent and child price items to **SEPA**.
- Set the relation operator to either of the following:
  - o **<** - Used when you want to the parent price item pricing offered in a deal should be less than the associated price items' pricing.
  - o **<=** - Used when you want to the parent price item pricing offered in a deal should be less than or equal to the associated price items' pricing.
  - o **==** - Used when you want to the parent price item pricing offered in a deal should be equal to the associated price items' pricing.

- o > - Used when you want to the parent price item pricing offered in a deal should be greater than the associated price items' pricing.
- o >= - Used when you want to the parent price item pricing offered in a deal should be greater than or equal to the associated price items' pricing.

Once the price items are associated using the above specifications and the **Associate Price Item Relationship Type For Lesser Pricing** option type is defined in the **C1\_PRICING** feature configuration, the system validates the associated price items' pricing in a deal based on the given relation operator. If the SEPA pricing criteria is not met for associated price items, the system will not allow you to save the pricing changes. Note that the associated price items' pricing is validated as per the SEPA norms only when the following pricing attributes are same – **Price Assignment Type, Rate Schedule, Ignore Transaction, Do not Aggregate Switch, Aggregation Schedule, and Transaction Rating Criteria**.

## Customer 360 UI/UX Redesign

In this release, Oracle Revenue Management and Billing offers a 360° dashboard that provides comprehensive, real-time, and interactive view of the customer's profile, financials, product and pricing, billing and payments, disputes, and deals. This dashboard built on Oracle's Redwood design principles organizes the functional data using scoreboards at the top of the screen. You can access the required information with minimal clicks, thereby enhancing the user experience and screen efficiency.

At present, we have offered this enhanced 360° dashboard to view the information at the customer level and not at the account level. For account level 360° information, you can continue to use the old **Customer 360° Information** screen until we design the new enhanced **Account 360° Dashboard** in the upcoming release. You can access the new **Customer 360° Dashboard** from the **Customer 360° View** screen.

The **Customer 360° Dashboard** displays key customer information at the top of the screen. The display order in which the key customer attributes are shown is configurable with the option to view more attributes in the drawer (i.e., side panel). The **Quick Links** in the extreme right-corner enables you to launch the entity-specific context menu and navigate to other screens in the application. The screen is functionally split into different scoreboards. Each scoreboard provides a quick overview of key metrics (KPI), such as total usage accounts in the customer hierarchy, total outstanding amount of the customer, number of effective prices, total overdue amount, total dispute amount, and number of active deals, apart from the detailed information. The different scoreboards in **Customer 360° Dashboard** are:

- **Customer Hierarchy** – Displays the legal hierarchy of the customer. It contains the following tabs:
  - **Default Hierarchy** – Indicates the immediate parent customer (if any), customer, its accounts, child persons, child person's accounts, grandchild persons, and grandchild person's accounts in the customer hierarchy. The system displays the hierarchy icon corresponding to the persons that indicates whether the person is an independent person, parent person, person at the middle layer, or child person in the hierarchy. It also displays the division to which the person or account belongs. The system indicates whether any agreed pricing exists for the person or account. If so, the system indicates the number of agreed pricing available for the respective person or account. Similarly, the system indicates whether any price list is assigned to the person or account. If so, the system indicates the number of price list assignments available for the respective person or account. A hyperlink appears on the information strings in the **Agreed Pricing** and **Price List** columns. If you click the agreed pricing link, you can view the details of all the agreed price item pricing in the **Agreed Pricing Information** screen.  
  
Similarly, if you click the price list assignment link, you can view the list of price list assignments in the side panel.
  - **Billing Hierarchy** – Displays all the effective invoice constructs where the customer's invoice accounts are included. It also lists the usage accounts linked to the respective invoice construct. Note that these linked usage accounts may belong to the customer or any other customer in the system. Additionally, the usage accounts of the customer which are not yet included to any invoice construct are listed as the unassigned usage accounts.

- o **Settlement Hierarchy** - Displays all the effective settlement constructs where the customer's settlement accounts are included. It also lists the usage and invoice accounts linked to the respective settlement construct. Note that these linked usage and invoice accounts may belong to the customer or any other customer in the system.
  - o **Statement Hierarchy** - Lists the statement constructs in which any of its account or contract from the hierarchy is included.
- **Financials** – Provides insights into customer's financial performance. It contains the following three panels:
  - o **Revenue Trend** – Displays the amount billed to the customer for various services over past 13 months. You can view the data in both tabular and graphical formats. The total revenue of the customer is shown as the lifetime value.
  - o **Product Usage Trend** – Displays the number of services availed in past 13 months. You can view the data in both tabular and graphical formats.
  - o **Product Revenue** – Displays the revenue generated from each service offered to the customer. You can view the data in both tabular and graphical formats. You can opt to sort the data in order of top (descending) or least (ascending) performance. You can view the data at the price item, hierarchy entity, or parent hierarchy entity level.
- **Product and Pricing** – Provides information about the price items and price lists assigned to the customer. It contains the following three panels:
  - o **Effective Price Assignments** – Lists the effective pricing of the customer. It contains the following tabs:
    - **Customer** - Lists all the effective pricing of the customer in the tabular or hierarchy format.
    - **Account Agreed Pricing** – Lists all the effective account agreed pricing from the customer hierarchy in the tabular format.
  - o **Price List Assignment Information** – Lists the price lists which are assigned to the customer. It contains the following tabs:
    - **Customer View** – Lists all the price lists which are directly or indirectly assigned to the customer. On clicking the hyperlink, you can view the pricing details of the price list in the **Price List Pricing Information** screen.
    - **Account View** - Lists all the price lists which are directly assigned to the accounts in the customer hierarchy. On clicking the hyperlink, you can view the pricing details of the price list in the **Price List Pricing Information** screen.
  - o **Product Enrolled** - Lists the products which are assigned to the customer.

- **Billing & Payments** – Displays the billed vs settled amounts of the customer. It contains the following three panels:
  - o **Bills** – Indicates the number of bills created for the customer and the total billed amount in the given period. You can change the period using the given filters. In the tabular and graphical formats, you can view the number of bills under each category – Completed Bills, Bills in Review, Ready For Completion, Anomaly Bills, Bills in Error. You can also click the category to view the details of all the bills under the respective category.
  - o **Bills Vs Payments** – Displays the total billed amount and payments received against those bills for last 6 months in the tabular and graphical formats.
  - o **Payments** – Enables you to view all the payments of the customer for the given period under each category – draft, allocated, partially allocated, unallocated. On clicking the **More Details** link, you can view the details of the payments in the respective category.
  - o **Outstanding Dues By Aging Bucket** – Displays the overdue bills of the customer in different aging buckets using the graphical format. On clicking the **More Details** link, you can view the details of all the overdue bills.
- **Disputes & Adjustments** – Displays the dispute, hold, and adjustment details of a customer. It contains the following three panels:
  - o **Dispute Requests** – Classifies all the dispute requests of the customer under two status categories – **In Progress** and **Processed**. Each status category is associated with a set of underlying lifecycle statuses. For example, **In Progress** will show all the dispute requests in the **Draft** and **Approval In Progress** statuses. On clicking the **View All** link, you can view the details of all the dispute requests.
  - o **Hold Requests** - Classifies all the hold requests of the customer under two status categories – **Active** and **In Progress**. Each status category is associated with a set of underlying lifecycle statuses. For example, **Active** will show all the hold requests in the **Active**, **Release Approval In Progress**, and **Return Release Request to Submitter** statuses. On clicking the **View All** link, you can view the details of all the hold requests.
  - o **Adjustments** - Classifies all the refund, write off, and other adjustments of the customer under two status categories - **In Progress** and **Processed**. Each status category is associated with a set of underlying lifecycle statuses. On clicking the **View All** link, you can view the details of the refund, write off, and other adjustments.

**Note:** When you click the **View All** link, the system, by default, lists the records which belong to the respective status category in the side panel. However, you can filter the records based on the status in the side panel. Additionally, you can view the details of records with a status (if any) other than the ones included in the above-mentioned status categories.

- **Deals** – Displays the deal information of the customer. It contains the following panel:
  - o **Deals** - Classifies all the deals of the customer and its accounts under two status categories – **Active Deals** and **Pending Deals**. Each status category is associated with a set of underlying lifecycle statuses. For example, **Active Deals** will show all the deals in the **Closed**, **Fully Orchestrated**, **Partially Orchestrated**, and **Pending for Review** statuses. You can also add a deal for a customer or an account through this panel. On clicking the **View All** link, you can view the details of the deals.

**Note:** When you click the **View All** link, the system, by default, lists the deals which belong to the respective status category in the side panel. However, you can filter the deals based on the status in the side panel. Additionally, you can view the details of deals with a status (if any) other than the ones included in the above-mentioned status categories.

If all the accounts in the customer hierarchy have the same invoice currency, the system displays all the statistics in the respective invoice currency. But, if all the accounts in the customer hierarchy do not have the same invoice currency, the system does the currency conversion in the customer's division currency and displays the statistics in the division's base currency. However, if the customer does not belong to any division, the system does the currency conversion in the implementation currency (i.e., currency defined in the installation options) and displays the statistics in the implementation currency.

To address this currency conversion requirement for **Customer 360° Dashboard**, the following new columns are added to the **C1\_FT\_EXT** table - IMPL\_CURCY\_CD, IMPL\_CURRENCY\_AMT, IMPL\_CURRENCY\_EXCHRATE, IMPL\_CURRENCY\_EXCHRATE\_ID, ACCT\_DIV\_CURCY\_CD, ACCT\_DIV\_CURCY\_AMT, ACCT\_DIV\_EXCHRATE, ACCT\_DIV\_CUR\_EXCHRATE\_ID, PER\_DIV\_CURCY\_CD, PER\_DIV\_CURCY\_AMT, PER\_DIV\_EXCHRATE, PER\_DIV\_CUR\_EXCHRATE\_ID.

A new batch named **C1-FTUPD** is introduced in this release. It is a one-time upgrade batch that you need to execute before using the new Customer 360° dashboard. It will update the data in the newly introduced columns for the required financial transactions. The system will then accordingly do the currency conversion and display the statistics in the dashboard. However, before executing this batch, you need to attach an algorithm created using the **C1-CREFTEXT** algorithm type to the **Post FT Creation** system event of all the customer classes.

## Price Assignment UI/UX Redesign

In this release, Oracle Revenue Management and Billing offers a new simplified price assignment screen while assigning a price item to a person, account, or a price list. This screen built on Oracle's Redwood design principles provides a single-step pricing model with two modes – **Basic** and **Advanced**. It facilitates you with the following:

- Basic view with a pricing matrix that enables you to quickly define a flat, step, or threshold pricing for the price item.
- Advanced view that provides ability to define additional tiers for step and threshold pricing, eligibility criteria, etc.
- Advanced copy pricing option which enables you to either copy the entire pricing for a new price item or create a new pricing for the same price item using an existing pricing.

- Preview option which enables you to view the entire pricing details in a single screen.
- Separate screen or a delineated section to define tiering parameters if they are different from the pricing parameters. These tiering parameters are then applicable to all the step and threshold pricing tiers.
- Define complex pricing model when the rate schedule includes both flat and step or threshold rate components in both basic and advanced modes.
- Define cross pricing model when the rate schedule includes both step and threshold rate components in the advanced mode.
- Clearly distinguish mandatory fields using the visual cues (i.e., asterisk symbol).
- Minimal steps, navigation, and clicks for a seamless user experience and improved efficiency.

Until now, you were able to assign a price item to a person, account, or a price list using the **Assign** icon in the **Search Price Item or Price Item Pricing** zone from the respective screen. Now, a new button named **Add** is added in the **Effective Price Assignments for Person**, **Effective Price Assignments for Account**, and **Price List Price Items** zones of the **Pricing (Person)**, **Pricing (Account)**, and **Price List Price Item Pricing** screens, respectively. Once you select the price item for which you want to define the pricing, the  icon in the extreme right-corner of the screen is enabled. It enables you to select the following panels – **Parameter**, **TFM Information**, **Deal Information**, and **Additional Attributes**. Each panel enables you to define the respective information.

Once the rate schedule is selected, the **Basic-Advanced** toggle button is enabled. It enables you to switch between two modes – basic and advanced. The basic mode enables you to do the following for the respective pricing model:

- **Flat** – Define rates for the rate component.
- **Threshold** – Define rates for the required threshold tiering ranges of the rate component.
- **Step** – Define rates for the required step tiering ranges of the rate component.
- **Complex Pricing** – Define flat and threshold or step rates for the rate components.
- **Cross Pricing** – Define threshold and step rates for the rate components.

The advanced mode enables you to define additional information apart from the pricing information, such as additional tiers and eligibility criteria. You can store the pricing, if required, in the draft mode. However, on saving the pricing, the system sets the status of the pricing to **Active**. On overriding or editing a price assignment, the system now invokes the new price assignment screen. Note that while editing a price assignment, you cannot store the changes in the draft mode.

You can opt to configure approval workflow for the price assignment. If the approval workflow is configured for price assignment, the system will create the price assignment in the **Pending In Approval** status. The approver can approve or reject the price assignment based on the observations. If the approver approves a price assignment, the system changes the status of the price assignment to **Active**. However, if the approver rejects a price assignment, the system deletes the price assignment (in the **Pending In Approval** status) from the system.

The **Preview** button in the new price assignment screen allows you to view all the pricing details in a single screen before you finalize and save them. Note that, in the preview mode, the system only lists the tiers which are defined in the pricing. Until now, you were able to create a new pricing for the price item using an existing pricing using the **Copy Pricing** feature. Now, in addition, you can copy the entire pricing for a new price item using the **Copy Pricing** feature.

In addition, the new screen facilitates you to define two-dimensional pricing. Note that the **Basic-Advanced** toggle button is disabled whenever you select the **Two-Dimensional Pricing** option. This is because these modes are not applicable while defining a two-dimensional pricing. Note that the **Two-Dimensional Pricing** option is enabled when you select a rate schedule which has only STEP rate components.

## Deal Win Probability Using Machine Learning (ML)

In a highly competitive banking sector, securing deals is crucial for revenue growth and customer retention. Misaligned pricing proposals result in higher rejection rates, prolonged approval cycles, and lost revenue opportunities. To address these issues, ORMB offers machine learning techniques to analyze historical deal data and predict the probability of winning future deals. This will help the business in various ways:

- Streamline decision-making, helping relationship managers to propose competitive yet profitable pricing.
- Reduce the risk of deal rejection, accelerate approval cycles, and ensure pricing proposals align with both customer expectations and profitability goals.
- Minimize delays and renegotiations, providing a smoother and more satisfactory pricing experience.
- Improve the bank's overall revenue and profitability from successful deals.

The deal win probability feature is designed to read historical deal data to identify deal acceptance and rejection patterns, and thereby assign a score to predict the likelihood of successfully closing a new deal. The score can be considered as one of the many factors in decision-making. The ML predicted score can then be classified in different probability buckets, such as HIGH, MEDIUM, or LOW. You can configure the probability buckets by defining the ranges or thresholds most suitable to the business aligning with specific business goals, risk tolerance, and operational strategies. ORMB enables you to determine win probability at two levels for a deal – at individual price item level and at the overall deal level.

The price item level win probability enables the relationship manager to assess whether the proposed pricing, approver recommended pricing, or seasonal pricing would be customer receptive. This will thereby help the relationship manager to make more informed decisions and tailor their negotiations effectively. The deal level win probability enables the relationship manager to assess the likelihood of closing a specific deal successfully. This will thereby help the relationship manager to prioritize deals, focus resources on the most promising opportunities, and forecast future sales with greater accuracy.

To enable the deal win probability feature in ORMB, you need to do the following:

- Set the **Deal Win Probability Feature Opt-In** option type of the **C1-AIMLFC** feature configuration to **Y**.
- Enable the deal win probability feature for the required divisions through the master configuration created using the **C1-AIMLMST** business object.
- Set the various parameters, such as prediction thresholds, deal acceptance or rejection codes, machine learning parameters, etc. through the **C1-DWPFC** feature configuration.

A new batch named **C1-DWPPR** is introduced in this release. It reads the historical deal acceptance and rejection data of the divisions for which the deal win probability feature is enabled for the given date range. It then prepares the data and creates price item and deal models for predication. You need to update these models at regular intervals for more reliable data. Once the price item and deal models are ready, you can use them while creating a new deal for a customer or an account.

Once you override an original pricing, edit a proposed pricing, recommend a pricing, or create a seasonal pricing for a price item in a deal and simulate the respective deal, the system reads the prebuilt price item and deal models and predicts the win probability at the price item and deal levels. The probability is then categorized into the following buckets based on the prediction thresholds defined in the **C1-DWPFC** feature configuration – **High, Medium, Low**. Apart from the predicted score, the system also considers the average price floor and ceil limits of the price item to determine the probability bucket for each price item in the deal. The probability bucket then appears in the **Win Probability** column corresponding to each proposed and recommended pricing in the **Pricing and Commitments** screen. Similarly, the overall deal level probability bucket appears in the **Deal Financial Summary** section of the **Deal Information** screen.

Additionally, you may also come across the following buckets:

- **No Data** – Indicates that there is insufficient trained data to make a reliable prediction.
- **Invalid** – Indicates that an error occurred while simulating the deal.
- **Error** – Indicates that an error occurred while determining the win probability.

## Deal Inactivation

Until now, you were not able to inactivate the approved and finalized deals. Now, in addition, the **C1\_DLMTR** batch monitors the deals in the following statuses:

- Person Simulation Deferred
- Approved
- Finalized

Note that the deal in the **Approved** and/or **Finalized** statuses are considered for deal inactivation only when the newly introduced parameter named **Inactivate Approved Finalized Deals** is set while executing the **C1\_DLMTR** batch. This parameter is used to indicate whether the batch should consider the deals in the **Approved** and/or **Finalized** statuses for deal inactivation. The valid values for this parameter are:

- **B** – Used when you want the batch to consider the deals in the **Approved** and **Finalized** statuses.
- **A** – Used when you want the batch to consider the deals in the **Approved** status.

- **F** – Used when you want the batch to consider the deals in the **Finalized** status.

If you do not specify the value for this parameter, the batch will not consider the deals in the **Approved** and **Finalized** statuses for deal inactivation.

### **Implementation Guidelines**

If there are old deals in the **PDSM**, **APRD**, or **FNAL** status and are expired (i.e., (LAST\_UPDATE\_DTTM + Days to Inactivate Deal) < System Date), the system will not consider such deals while executing the **C1-DLMTR** batch. If you want to initiate the deal inactivation process for such expired deals, then you need to update the **Last Updated Date** (LAST\_UPDATE\_DTTM) column of such deals so that they can be considered during the **C1-DLMTR** batch execution. To update the **LAST\_UPDATE\_DTTM** column of old deals, you need to execute the following SQL query:

```
UPDATE C1_DEAL DEAL
```

```
SET DEAL.LAST_UPDATE_DTTM = (SELECT (SYSDATE + DLTYP.TODO_REMINDER_DAYS -
DLTYP.DAYS_TO_INACTIVATE) FROM C1_DEAL_TYPE DLTYP WHERE DEAL.DEAL_TYPE_CD =
DLTYP.DEAL_TYPE_CD)
```

```
WHERE DEAL.DEAL_ID IN (SELECT DEAL.DEAL_ID FROM C1_DEAL DEAL, C1_DEAL_TYPE DLTYP
WHERE DEAL.DEAL_TYPE_CD = DLTYP.DEAL_TYPE_CD AND DEAL.BO_STATUS_CD IN ('PDSM',
'APRD', 'FNAL') AND DLTYP.DAYS_TO_INACTIVATE IS NOT NULL AND DEAL.LAST_UPDATE_DTTM
IS NOT NULL AND (DEAL.LAST_UPDATE_DTTM + DLTYP.DAYS_TO_INACTIVATE) < SYSDATE
```

#### **Points to Note:**

Before executing the SQL query, we recommend you take backup of the **C1\_DEAL** table.

If the system date is overridden, you need to accordingly update the system date in the above SQL query before execution.

For example, assume the following:

- DAYS TO INACTIVATE DEAL = 180 Days
- TO DO REMINDER DAYS = 15 (First reminder To Do should be generated before deal inactivation)
- TO DO HIGH PRIORITY DAYS = 2 (Second reminder To Do should be generated before deal inactivation)

Now, if there is a deal in the **APRD** status with **LAST\_UPDATE\_DTTM** = 15-Jun-2023, the system will update the **LAST\_UPDATE\_DTTM** column of the deal to 23-Dec-2024 (i.e., SYSTEM DATE + REMINDER DAYS - DAYS TO INACTIVATE) on 06-Jun-2025 (i.e., system date) once the above SQL query is executed.

Once the **C1-DLMTR** batch is executed, the system will then sent first To Do reminder on 06-Jun-2025, second To Do reminder on 19-Jun-2025 and will finally inactivate the deal on 21-Jun-2025.

## Override Price Assignment Through Bill Correction

Until now, if some corrections were required in the bills due to pricing change, you were able to edit a price assignment through a bill correction request and create updated bills for the impacted customers and accounts either in the online or deferred mode. However, there might be scenarios where the pricing change is specific to a customer or an account which necessitate the ability to give an option to change pricing at the customer or account level. If you opt to change pricing at the customer or account level, the system will then accordingly derive the impacted bills of the respective customer or account. Once the impacted bills are canceled, you can override pricing of the customer or account and create a customer or account agreed pricing via the bill correction request. You can then create new bills using the agreed price assignment for the respective customer or account via the bill correction request.

To implement this business requirement, the following changes are made to the system:

- A new column named **Entity Level** is available in the **Correction Entities** section while defining or editing a bill correction request. This column displays the following values depending on the entity type:

| Entity Type      | Entity Level                         |
|------------------|--------------------------------------|
| Billable Charge  | Regular Charge                       |
|                  | Recurring Charge                     |
| Price Assignment | Customer Price List                  |
|                  | Parent Customer Price List           |
|                  | Parent Customer Agreed               |
|                  | Customer Inherited Price List        |
|                  | Parent Customer Inherited Price List |
|                  | Global Price List                    |
|                  | Default Price List                   |
|                  | Customer Agreed                      |
|                  | Account Price List                   |
|                  | Account Inherited Price List         |
|                  | Account Agreed                       |

- Until now, the **Action flag** list had just one option named **Edit** and which was selected by default. Now, in addition, the following options are added to the **Action Flag** list:
  - o **Cancel** – Used when you want to cancel a billable charge.
  - o **Override to Account** – Used when you want to change pricing of the account for which the primary bill is created. The system will then accordingly derive the impacted bills of the respective account based on the effective date. Once the impacted bills are canceled through a bill correction request, you can override pricing and create an account agreed pricing for the account. Once the new agreed price assignment is created, you can create new bills for the respective account via the bill correction request.
  - o **Override to Customer** – Used when you want to change pricing of the customer for whom the primary bill is created. The system will then accordingly derive the impacted bills of all the accounts in the customer hierarchy based on the effective date. Once the impacted bills are canceled through a bill correction request, you can override pricing and create a customer agreed pricing for the customer. Once the new agreed price assignment is created, you can create new bills for all the accounts in the customer hierarchy via the bill correction request.

The following table lists the options that are available when the respective entity is selected:

| Entity Type      | Entity Level                         | Actions                                                                                                                                   |
|------------------|--------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|
| Billable Charge  | Regular Charge                       | Cancel, Edit                                                                                                                              |
|                  | Recurring Charge                     | Cancel, Edit<br><b>Note:</b> The <b>Cancel</b> option is available only when the effective date is set to the billable charge start date. |
| Price Assignment | Customer Price List                  | Edit, Override to Customer, Override to Account                                                                                           |
|                  | Parent Customer Price List           | Edit, Override to Customer, Override to Account                                                                                           |
|                  | Parent Customer Agreed               | Edit, Override to Customer, Override to Account                                                                                           |
|                  | Customer Inherited Price List        | Edit, Override to Customer, Override to Account                                                                                           |
|                  | Parent Customer Inherited Price List | Edit, Override to Customer, Override to Account                                                                                           |
|                  | Global Price List                    | Edit, Override to Customer, Override to Account                                                                                           |
|                  | Default Price List                   | Edit, Override to Customer, Override to Account                                                                                           |
|                  | Customer Agreed                      | Edit, Override to Account                                                                                                                 |
|                  | Account Price List                   | Edit, Override to Account                                                                                                                 |

| Entity Type | Entity Level                 | Actions                   |
|-------------|------------------------------|---------------------------|
|             | Account Inherited Price List | Edit, Override to Account |
|             | Account Agreed               | Edit                      |

- The **C1-BCIMV** batch is enhanced to support the following action flag values:
  - o **Override to Account** – If the action flag is set to **Override to Account** corresponding to a price assignment in the bill correction request, this batch will derive the impacted bills of the respective account based on effective date.
  - o **Override to Customer** – If the action flag is set to **Override to Customer** corresponding to a price assignment in the bill correction request, this batch will derive the impacted bills of all the accounts in the customer hierarchy based on the effective date.

While setting the action flag to either **Override to Account** or **Override to Customer**, you can only set the effective date to a date which is later than or equal to the current price assignment start date. On clicking the **Verify Impact** button, the system will then derive the impacted bills of the respective customer or account based on effective date. On clicking the **Submit** button, the system will cancel all the impacted bills either in the online or deferred mode. You can then override the pricing of the customer or account and create a customer or account agreed pricing via the bill correction request. The new price assignment details are then available in the **New Entity ID** column of the **Correction Entities** section in the **Bill Correction** screen. You can then create new bills using the agreed price assignment for the respective customer or account via the bill correction request.

## Support Recurring Billable Charges Through Bill Correction

Until now, you were able to correct non-recurring billable charges of the bills and/or add non-recurring billable charges to the bills through the **Bill Correction** feature. Now, in addition, you can correct recurring billable charges of the bills and/or add recurring billable charges to the bills through the **Bill Correction** feature. In addition, you can also cancel a recurring or non-recurring billable charge through the **Bill Correction** feature.

To implement these business requirements, the following changes are made to the system:

- The **Effective Date** field is enabled for editing.
- The effective date is not defaulted on selecting the correction entity.
- Additional option named **Cancel** is introduced in the **Action Flag** list.

**Note:** The **Cancel** option is available only when the effective date is set to the billable charge start date.

### Non-Recurring Billable Charge

While correcting a non-recurring billable charge via a bill correction request, you can opt to edit or cancel the non-recurring billable charge. In both these cases, you need to set the effective date. Note that the effective date must be set to the billable charge start date. If you opt to cancel a non-recurring billable charge, the system will automatically cancel the non-recurring billable charge after all the impacted bills are canceled.

## **Recurring Billable Charge**

While correcting a recurring billable charge via a bill correction request, the system checks whether the recurring billable charge is created manually from the user interface or through any other mechanism. The system behaves in the following manner based on the billable charge feed source (i.e., mechanism through which the billable charge is created in the system):

- If the recurring billable charge is created manually from the user interface, you can opt to make the changes from the start date or any date later than the start date but before the end date. If you opt to make the changes from the start date, the system enables you to do the following:
  - o **Cancel the Billable Charge** – If you opt to cancel the recurring billable charge, the system will identify and cancel all the impacted bills based on the effective date. Once all the impacted bills are canceled, the system will automatically cancel the recurring billable charge.
  - o **Edit the Billable Charge** – If you opt to edit the recurring billable charge, the system will identify and cancel all the impacted bills based on the effective date. Once you edit the recurring billable charge or add a new billable charge, the system will then create the new bills for all the impacted customers or accounts via the bill correction request.

However, if you opt to make the changes from any date later than the start date, the system will enable you to only edit a recurring billable charge. If you opt to edit the recurring billable charge, the system will throw a warning message indicating that the existing billable charge will be end-dated. The system will identify and cancel all the impacted bills based on the effective date. Once all the impacted bills are canceled, the system will update the end date of the recurring billable charge to effective date – 1. For example, if the billable charge period is from 01-Jan-2025 to 31-Dec-2025 and the effective date is set to 01-Apr-2025, then the system will set the end date of the recurring billable charge to 31-Mar-2025. If required, you can create a recurring billable charge for 01-Apr-2025 to 31-12-2025 manually via the bill correction request. The system will then create the new bills for all the impacted customers or accounts via the bill correction request.

- If the recurring billable charge is created through TFM, you cannot directly edit or cancel such recurring billable charges. Instead, you need to select and correct the price assignment using which the recurring billable charge is created through TFM.
- If the recurring billable charge is created through an inbound web service, you can only cancel such recurring billable charge through the **Bill Correction** feature.
- If the recurring billable charge is created through any other mechanism except TFM and IWS, you can opt to make the changes from the start date or any date later than the start date but before the end date. If you opt to make the changes from the start date, the system enables you to only cancel the recurring billable charge. However, if you opt to make the changes from any date later than the start date, the system enables you to only edit the recurring billable charge.

## Address Manual Changes Through Bill Correction

There might be business scenarios wherein there is no change in billable charge or pricing, but the bill needs to be corrected due to some changes which can take place only after the bill is canceled. For example, you may want to update the settlement construct, country-specific VAT percentage, customer exemption list for VAT, etc. In all these business scenarios, we cannot fetch the impacted bills. To handle these business scenarios, the system gives you a provision to cancel a bill and rebill it via a bill correction request. However, all the changes required in the system will have to be taken up manually beyond the purview of bill correction.

A new entity type named **Other** is introduced in this release. You can use this entity type to handle such business scenarios wherein only the bill will be canceled and rebilled via a bill correction request. However, any changes needed in the system will be done from outside the bill correction feature. Once the required updates are made to the system, you can create a new bill for the account.

Note that you cannot use this entity type along with any other entity type, such as Billable Charge and Price Assignment. Once you set the entity type to **Other**, the action flag is automatically set to **Cancel** and all other fields except **Action Note** are disabled. On saving the changes, the bill correction request is created in the **Draft** status. The status is then immediately changed to **Impact Verification Completed**. This is because, in this case, we don't need to verify impacted bills.

Once you submit a bill correction request, the bill is canceled, and the status of the bill correction request is changed to **Correction In Progress**. You can then make the necessary changes in the system. Once the changes are done, you can regenerate the new bill and then freeze and complete it via the bill correction request.

## New Features (Specific to Insurance)

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This section describes the following new features added in this release that can be used in the health insurance domain:

- [Mass Bill Cycle Rule Characteristic Creation or Modification](#)
- [Generate Bill for Each Coverage Period on Late Enrollment or Reinstatement](#)
- [Generate Bill for Each Coverage Period on Account's Hold Release](#)
- [Consider Zero or Negative Bills for Paid Through Date](#)
- [Display Non-Eligible Members' Premium Calculation Lines](#)
- [Audit Account's Bill Cycle Rule Characteristic and Trigger Repricing](#)
- [Delinquency Process Type Derivation Business Rule](#)

### Mass Bill Cycle Rule Characteristic Creation or Modification

Oracle Revenue Management and Billing enables you to create or update bill cycle rule characteristic of multiple accounts at once through the **Upload Request** feature. The **C1-BillCycleRuleCharUpdUplReq** business object enables you to create an upload request for mass bill cycle rule characteristic creation or modification.

You need to create an upload request type for the **C1-BillCycleRuleCharUpdUplReq** business object. You can then upload a mass bill cycle rule characteristic creation or modification file in the CSV format using the respective upload request type. The mass bill cycle rule characteristic creation or modification file should contain records with the following information – account identifier details or account ID and characteristic value with its effective date.

Once you upload a mass bill cycle rule characteristic creation or modification file, the system creates an upload request in the **Draft** status. The data records are created in the **Pending** status. If the mandatory data is missing in any record, the corresponding data record is created in the **Invalid** status. If both the account ID and account identifier details are given in the record, the system gives precedence to the account ID. If the account ID is not specified in the record or if the given account ID is invalid, the system derives the account ID using the respective account identifier type and account identifier combination. If the system could not derive the account ID using the account identifier type and account identifier combination, the status of the corresponding record is changed to **Invalid**.

Once the pending records are validated, the status of the data record is changed to either **Valid** or **Invalid**. On processing a valid record, the system derives the characteristic type specified in the **Bill Cycle Rule Code** option type of the **C1-ASOBLLNG** feature configuration. For each valid record, the system checks whether a billing preference characteristic with the derived characteristic type and effective date combination is already defined for the account. If so, the system updates the existing billing preference characteristic value of the account.

However, if a billing preference characteristic with the derived characteristic type and effective date combination does not exist for the account, the system creates the billing preference characteristic for the account.

Once the billing preference characteristic is successfully created or updated for the account, the status of the data record is changed to **Processed**. However, if any error occurs while creating or updating the billing preference characteristic for the account, the status of the data record is changed to **Error**. Finally, the status of the upload request is changed to **Processed**.

**Note:** This feature is only tested and certified for the fully insured group and individual lines of health insurance business.

## Generate Bill for Each Coverage Period on Late Enrollment or Reinstatement

Until now, the system enabled you to create an automatic invoice request for the respective account whenever an individual membership is enrolled or reinstated. Once this automatic invoice request was processed, the system used to create a bill for the account against the invoice request. However, in case of late enrollment or reinstatement, the system created a single consolidated bill for multiple coverage periods which were yet to be billed (i.e., a bill containing one bill segment for each such coverage period). However, the business requires separate bill for each coverage period instead of one consolidated bill. To implement this business requirement, we have enhanced the existing automatic regular bill generation invoice request feature for the fully insured individual business. The following changes are made to the system:

- The following new characteristic types are introduced in this release:
  - o **Eligible for Separate Coverage Billing (C1-SPCVB)** – You need to define this characteristic type for an account for which you want to create a separate bill for each individual membership coverage period. You can define this characteristic for an account from the user interface, through a membership repricing request, or through a health care inbound message.
  - o **Accounting date of earliest missed coverage (C1-IRSCP)** – On creating an automatic regular bill generation invoice request, the system automatically defines the **C1-IRSCP** characteristic type for the invoice request when the **C1-SPCVB** characteristic of the respective account is set to **Y**.
- The following new parameters are added in the **C1-INVRQIMEN** algorithm type:
  - o **Invoice Request Type for Individual Membership New Enrollment - Separate Bill** – Used to specify the invoice request type using which you want to create an invoice request for an account for which a separate bill must be created for each individual membership coverage period on late enrollment.

- o **Invoice Request Type for Individual Membership Reinstatement - Separate Bill** - Used to specify the invoice request type using which you want to create an invoice request for an account for which a separate bill must be created for each individual membership coverage period on reinstatement.

On an individual membership enrollment or reinstatement, the system will check the following:

- The membership or account to which the membership is billed is eligible for invoice request creation (i.e., the **INVRAC** characteristic type is set to **Y**).
- The bill generation process of the respective account is not kept on hold through a hold request.

If both the above conditions are met, the system will invoke the **C1-INVRQIMEN** algorithm attached to the **Active** status of the **C1-IndMembership** business object. This algorithm will then check whether the **C1-SPCVB** characteristic type is defined for the account and its characteristic value is set to **Y**.

If the **C1-SPCVB** characteristic type is defined for the account and its characteristic value is set to **Y**, the system will create an automatic regular bill generation invoice request where the **C1-IRSCP** characteristic type is set to the accounting date of earliest missed coverage. In case of late enrollment, the accounting date is set based on the membership start date. However, in case of reinstatement, the accounting date is set based on the membership termination date. The status of the invoice request is set to **Defer Processing**. The processing date of the invoice request is set to system date + wait days (defined in the respective invoice request type).

You need to then execute the **C1-INVRQ** batch. On executing the **C1-INVRQ** batch, the system checks whether there are any invoice requests in the **Defer Processing** status. If there is an invoice request in the **Defer Processing** status, the system checks whether the processing date of the invoice request is earlier than or equal to the batch business date. If the processing date is earlier than or equal to the batch business date, the status of the invoice request is changed to **Processing** and the algorithm attached to the **Processing** status is invoked. However, if the processing date is later than the batch business date, the status of the invoice request remains as **Defer Processing**. Once the invoice request is processed, the batch creates multiple bills for the account – one for each coverage period – against the invoice request.

However, if the **C1-SPCVB** characteristic type is not defined for the respective account, the system will create automatic regular bill generation invoice request where the **C1-IRSCP** characteristic type is not defined (i.e., in the traditional manner). The status of the invoice request is set to **Defer Processing Batch**. The processing date of the invoice request is set to system date + wait days (defined in the respective invoice request type). When such invoice request is processed through the billing batches, the system will create a single consolidated bill for multiple coverage periods against the invoice request of the account.

## Generate Bill for Each Coverage Period on Account's Hold Release

Oracle Revenue Management and Billing enables you to create automatic regular bill generation invoice request for an account which is eligible for invoice request creation whenever hold on its bill generation process is released. On manually or automatically releasing a hold on the bill generation process of an account, the system checks whether the **Eligible For Invoice Request Creation (INVRACTE)** characteristic is set to **Y** for the account. If so, the system creates an entry for the account in the **F1\_GEN\_PROC** table and stamps the **C1-IRBHR** batch control against it.

On executing the **C1-IRBHR** batch control, the system considers the records in the **F1\_GEN\_PROC** table. For each record where the batch control is set to **C1-IRBHR**, the batch checks the following:

- The respective account is eligible for invoice request creation (i.e., the **INVRACTE** characteristic type is set to **Y**).
- The bill generation process of the respective account is not kept on hold through a hold request.

If both the above conditions are met, the system creates an invoice request for the account using the invoice request type given in the **Systematic Invoice Request Type for Hold Release** parameter.

The batch then checks whether the **C1-SPCVB** characteristic type is defined for the account and its characteristic value is set to **Y**. If so, the batch stamps the **C1-IRSCP** characteristic type on the invoice request and sets it to the accounting date after the last billed coverage. The status of such invoice request is set to **Defer Processing**. However, if the **C1-SPCVB** characteristic type is not defined for the respective account, the system will not stamp the **C1-IRSCP** characteristic type on the invoice request. The status of such invoice request is set to **Defer Processing Batch**. Once the invoice request is created for an account, the entry for the respective account is removed from the **F1\_GEN\_PROC** table.

**Note:** The processing date of the invoice request is set to system date + wait days (defined in the respective invoice request type).

On executing the **C1-INVRQ** batch, the system checks whether there are any invoice requests in the **Defer Processing** status. If there is an invoice request in the **Defer Processing** status, the system checks whether the processing date of the invoice request is earlier than or equal to the batch business date. If the processing date is earlier than or equal to the batch business date, the status of the invoice request is changed to **Processing** and the algorithm attached to the **Processing** status is invoked. However, if the processing date is later than the batch business date, the status of the invoice request remains as **Defer Processing**. Once the invoice request is processed, the batch creates multiple bills for the account – one for each coverage period – against the invoice request. On executing the billing batches with the **Off Cycle Switch** parameter set to **Y** and **Off Cycle Mode** parameter set to **I**, the system checks whether the account that meets the search criteria is included in any invoice request with the **Defer Processing Batch** status. If the account is included in an invoice request with the **Defer Processing Batch** status, the system checks whether the processing date of the invoice request is earlier than or equal to the batch business date.

If the processing date is earlier than or equal to the batch business date, the system checks whether there is any record in the **PROC** (i.e., **Processing**) status for the account in the invoice request. If so, the system checks whether the pending bill already exists for the account. If the pending bill does not exist for the account, the system checks whether the cutoff date is later than the bill after date. If cutoff date is later than the bill after date, the system checks whether the accounting calendar is open for the accounting date. If the accounting calendar is open for the accounting date, the system creates a single consolidated bill for multiple coverage periods against the invoice request of the account.

**Note:** At present, this feature is tested and certified only for the fully insured individual business and not for any other lines of health insurance business.

## Consider Zero or Negative Bills for Paid Through Date

There might be scenarios where the zero or negative amount bills may be generated for an account to which an individual membership is billed and no payments are expected from such accounts. In such case, until now, the system did not update paid through date when zero or negative amount bill was created for an individual membership. Now, when the zero or negative amount bill is created for an account to which an individual membership is billed, the system also creates an entry for such account in the **F1\_GEN\_PROC** table and stamps the **PTDIND** batch control against it. The **C1-CLCPTDIND** algorithm is enhanced to consider zero or negative amount bill for the accounts. It then accordingly determines last billed coverage end date and calculates the paid through date of the account. Therefore, now, on executing the **PTDIND** batch, the system accordingly updates the paid through date of the account considering its zero or negative amount bills.

## Display Non-Eligible Members' Premium Calculation Lines

Until now, the system did not consider members who are beyond maximum allowed dependent limit for age based premium calculation and therefore no calculation lines were created for such non-eligible members. Now, the system allows you configure whether you want to create calculation lines for such non-eligible members and display them in the **Pricing Calculation Details** zone of the **Charges** tab on the **Membership** screen. To implement this business requirement, the following changes are made to the system:

- A new option type named **Display non-eligible members beyond max dependent count** is introduced in the **C1-ASOBLLNG** feature configuration.
- A new value named **DEMD** (i.e., Dependent is exceeding the max dependent count) is added in the **NEW\_BORN\_CMT\_FLG** lookup field.
- The **C1\_AGEPREM** algorithm is enhanced to consider the **Display non-eligible members beyond max dependent count** option type of the **C1-ASOBLLNG** feature configuration and accordingly create calculation lines for non-eligible members who are beyond maximum allowed dependent count.

If the **Display non-eligible members beyond max dependent count** option type of the **C1-ASOBLLNG** feature configuration is set to **Y**, the system will create calculation lines for non-eligible members who are beyond maximum allowed dependent count. The amount of such calculation lines will be zero.

These calculation lines will then be shown in the **Pricing Calculation Details** zone of the **Charges** tab on the **Membership** screen. However, to differentiate between calculation lines of eligible and non-eligible members, the following string will be added in the **Comments** column corresponding to non-eligible members' calculation lines - **Dependent is exceeding the max dependent count**.

In case of skip months scenario, the system will display calculation lines (with zero amount) for non-eligible members too but will add the **Dependent is exceeding the max dependent count** comment instead of the **Skip Month** comment against it. Similarly, if a newborn is not an eligible dependent member, the system will display a calculation line (with zero amount) for the newborn too but will add the **Dependent is exceeding the max dependent count** comment against it.

**Note:** This feature is tested and certified for the fully insured group and fully insured individual lines of business.

## Audit Account's Bill Cycle Rule Characteristic and Trigger Repricing

Oracle Revenue Management and Billing provides the ability to audit an account whenever the billing preference characteristic type (specified in the **Bill Cycle Rule Code** option type of the **C1-ASOBLLNG** feature configuration) is defined or updated for the account. Note that the audit process is triggered only when the bill period derived from the billing preference is changed for the account. To enable this feature, you need to do the following:

- Attach the **C1-FIAUDEV** or **C1-REAUDEVNT** algorithm to the **Audit** system event of the **C1-AccountBO** business object.

**Note:** If you want to enable this feature for the fully insured individual business, you need to attach the **C1-FIAUDEV** algorithm. However, if you want to enable this feature for the fully insured group business, you need to attach the **C1-REAUDEVNT** algorithm.

- Create an audit event type for the **C1-AccountBO** business object where the following element of the account is audited:

| Element Type   | Element Name                             | Element Value        |
|----------------|------------------------------------------|----------------------|
| Characteristic | accountCharacteristic/characteristicType | Bill Cycle Rule Code |

- Include the audit event type in the required primary pricing rule type.

**Note:** The audit process is not applicable when you to directly update the bill cycle from the user interface or through an inbound web service. It is applicable only when the billing preference characteristic is added or updated for an account.

When the billing preference characteristic type is defined or updated for an account either from the user interface or through an inbound web service, the system derives the bill period from the billing preference. If the bill period is changed for the account, the system creates an audit event and sets its status to **Pending**. An effective date is stamped corresponding to the audit event which later helps in deriving the timeline during premium calculation.

The system sets the effective date of an audit event in the following manner:

- If you add or update the billing preference characteristic type of an account from a period for which billing is yet pending, the system sets the effective date of the audit event to the characteristic effective date.
- If you add or update the billing preference characteristic type of an account from a period for which billing is already completed, the system sets the effective date of the audit event to the Latest Bill Segment End Date + 1.
- If you add or update the billing preference characteristic type of an account from any date other than the start of the bill period, the system sets the effective date of the audit event to the start date of the next bill period.
- If you add or update the membership details along with the billing preference characteristic type of the respective account, the system sets the effective date of the audit event to the membership audit effective date or characteristic effective date whichever is earliest.

**Note:** Before creating an audit event, the system checks whether an audit event for the account ID with the same effective date already exists in the **Pending** or **Error** status for the respective action. If so, the system does not create a new audit event for the account. Instead, the system adds a new log entry in the existing audit event.

Once the audit event is created, the system does the following for the respective business:

- **Fully Insured Individual Business** – The system derives the membership that is billed through the account. If the category of the membership is set to **INDV**, the system identifies the health plan to which the membership belongs. It then derives the pricing rule types whose active pricing rules are defined on the respective health plan. A repricing entity detail record is then created for each membership, pricing rule type, and effective date combination in the **CI\_REPRC\_ENTITY\_DTL** table. The status of the repricing entity detail record is set to **Pending**. Once the repricing entity detail records are created successfully, the status of the audit event is changed to **Complete**. However, if an error occurs while creating the repricing entity detail records for an audit event, the status of the audit event is set to **Error**.
- **Fully Insured Group Business** – The system derives the main customer of the account. If the main customer of the account is **Bill Group**, the system leaves the audit event in the **Pending** status. You need to then execute a new batch named **C1-FIACT**. This batch checks whether there is any audit event created for an account in the **Pending** status. If so, it extracts the list of group memberships which are billed to the account and identifies the policy plan to which these memberships belong. It then derives the pricing rule types whose active pricing rules are defined on the respective policy plan. A repricing entity detail record is created for each membership, pricing rule type, and effective date combination in the **CI\_REPRC\_ENTITY\_DTL** table. The status of the repricing entity detail record is set to **Pending**. Once the repricing entity detail records are created successfully, the status of the audit event is changed to **Complete**. However, if an error occurs while creating the repricing entity detail records for an audit event, the status of the audit event is set to **Error**.

**Note:** The following batches should be executed in the specified sequence – **C1-FIBLR**, **C1-FIMRE**, **C1-FIACT**, **C1-CBIPR**, **C1-FIMRC**.

To recalculate the membership premium, you need to then execute the following batches in the specified order – **C1-REPC1, C1-REPC2, C1-REPC3, C1-FIBCR**.

**Note:** This feature is tested and certified for the fully insured group and individual lines of health insurance business.

## Delinquency Process Type Derivation Business Rule

Oracle Revenue Management and Billing enables you to define business rules for determining the delinquency process type for an account to which an individual membership is billed. The insurance company may want to use different delinquency process type for different accounts based on certain parameters. The system will then accordingly derive the delinquency process type using which delinquency process should be created for the account.

While defining the delinquency process type derivation business rule criteria, you can use the parameters which are defined on the following entities:

- Account
- Customer Class
- Delinquency Event Type
- Division
- Health Plan
- Health Product
- Membership
- Membership Person

You can define, edit, and delete a delinquency process type derivation business rule through the **Business Rule** screen. While defining a delinquency process type derivation business rule, you need to set its category to **Delinquency Process Type Derivation Business Rule** and specify the following details:

- **Criteria Description** – Used to indicate the business criteria that an account or its each billed individual membership must satisfy in order to derive the delinquency process type from the business rule.
- **Effective Date** – Used to specify the date from when the business rule is effective.
- **Status** – Used to indicate the status of the business rule. The valid values are **Active** and **Inactive**.
- **Delinquency Process Type** – Used to indicate the delinquency process type. The list includes only those delinquency process type which are already defined in the system.

You can view the delinquency process type derivation business rules through the **Business Rule** screen.

## Enhancements (Generic)

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This section lists the enhancements made to the following features that are used in both financial services and health insurance domains:

- [File Upload Interface](#)
- [Transaction Feed Management](#)
- [Content Migration Assistant \(CMA\)](#)

### File Upload Interface

Until now, the division level access security was not available while uploading a file and while viewing the details of an uploaded file through the **File Upload Dashboard** screen. To implement this data privacy requirements, the following changes are made to the system:

- A new field named **Division Filter Required** is available while defining a file request type. It indicates that the user who has access to a division can only upload a file for the respective division.
- A new parameter named **Division Code/Division Group code** is added in the **C1-FTRAN** batch control. It is used to indicate that you want to upload a file for a particular division or division group. Note that you can upload a file for a division only when you have access to the division. You cannot specify comma-separated values for this parameter. This parameter is mandatory when the **Division Filter Required** option is selected in the given file request type. However, note that you cannot specify a division when the **Division Filter Required** option is not selected for the given file request type.
- If you upload a file for a specific division, then only the users who have access to the division can view the details of the pending, processed, error, retry, ignore, skipped, in progress, and retry limit extended records. In other words, the user can see the hyperlinks corresponding to a file in the **Search File** zone of the **File Upload Dashboard** screen only when the user has access to the respective division for which the file is uploaded. Otherwise, the statistics of a particular file would only be visible to the user who do not have access to the respective division for which the file is uploaded.

## Transaction Feed Management

The following changes are made to the Transaction Feed Management feature:

- Until now, when you selected the **Transaction Level Details** option from the **Search By** list of the **Search** zone in the **Feed Management Dashboard** screen, you were able to search the transactions of a particular account. Now, in addition, you can search the transactions of a particular person (i.e., all the transactions of the accounts that belong to a person). You can also opt to view all the transactions of the accounts in the person's hierarchy. To implement these requirements, the following changes are made to the system:
  - If you select the **Transaction Level Details** option from the **Search By** list, the following additional fields are available in the **Search Criteria** section - **Person Identifier Type**, **Person Identifier**, **Person Name**, and **Hierarchy**.
  - If you select the **Transaction Level Details** option from the **Search By** list, the following additional columns are available in the **Search Results** section - **Person Name**, **Person Identifier Type**, and **Primary Person Identifier**.

Note that, if the **Hierarchy** option is selected, the system will list all the transactions of the person, its child persons, and its grandchild persons from the hierarchy that meet the criteria.

- Until now, when you selected the **Transaction Level Details** option from the **Search By** list of the **Search** zone in the **Feed Management Dashboard** screen, you were able to search for the transactions in the **Error** status for a particular account. Now, in addition, you can search the error transactions of a particular person (i.e., all the error transactions of the accounts that belong to a person). The system then accordingly shows the number of error transactions. On clicking the transaction count, the system will retrieve all the error transactions of the respective person in the **Transaction Level Information** zone. If the **Hierarchy** option is selected, the system will list all error transactions of the person, its child persons, and its grandchild persons from the hierarchy that meet the criteria.

## Content Migration Assistant (CMA)

The following changes are made to the CMA feature:

- Until now, customers were not able to seamlessly migrate configuration data from one environment to another using CMA due to various issues, such as field definition mismatch, design issues, coding issues, etc. To fix these issues, we have updated the following objects:

| Object Type        | Object Name                                                    |
|--------------------|----------------------------------------------------------------|
| Maintenance Object | C1_ACCR_CYC, TENEDR CTL, C1_PRC_CRIT, C1_PRODUCT, C1-AUDITEVNT |
| Business Object    | C1_F_ADDPLBO                                                   |

| Object Type  | Object Name                                                                                                                                    |
|--------------|------------------------------------------------------------------------------------------------------------------------------------------------|
| Field        | APPTXN_REASON_TYPE, APP_REASON_REQ_FLG, APP_TXN_TYPE, ENABLED_FLG, FIELD_RULE_FLG, HOLD_PROCESS_FLG, LIST_FLG, OPERATOR_FLG, PREVALIDATION_FLG |
| Lookup Field | ENABLED_FLG, FIELD_RULE_FLG, APPTXN_REASON_TYPE, HOLD_PROCESS_FLG                                                                              |

- We have shipped the following out-of-box migration plans in this release:
  - o C1-AccrualCycle
  - o C1-AuditEvent
  - o C1-AuditEventType
  - o C1-AutopayRequestType
  - o C1-BillCorrectionType
  - o C1-DealAprofandDealType
  - o C1-DivisionGroup
  - o C1-EntityHierarchy
  - o C1-PriceList
  - o C1-Product
  - o C1-RateEntities
  - o C1-TenderControl
  - o C1-TieringCriteria

## Enhancements (Specific to Financial Services)

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This section lists the enhancements made to the following feature that is used in the financial services domain:

- [C1\\_PRICING Feature Configuration](#)
- [Default Bill Cutoff Date](#)
- [Deal Pricing Management](#)
- [Unified Search Feature](#)
- [Bill Correction](#)
- [Billing](#)
- [C1-BILLCORR Feature Configuration](#)
- [Billing Anomaly Detection Using Machine Learning](#)

### C1\_PRICING Feature Configuration

The following option type is newly added in the C1\_PRICING feature configuration:

- **Associate Price Item Relationship Type For Lesser Pricing** – Used to indicate the relationship type that you can use while associating two or more price items whose pricing should be validated as the SEPA norms in a deal. You must set this option type to **SEPA**.

### Default Bill Cutoff Date

Until now, the system derived the default cutoff date while generating a bill from the user interface. Now, a new option type named **Derive Cutoff Date** is added in the **C1\_FINTRANOP** feature configuration. It is used to indicate whether the system should derive the default cutoff date while generating a bill from the user interface. The valid values are **Y** and **N**. If you set this option type to **Y**, the system will derive the default cutoff date and set the accounting date to the system date. However, if you set this option type to **N**, the system sets the cutoff date and accounting date to the system date. You can then change the cutoff date and accounting date, if required. If you do not specify this option type, the system will, by default, set its value to **N**.

### Deal Pricing Management

The following changes are made to the Deal Pricing Management feature:

- Now, you can enable the deal win probability feature for the required divisions. For more information, see [Deal Win Probability Using Machine Learning \(ML\)](#).
- A new column named **Win Probability** is added in the **Pricing and Commitments** section of the **Pricing and Commitments** screen. Similarly, a new column named **Win Probability** is added in the **Deal Financial Summary** section of the **Deal Information** screen.

## Unified Search Feature

Until now, the **Search Assistant** feature in the **Application** toolbar enabled you to search for business entities (such as persons and accounts) in addition to the standard search for menu items. For example, you were able to search for a person using its name or primary identifier and search for an account using its primary identifier. The system then displayed information about the respective person or account in the **Customer 360° Information** screen. You could also directly access the **Customer 360° View** screen by clicking the **Advanced Search** link in the **Search** field.

Now, this feature is enhanced to provide the following quick search options apart from the **Customer Search** option:

- **Pricing Approval Search** – Used when you want to search for price assignments of a person or an account in the **Approve Price Assignment** screen. The approver can then review and accordingly approve or reject the price assignments of the person or account based on the observations.
- **Price List Assignment Search** – Used when you want to search for price list assignments of a person or an account in the **Price List Assignments** screen.
- **Pricing Search** – Used when you want to search for effective price assignments of a person or an account in the **Pricing (Person)** and **Pricing (Account)** screens, respectively.
- **Billing Search** – Used when you want to search for bills of a person or an account in the **Bill Drill Down Details** screen.
- **Deal Search** – Used when you want to search for deals of a person or an account in the **Deal Dashboard** screen.

### Points to Note:

You can also directly access the **Approve Price Assignment** screen without giving any search criteria by clicking the **Advanced Search** link after selecting the **Pricing Approval Search** search option.

You can also directly access the **Price List** screen without giving any search criteria by clicking the **Advanced Search** link after selecting the **Price List Assignment Search** search option.

You can also directly access the **Customer 360° View** screen without giving any search criteria by clicking the **Advanced Search** link after selecting the **Pricing Search** search option.

You can also directly access the **Bill Drill Down Details** screen without giving any search criteria by clicking the **Advanced Search** link after selecting the **Billing Search** search option.

You can also directly access the **Deal Dashboard** screen without giving any search criteria by clicking the **Advanced Search** link after selecting the **Deal Search** search option.

On clicking the **Search Assistant** icon, you can select the required search option – **Pricing Approval Search**, **Price List Assignment Search**, **Pricing Search**, **Billing Search**, **Deal Search**, **Customer Search**. By default, the **Customer Search** option is selected.

Once you select the required option, you can specify the person name, primary person identifier, and primary account identifier using the **n:**, **id:**, and **aid:** hints, respectively, and then click the **Advanced Search** link. The system will navigate to the above-mentioned screens based on the search option selected and list the information of the respective person or account. For example, if you search for a person or account using the **Pricing Approval Search** option, the system will list the person or account in the **Approve Price Assignment** screen and then you can view the price assignments of the respective person or account which are yet to be reviewed by the approver.

Similarly, if you search for a person or account using the **Deal Search** option, the system will list all the deals created for the respective person or account in the **Search Deal** zone of the **Deal Dashboard** screen. Note that the search filters are automatically populated in these screens depending on whether you are searching details of a person or an account.

**Note:** The recent search history is also maintained for each search option in the **Search Assistant** tool.

## Bill Correction

The following changes are made to the Bill Correction feature:

- You can filter the billable charges in the **Billable Charge – Entity** window using the following fields - **Price Item**, **Feed Source Flag**, **Recurring Method**, **Bill Period**, and **Invoice Frequency**. The **Bill Period** field appears only when the **Bill Period** option is selected from the **Recurring Method** list. Similarly, the **Invoice Frequency** field appears only when the **Frequency** option is selected from the **Recurring Method** list. You can filter the billable charges in the **Billable Charge – Entity** window based on the feed source flag. The feed source indicates the source or mechanism through which the billable charge is created in the system. The valid feed source flag values are:
  - o **Bill API Billable charge** – Used when you want to filter the billable charges that are created through an inbound web service.
  - o **Manual Billable Charge** – Used when you want to filter the billable charges that are created manually from the user interface.
  - o **Pricing Rule** – Used when you want to filter the billable charges that are created using a pricing rule through a background process.
  - o **TFM Billable charge** – Used when you want to filter the billable charges that are created through the TFM feature.
  - o **TFM Billable Charge created using Service** – Used when you want to filter the billable charges that are created through TFM using an inbound web service.
- You can filter the price assignments in the **Price Assignment – Entity** window using the following fields - **Price Item** and **Price Assignment Type**.

- Now, while creating a disaggregation request, the system checks whether a pending disaggregation request already exists for the account. If so, the system does not create a new disaggregation request for the account. However, if the pending disaggregation request does not exist for the account, the system checks whether a pending disaggregation request already exists for the account and price assignment combination. If so, the system does not create a new disaggregation request for the account and price assignment combination. However, if the pending disaggregation request does not exist for the account and price assignment combination, the system creates a new disaggregation request for the account and price assignment combination in the **Pending** status. The price assignment type in the disaggregation request is set to **Regular**.
- Until now, you were able to correct only regular price assignments through the **Bill Correction** feature. Now, in addition, you can correct post-processing price assignments through the **Bill Correction** feature.
- Until now, when a bill correction request with multiple cyclic bills of an account in the **Deferred Regeneration** status was processed through the billing batches (i.e., BILLOPEN, BSGENREG and POSTPROC), you had to execute the billing batches multiple times in the correction mode to regenerate each bill of the account. Now, this issue is fixed in the BILLOPEN, BSGENREG and POSTPROC batches. Now, when a bill correction request with multiple cyclic bills of an account in the **Deferred Regeneration** status is processed through the billing batches, the system will create all the cyclic bills of the account in the single run.
- Until now, when you executed the **C1-BILCN** batch with the batch mode set to **C**, the system canceled all the impacted bills of the given bill correction request. Now, in addition, this batch does the following:
  - o It checks whether the correction entity is set to **Billable Charge** and the action flag is set to **Cancel**. If so, the batch will cancel the recurring or non-recurring billable charge.
  - o It checks whether the correction entity is set to **Billable Charge**, the action flag is set to **Edit**, and the effective date is later than the recurring billable charge start date. If so, the batch will set the end date of the recurring billable charge to effective date – 1.

## Billing

The following changes are made to the Billing feature:

- A new algorithm type named **C1-BCHGINFO** is introduced in this release. This algorithm generates billable charge information string using the given fields and delimiter. You need to create an algorithm using the **C1-BCHGINFO** algorithm type and attach it to the **Information** system event of the **BILL CHARGE** maintenance object. Also, you need to set the foreign key reference in the maintenance object option type to **C1-BLCRG**.
- The **Previous bill Comparison: DT = Create Datetime, BP = Last Bill Period** parameter is added in the **C1-BILLTOLR** algorithm type. It enables the system to determine whether to consider the previous bill based on the creation date or last bill period. The system will then compare the current bill against the respective previous bill of the account. The valid values are:
  - o **DT** – Used when you want the system to consider the previous bill based on the creation date.
  - o **BP** – Used when you want the system to consider the previous bill based on the last bill period.

If you do not specify the value for this parameter, by default, it is set to **DT**.

## C1-BILLCORR Feature Configuration

The following option types are newly added in the C1-BILLCORR feature configuration:

- **Submitter To Do Type Message Category** – Used to specify the message category. It is used when the message category is not specified in the submitter To Do type.
- **Submitter To Do Type Message Number** - Used to specify the message number. It is used when the message number is not specified in the submitter To Do type.

## Billing Anomaly Detection Using Machine Learning

The following changes are made to the Billing Anomaly Detection feature:

- Now, to enable the billing anomaly detection feature for the financial services domain in ORMB, you need to do the following:
  - o Set the **Billing Anomaly Detection Feature Opt-In** option type of the **C1-AIMLFC** feature configuration to **BK**.
  - o Enable the billing anomaly detection feature for the required divisions through the master configuration created using the **C1-AIMLMST** business object.
  - o Set the **C1-BRPAO** characteristic type for the person or account for which you want to detect billing anomalies using machine learning. If you set the characteristic type to **Yes** for a person, the system will detect billing anomalies for its accounts except for those accounts where the **C1-BRPAO** characteristic type is set to **No**.

- o Set the **C1-SKPBV** characteristic type for the person or account for which you want to skip the anomaly detection before bill completion when any of its bill is already anomalous. If you set the **C1-SKPBV** characteristic type **Yes** for a person or an account, the system will skip the anomaly detection process and complete the bills of the respective person or account when any of its bill is already anomalous.
- The following fields are newly introduced when you use the **Account/Bill Level Anomaly** or **Bill Segment Level Anomaly** option from the **Search By** list in the **Search Anomaly** zone of the **Diagnostic Central** screen - Person Identifier Type, Person Identifier.
- Now, the values appear in the **Anomaly Reason** list while viewing the bill segment level anomaly only when the **Billing Anomaly Detection Feature Opt-In** option type of the **C1-AIMLFC** feature configuration is set to **BK** or **ASO**. If the **Billing Anomaly Detection Feature Opt-In** option type of the **C1-AIMLFC** feature configuration is set to **BK**, the values displayed in the **Anomaly Reason** list are – BSEG Amount Variation, SQI Variation, Pricing Change. However, if the **Billing Anomaly Detection Feature Opt-In** option type of the **C1-AIMLFC** feature configuration is set to **ASO**, the values displayed in the **Anomaly Reason** list are – BSEG Amount Variation, Line Item Variation, Pricing Change.

## Enhancements (Specific to Insurance)

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This section lists the enhancements made to the following features that are used in the health insurance domain:

- [Payments](#)
- [C1-PAYPORTAL Feature Configuration](#)
- [Customer 360° Information](#)
- [Policy and Policy Plan](#)
- [Group and Individual Memberships](#)
- [Membership Benefits](#)
- [Repricing](#)
- [Refund Request](#)
- [Level Funded Pricing](#)
- [Minimum Premium Program Pricing](#)
- [C1-ASOBLLNG Feature Configuration](#)
- [Support Open-Ended Entities](#)
- [Automatic Offset of Debit and Credit Bill Line Items](#)
- [Billable Charge Creation or Cancellation through File Upload Interface](#)
- [Delinquency Management](#)

### Payments

The following changes are made to the Payments feature:

- The **PAY FRZ O-I** algorithm type is enhanced to address or overcome the performance issues faced while freezing a payment having large number of payment segments. It can be used independently or in conjunction with other algorithms. If you attach algorithms to the **FT Freeze** and **Payment Freeze** system events of the customer class, the system checks the following while executing the algorithm attached to the **FT Freeze** system event:
  - Whether the number of payment segments in the payment exceeds the limit specified in the **Optimize Payment Process Count** option type of the **C1-PAYPORTAL** feature configuration.

If the number of payment segments in the payment exceeds the specified limit, the system executes the **PAY FRZ O-I** algorithm and skips the algorithm attached to the **FT Freeze** system event. However, if the number of payment segments in the payment is less than or equal to the specified limit, the system executes the logic defined in the algorithm attached to the **FT Freeze** system event.

While freezing a payment, the **PAY FRZ O-I** algorithm considers the **Batch Update Size** option type of the **C1-PAYPORTAL** feature configuration. The **Batch Update Size** option type indicates the number of FT extension transactions that you want to execute in the database at once during the payment freeze. This significantly reduces the overhead of multiple round trips, leading to improved performance, especially when dealing with payments having large number of payment segments.

- A new algorithm type named **C1-CNCLPAYMT** is introduced which enables you to address or overcome the performance issues faced while cancelling a payment having large number of payment segments. It can be used independently or in conjunction with other algorithms. If you attach algorithms to the **FT Freeze** and **Payment Cancellation** system events of the customer class, the system checks the following while executing the algorithm attached to the **FT Freeze** system event:
  - o Whether the number of payment segments in the payment exceeds the limit specified in the **Optimize Payment Cancel Process Count** option type of the **C1-PAYPORTAL** feature configuration.

If the number of payment segments in the payment exceeds the specified limit, the system executes the **C1-CNCLPAYMT** algorithm and skips the algorithm attached to the **FT Freeze** system event. However, if the number of payment segments in the payment is less than or equal to the specified limit, the system executes the logic defined in the algorithm attached to the **FT Freeze** system event.

The **C1-CNCLPAYMT** algorithm cancels a payment, its corresponding payment segments, and the respective financial transactions (FTs). When a payment FT is canceled, it creates a new match event which links the original payment FT with its payment cancellation FT. The status of the new match event is set to **Balanced**. If the original match event is linked to any other payment FT, the status of the original match event is changed to **Open**. However, if the original match event is not linked to any other payment FT, the status of the original match event is changed to **Canceled**. While cancelling the match event, the system considers the cancel reason specified in the **Match Event Cancel Reason** parameter. In addition, a message is added to the canceled match event using the given message category and message number. The message is then shown in the **Remarks** field in the **Match Event** screen. This algorithm also creates FT extension records for the payment cancellation FTs.

While cancelling a payment, this algorithm considers the **Batch Update Size** option type of the **C1-PAYPORTAL** feature configuration. The **Batch Update Size** option type indicates the number of FT extension transactions that you want to execute in the database at once during the payment cancellation. This significantly reduces the overhead of multiple round trips, leading to improved performance, especially when dealing with payments having large number of payment segments.

## C1-PAYPORTAL Feature Configuration

The following option types are newly added in the C1-PAYPORTAL feature configuration:

- **Optimize Payment Process Count** – Used when you want to fix performance issue during payment freeze. If the payment segment count during the payment freeze exceeds the specified limit, the system invokes the **PAY FRZ O-I** algorithm attached to the **Payment Freeze** system event of the respective customer class. However, if the payment segment count during the payment freeze is less than or equal to the specified limit, the system executes the logic defined in the following:
  1. Algorithm attached to the **FT Freeze** system event of the respective customer class.
  2. Algorithm attached to the **FT Freeze** system event of the respective contract type.
- **Optimize Payment Cancel Process Count** – Used when you want to fix performance issue during payment cancellation. If the payment segment count during the payment cancellation exceeds the specified limit, the system invokes the **C1-CNCLPAYMT** algorithm attached to the **Payment Cancellation** system event of the respective customer class. However, if the payment segment count during the payment cancellation is less than or equal to the specified limit, the system executes the logic defined in the following:
  1. Algorithm attached to the **FT Freeze** system event of the respective customer class.
  2. Algorithm attached to the **FT Freeze** system event of the respective contract type.
- **Batch Update Size** – Used to specify the number of FT extension transactions that you want to execute in the database at once during the payment freeze and cancellation. The system then uses JDBC batch processing that allows to group multiple SQL statements into a single batch and sends them to the database in one network trip. This significantly reduces the overhead of multiple round trips, leading to improved performance, especially when dealing with payments having large number of payment segments. If you do not specify the value, the system, by default, sets it to 500.
- **Batch Insert for FT GL** – Used to indicate whether the financial transaction general ledger (FTGL) records should be inserted using the prepared statement batch mode while freezing a payment. The valid values are **Y** and **N**.
- **Skip FT Ext Insert** – Used to indicate whether you want to skip method calls that insert entries into the **C1\_FT\_EXT** table during the optimize payment freeze process (i.e., when the **PAY FRZ O-I** algorithm is executed). The valid values are **Y** and **N**.

## Customer 360° Information

The following changes are made to the Customer 360° Information screen:

- Earlier, the system was unable to fetch bills and payments for accounts having future dated effective address in the **Billed Vs Paid** zone of the **Account** tab. This issue is fixed and now bills and payments for accounts having future dated effective address are also listed in the **Billed Vs Paid** zone.
- The **Address** and **City/State/Postal** column names are no longer available in the panel that appears at the bottom of the zone when you click the **Column Configuration** (⚙️) icon.

## Policy and Policy Plan

The following changes are made to the Policy feature:

- The **Add** option corresponding to the **Policy** menu option in the **Customer Management** menu is removed as the system will no longer allow you to add self-funded group or fully insured group policies from the user interface. You can only add these policies through a health care inbound message.
- The **Add** button in the page title area of the **Policy (Used for Searching)** screen is also removed.
- Earlier, the **Edit** button appeared in the **Record Actions** section when the fully insured group policy was in the following statuses – **In Force/Active**, **Canceled**, **Pending Cancellation**, **Pending**, **Pending Reinstatement**, **Pending Termination**, or **Terminated**. Now, the **Edit** button will not appear when you are viewing the details of a fully insured group policy in any of these statuses. The system will allow you to edit the details of a fully insured group policy only through a health care inbound message. However, note that the **Edit** button will still be available in the user interface for a self-funded group policy.
- The **Initiate Termination** and **Terminate** buttons are removed for the fully insured group policies from the **Record Actions** section. Now, you can only initiate termination for a fully insured group policy through a delinquency process. Similarly, you can only terminate a fully insured group policy through a health care inbound message.
- The **Add** link is removed from the upper-right corner of the **Plans** and **Memberships** zones on the **Plan** tab. This is because you can now add policy plans to a policy only through a health care inbound message. Similarly, you can now add memberships to a policy plan only through a health care inbound message.
- The **Edit** column is removed from the **Plans** zone of the **Plan** tab. This is because you can now edit the details of a policy plan only through a health care inbound message.
- The **Add** link is removed from the upper-right corner of the **Policy Plan** and **Memberships** zones in the **Policy Plan** screen. This is because you can now add policy plans to a policy only through a health care inbound message. Similarly, you can now add memberships to a policy plan only through a health care inbound message.

- The **Edit** button is removed from the **Policy Plan** zone of the **Policy Plan** screen. This is because you can now edit the details of a policy plan only through a health care inbound message.

## Group and Individual Memberships

The following changes are made to the Membership feature:

- The **Add** option corresponding to the **Membership** menu option in the **Customer Management** menu is removed as the system will no longer allow you to add group and individual memberships from the user interface. You can only add these memberships through a health care inbound message.
- The **Add** button in the page title area of the **Membership (Used for Searching)** and **Membership (Used for Viewing)** screens is also removed.
- The **Edit** and **Cancel** buttons are removed from the **Record Actions** section of the **Membership (Used for Viewing)** screen. This is because you can edit or cancel a group or individual membership only through a health care inbound message.
- The **Add Person** link is removed from the upper-right corner of the **Member Persons** zone in the **Policy Plan** screen. This is because you can now add persons in a group or individual membership only through a health care inbound message.
- Until now, you were able to edit the details of a member person from the user interface. Now, you can only edit the characteristics of a member person from the user interface. All other details of a member person can only be edited through a health care inbound message.

## Membership Benefits

The following changes are made to the Membership Benefits feature:

- The **Add** option corresponding to the **Benefit** menu option in the **Customer Management** menu is removed as the system will no longer allow you to add membership benefits from the user interface. You can only add membership benefits through a health care inbound message.
- The **Add** button in the page title area of the **Benefit (Used for Searching)** and **Benefit (Used for Viewing)** screens is also removed.
- The **Edit** and **Discard** buttons are removed from the **Record Actions** section of the **Benefit (Used for Viewing)** screen. This is because you can edit or discard a membership benefit only through a health care inbound message.

## Repricing

The following changes are made to the Repricing feature:

- The **State** parameter is added to the **C1-REPC1**, **C1-REPC2**, and **C1-FIBCR** batches. It is used when you want to trigger the repricing process for only those group or individual memberships which are issued in a particular state. The system derives the state of issue for a group membership from the group membership, policy plan, or policy level (in the given sequence wherever present) using the characteristic type specified in the **State of Issue Characteristic Type** option type of the **C1-ASOBLNG** feature configuration. On the other hand, the system derives the state of issue for an individual membership from the individual membership or health plan level (in the given sequence wherever present) using the characteristic type specified in the **State of Issue Characteristic Type** option type of the **C1-ASOBLNG** feature configuration. The batch considers the **State of Issue** characteristic which is effective on the batch business date. If the batch business date is not specified, the batch considers the **State of Issue** characteristic which is effective on the system date. However, note that, once the memberships are filtered based on the state, the above batches will reprice and create billable charges for the entire membership coverage period irrespective of whether the **State of Issue** characteristic is effective for the entire membership coverage period or not. You can use the **State** parameter only when the **Membership Category Flag** parameter is set to **INDV** or **GRUP** while submitting the above batches.

### Points to Note:

You cannot specify comma-separated values for the **State** parameter.

You should not run a parallel batch for the same state. Otherwise, erroneous results might occur.

## Refund Request

The following changes are made to the Refund Request feature:

- Earlier, while editing the address in a refund request, the system did not allow you to edit the exiting address on clicking the **Override Address** option. It only allowed you to select a new address using the **Search** functionality. Now, on clicking the **Override Address** option, all the address related fields are editable. You can either update the existing address or select a new address using the **Search** functionality. However, on clicking both the **Override Address** and **Enter Address Manually** options, all the address related fields are cleared and you can enter a new address manually.

## Level Funded Pricing

The following changes are made to the Level Funded Pricing feature:

- A new column named **Arrangement Value Editable** is available in the **Settlement Rules** section while defining a level funded pricing rule type. If you select the **Arrangement Value Editable** option corresponding to the settlement rule, you can edit the arrangement value while defining a level funded pricing rule using the respective pricing rule type. However, if you do not select the **Arrangement Value Editable** option corresponding to the settlement rule, you cannot edit the default arrangement value derived from the respective pricing rule type.

## Minimum Premium Program Pricing

The following changes are made to the Minimum Premium Program Pricing feature:

- A new column named **Arrangement Value Editable** is available in the **Settlement Rules** section while defining a minimum premium program pricing rule type. If you select the **Arrangement Value Editable** option corresponding to the settlement rule, you can edit the arrangement value while defining a minimum premium program pricing rule using the respective pricing rule type. However, if you do not select the **Arrangement Value Editable** option corresponding to the settlement rule, you cannot edit the default arrangement value derived from the respective pricing rule type.

## C1-ASOBLLNG Feature Configuration

The following two option types are newly added in the C1-ASOBLLNG feature configuration:

- **Display non-eligible members beyond max dependent count** – Used to indicate whether you want to display calculation lines for non-eligible members who are beyond maximum allowed dependent limit. The valid values are **Y** or **N**. If you do not specify the value for this option type, by default, it will be set to **N**.
- **Enrollment End Date for Open-Ended Entities** – Used to specify the enrollment end date for open-ended entities. You must specify the value in the **YYYY-MM-DD** format.

## Support Open-Ended Entities

Until now, for the policy, policy plan, health plan, group membership, individual membership, member person, or membership benefit, the system referred the date from the **END\_DT/ENRL\_END\_DT** column of the respective table and displayed it as the end date for the respective entity in the user interface.

Now, the system enables you to configure whether the end date of open-ended entities should be left blank when the enrollment end date is a far future date. A new option type named **Enrollment End Date for Open-Ended Entities** is added in the **C1-ASOBLLNG** feature configuration. It enables you to specify the enrollment end date for open-ended entities. If the enrollment end date of the policy, policy plan, health plan, group membership, individual membership, member person, or membership benefit matches the date specified in the **Enrollment End Date for Open-Ended Entities** option type, the system will not show the end date of the respective entity in the user interface (i.e., leaves the end date of the respective entity blank).

## Automatic Offset of Debit and Credit Bill Line Items

Until now, the **C1-AUTOM** batch considered the accounts for auto maintenance when the following conditions were met:

- The **Skip Auto Maintenance** field of the account is set to **N**.
- Either of the following criteria is met for the account:
  - o Total amount of the open and unmatched items of the account is equal to zero.
  - o Total amount of the open and unmatched items of the account in a specific coverage period is equal to zero.

As a result, the accounts with non-zero balance were not considered for automatic offsetting. However, the business requires the ability to enable the automatic offsetting feature even for the accounts with non-zero balance.

To implement this business requirement, the following parameter is newly introduced in the **C1-AUTOM** batch:

- **Skip Auto Maintenance Criteria** – Used to indicate that the zero balance criteria should be skipped and the system should consider all the accounts with zero as well as non-zero balance where the **Skip Auto Maintenance** field is set to **N**. The valid values are **Y** and **N**. If you do not specify the value for this parameter, by default, it is set to **N**.

**Note:** If you set the **Skip Auto Maintenance Criteria** parameter to **Y**, ensure that you specify an offset request type where both the **Bill Line Items Level Offset** and **Transfer Adjustment** options are selected.

Also, one more parameter named **Days from Bill Date** is added in the **C1-AUTOM** batch. It is used to specify the number of days. The system will then consider the bills whose bill date falls between batch business date and batch business date minus the number of days. For example, if the number of days is 30 and batch business date is 01-Nov-2025, then the system will consider all the bills of the account whose bill date falls between 03-Oct-2025 and 01-Nov-2025. This parameter helps to restrict the number of bills being fetched for an account to optimize performance. You must specify a positive integer value for this parameter. Note that you cannot specify a value greater than 180. If you do not specify any value, by default, the parameter value is set to 180.

## Billable Charge Creation or Cancellation through File Upload Interface

Until now, the system enabled you to cancel mass billable charges at once for the fully insured group and individual lines of business through the **File Upload Interface** feature. However, the system did not check whether any bill segment is already created for the billable charge before canceling it. As a result, accounting entries were posted incorrectly for the charges which were already billed to the customers. Therefore, to maintain compliance with the accounting standards, this feature is enhanced to differentiate between cancellation (before freeze) and reversal (after freeze) scenarios and accordingly takes appropriate actions.

Now, the **C1REVIND** characteristic type is enhanced to support the following values:

- **C** – If you want the system to decide whether to cancel or reverse an existing billable charge, you need to set the **C1REVIND** characteristic type to **C** corresponding to the billable charge record in the file. The system then checks whether a billable charge with the specified details already exist in the system. If so, the system then checks whether a bill segment is already generated for the billable charge. If so, the system checks the bill segment status. If the status of the corresponding bill segment is set to **Freezable**, the system does the following:
  - o Deletes the corresponding bill segment.
  - o Cancels the original billable charge.

This ensures that the billable charge is not considered in future billing. However, if the status of the corresponding bill segment is set to **Frozen**, the system does the following:

- o The corresponding bill segment and original billable charge are not canceled.
- o A reversal billable charge is created for the original billable charge.

This reversal charge offsets the previously billed amount, maintaining accounting integrity. And, if a bill segment is not yet generated for the billable charge, the system cancels the original billable charge directly as there are no bill segments.

- **Y** – If you want to cancel an existing billable charge, you need to set the **C1REVIND** characteristic type to **Y** corresponding to the billable charge record in the file. The system then checks whether a billable charge with the specified details already exist in the system. If so, the system cancels the respective billable charge. Note that, in this case, the system does not check whether any bill segment is already generated for the billable charge.

- **N** – If you do not want to cancel an existing billable charge but create a new billable charge for the account, you need to set the **C1REVIND** characteristic type to **N** corresponding to the billable charge record in the file.

**Note:** If you do not specify the **C1REVIND** characteristic type for the billable charge record, the system will create a new billable charge for the account.

## Delinquency Management

The following changes are made to the Delinquency Management feature:

- The **Delinquency Management** feature is enhanced to support individual commercial and Medicare health plans.
- There might be late membership enrollment billing scenarios where the bill date is close to the bill due date. In such scenarios, the business would need the ability to postpone the delinquency process creation process for the respective account till the next month (i.e., till the next bill period). You can now configure the system such that grace start date is moved to the start of next month's bill due date when the number of days between bill date and bill due date is less than or equal to the minimum eligibility days. For example, if the minimum eligibility days is set to 10, bill date is 25-Dec-2025, bill due date is 01-Jan-2026, then the number of days between 25-Dec-2025 and 01-Jan-2026 is 8 which is less than minimum eligibility days (i.e., 10). Therefore, in such scenario, the system creates the delinquency process for the account in the next month and sets the grace start date to the start of next month (i.e., in this case, 01-Feb-2026).
- A new section named **Grace Period Defer Configuration** is introduced while creating or editing a delinquency process type. You can use this section to implement the following scenarios:
  - Late Membership Enrollment Billing
- Until now, the system calculated trigger date for a delinquency event based on the trigger period and wait period configured for the respective delinquency event type. The system supported two trigger periods – **After Grace End Date** and **Before Grace End Date**. Now, in addition, the system supports one more trigger period named **After Grace Start Date**. A new option named **After Grace Start Date** is added in the **Trigger Period** list. For example, if the trigger period is set to **After Grace Start Date**, wait period is set to **Wait Days**, and wait days is set to **10** for a delinquency event type, then the trigger date of the respective delinquency event is set to **Grace Start Date + 10 days**.

- Until now, the system referred a delinquency process type preference to derive the delinquency process type for an account to which an individual membership is billed and accordingly created the delinquency process using the appropriate delinquency process type. Now, if the delinquency process type preference is not specified in the **Delinquency Process Type Field Mapping – Individual** parameter of the **C1-DLNQMNRL** algorithm, the system enables you to derive an effective delinquency process type from the business rule whose criteria is met. The **DLNQMNRL** algorithm retrieves the business rules of the **Delinquency Process Type Derivation Business Rule** category which are effective on the processing date. Note that the system considers only those effective business rules which are in the **Active** status. Once the effective business rules are identified, the system executes these business rules in the order of their priority. If the business rule criteria are met, the system derives an effective delinquency process type for the account and accordingly creates a delinquency process using the derived delinquency process type.
- A new option named **Max of either X Days after Bill Due Date or Paid Through Date** is available in the **Termination Date Rule** list while defining the termination date rule priority in a delinquency process type. Also, a new option named **Max of either X Days after Bill Due Date or Paid Through Date** is available in the **Termination Date Rule** list while defining a delinquency terminate date rule business rule. If the terminate date rule is set to **Max of either X Days after Bill Due Date or Paid Through Date**, the system sets the terminate date to X days after bill due date or paid through date of the account whichever is latest.
- There might be payment return scenarios immediately after the bill due date. To handle such payment return scenarios, the system offers the following two approaches:
  - o If the number of days between the payment return date and grace end date is less than or equal to minimum eligibility days, then create a delinquency process either in the same or next month. If you opt for the same month, the grace start date and grace end date would remain “as is” for an existing delinquency process which is resumed or for the new delinquency process (in case existing delinquency process is not available). However, if you opt for the next month, the grace start date would be set to the start of next month’s bill due date and a new delinquency process would always be created. Note that, in this case, the existing canceled delinquency process is not resumed.
  - o If the payment is returned after the bill due date but before any delinquency event trigger date (hypothetically scenario), the system will create the delinquency process for the account immediately. However, if the payment is returned after the bill due date and after any delinquency event trigger date (hypothetically scenario), the system will create the delinquency process immediately. However, you have the option to decide whether the past event trigger date should be set to the same month or next month. If you opt for the same month, the grace start date and grace end date would remain “as is” for the new delinquency process. However, if you opt for the next month, the grace start date would be set to the start of next month’s bill due date and accordingly all the events would be triggered considering the new grace start date.

- A new field named **Bills Considered for Enter/Exit Criteria** is added in the **Main** section. It has the following values:
  - o **Delinquency Initiated Bill and Bills of Previous Coverage** – Used when you want to cancel a delinquency process if the total unpaid amount or percentage of the bills from the previous coverage and on which the delinquency process was initiated is within the tolerance limit. For example, a delinquency process was created for Feb-2025 bill and later Jan-2025 and Mar-2025 bills were added to the delinquency process. Now, when the total unpaid amount or percentage of Jan-2025 and Feb-2025 bills is within the tolerance limit, then the system will cancel the delinquency process which was initiated for Feb-2025 bill. The system will then create a new delinquency process for the Mar-2025 bill when the **C1-ACDLQ** batch is executed subsequently. Note that the **Delinquency Initiated Bill and Bills of Previous Coverage** option is basically used for the exit criteria. You can also define threshold unpaid amount or percentage of the overdue bills for the past month and for each grace month. The system will allow to cancel the delinquency process only when the tolerance limit set as the exit criteria is met by the overdue bills of the respective period. The system will remove the overdue bills of a period from the delinquency process when they meet the exit criteria of the respective period.
  - o **Bills in Current Grace Period and of Previous Coverages** – Used when you want to define threshold unpaid amount or percentage for each period (i.e., past month, grace month 1, grace month 2, and so on) instead of the overall threshold unpaid amount or percentage (in the **C1-DLNQMNRL** algorithm). The system will then create a delinquency process only when the tolerance limit set as the enter criteria is met by the overdue bills of the respective period. It will then include the overdue bills of a period in the delinquency process when they meet the enter criteria of the respective period.
- A new option named **Enable Threshold Definition** is available while defining or editing a delinquency process type. It indicates whether you want to define threshold for the enter or exit criteria. This option is mandatory when you select the **Bills in Current Grace Period and of Previous Coverages** option from the **Bills Considered for Enter/Exit Criteria** list and optional when you select the **Delinquency Initiated Bill and Bills of Previous Coverage** option from the **Bills Considered for Enter/Exit Criteria** list. However, if you select the **Enable Threshold Definition** option, you need to define the respective unpaid threshold criteria in the newly introduced section named **Unpaid Threshold Configuration**.
- Until now, you were able to define grace period in days. Now, you can define grace period either in days or months. A new field named **Grace Period Type** is added in the **Grace Period Configuration** section. It enables you to indicate whether the grace period given below is in days or months. The system will then accordingly calculate the grace end date. Similarly, a new field named **Grace Period Type** is available while defining a delinquency grace period business rule.

- The system enables you to edit the grace start date and grace end date of a delinquency process. Two new fields named **Grace Start Date** and **Grace End Date** are available while editing a delinquency process. However, the grace start date can be edited only when any event is not triggered for a delinquency process. Note that that grace start date cannot be later than any delinquency event trigger date. Also, note that the grace period is not updated based on updated grace start and end dates. You can edit grace dates only when the delinquency process is in any non-final status.
- Until now, if two or more individual memberships were billed to an account and if the individual membership termination delinquency process was created for the account, the system created termination outbound message for each individual membership even when one of the individual membership met the tolerance limit. This was because the tolerance limit was validated at the account level and not at the individual membership level. Now, the system enables you to create termination outbound message for only those individual memberships of the account that do not meet the tolerance limit (i.e., minimum payment limit). To enable this feature, you need to set the **Bills Considered for Enter/Exit Criteria** field to **Bills in Current Grace Period and of Previous Coverages** and define the threshold limits for the enter and exit criteria. The system will then validate the threshold unpaid amount or percentage of each individual membership for each period and then accordingly initiate termination process for the respective individual membership of the account. Note that the system will skip an individual membership and not create a termination outbound message for it only when the threshold unpaid amount or percentage of each period (i.e., past month, grace month 1, grace month 2, and so on) is met.
- You can set terminate date to grace end date using the existing option named **X Days After Grace End Date** where X days should be set to 0.
- Now, when an individual membership has enrolled for Premium with Hold (PWH) membership benefit, the system will consider the respective account while monitoring delinquency only when either of the following condition is met:
  - o There is another individual membership (for example, for the Dental or Vision coverage) which is billed to the account.
  - o Medical premium is owed for greater than or equal to the number of months specified in the **Medical Premium Owned Period Threshold (in months)** parameter of the **C1-DENPWHLEP** algorithm.

Note that the system considers the medical membership premium charges for monitoring the delinquency of the account when the latter condition is met. To enable this feature, you need to attach an algorithm created using the **C1-DENPWHLEP** algorithm type to the **Additional Creation Criteria** system event in the delinquency process type. This algorithm is invoked when the delinquency is monitored for an account (i.e., in the **C1-DLNQMNRL** algorithm). The system will then validate the above-mentioned additional criteria before creating a delinquency process for an account. If the additional criteria are met, the system will accordingly consider the required bill segments for monitoring the delinquency of the account.

- Now, when an individual membership has enrolled for Late Enrollment Penalty (LEP) membership benefit, the system will consider the respective membership of the account while monitoring delinquency only when one condition from either of the following set is met:
  - o Set I (any one of the below conditions is met)
    - No other premium is billed to the account.
    - If any other membership is billed to the account, then its premium is zero (0).
    - If the other membership is billed for the medical coverage and enrolled for Premium with Hold (PWH), then as a result, the effective premium is zero (0).
  - o Set II (any one of the below conditions is met)
    - Total due amount due to LEP is greater than or equal to the amount specified in the **LEP Charges Owned Amount Threshold** parameter of the **C1-DENPWHLEP** algorithm.
    - Total period for which LEP amount was on due is greater than or equal to the number of months specified in the **LEP Charges Owned Period Threshold (in months)** parameter of the **C1-DENPWHLEP** algorithm.

To enable this feature, you need to attach an algorithm created using the **C1-DENPWHLEP** algorithm type to the **Additional Creation Criteria** system event in the delinquency process type. This algorithm is invoked when the delinquency is monitored for an account (i.e., in the **C1-DLNQMNRL** algorithm). The system will then validate the above-mentioned additional criteria before creating a delinquency process for an account. If the additional criteria are met, the system will accordingly consider the required bill segments for monitoring the delinquency of the account.

- Now, when an individual membership has enrolled for Premium with Hold (PWH) or Late Enrollment Penalty (LEP) membership benefit, the system will cancel an existing delinquency process when either of the following set of conditions are met:
  - o Set 1 (all below conditions are met)
    - The individual membership for the medical coverage has enrolled for Premium with Hold (PWH) and no other individual membership (for example, for Dental or Vision coverage) is billed to the account.
    - Medical premium is owed for less than the number of months specified in the **Medical Premium Owned Period Threshold (in months)** parameter of the **C1-DENPWHLEP** algorithm.
    - PWH benefit is effective for the individual membership from the date which is earlier than or equal to Delinquency Grace Period +1 Day.
  - o Set 2 (all below conditions are met)
    - Total due amount due to LEP is less than the amount specified in the **LEP Charges Owned Amount Threshold** parameter of the **C1-DCNPWHLEP** algorithm.
    - Total period for which LEP amount was due is less than the number of months specified in the **LEP Charges Owned Period Threshold (in months)** parameter of the **C1-DCNPWHLEP** algorithm.

To enable this feature, you need to attach an algorithm created using the **C1-DCNPWHLEP** algorithm type to the **Additional Cancel Criteria** system event in the delinquency process type. This algorithm is then invoked while executing the **C1-DPMON** batch. The system will then validate the above-mentioned additional criteria before canceling a delinquency process of an account. If the additional criteria are met, the system considers the required bill segments for monitoring the delinquency of the account and accordingly cancels the existing delinquency process of the account. The system stamps the cancellation reason on the delinquency process. If the delinquency process is canceled when the Set 1 conditions are met, the system stamps the reason specified in the **Delinquency Process Cancellation Reason due to PWH conditions** parameter of the **C1-DCNPWHLEP** algorithm. However, if the delinquency process is canceled when the Set 2 conditions are met, the system stamps the reason specified in the **Delinquency Process Cancellation Reason due to LEP conditions** parameter of the **C1-DCNPWHLEP** algorithm.

## User Interface (UI) Level Changes

The following table lists changes made to the existing screens in Oracle Revenue Management and Billing:

| Screen Name                                          | Changes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Price Item Relationship                              | <p>The following change is made to this screen:</p> <ul style="list-style-type: none"> <li>The <b>Relation Operator</b> column is added in the <b>Associate Price Items for Relationship Based Pricing</b> zone.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Associate Price Items for Relationship Based Pricing | <p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> <li>The <b>Relationship Type</b> and <b>Relation Operator</b> fields are added in this screen.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Feed Management Dashboard                            | <p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> <li>If you select the <b>Transaction Level Details</b> option from the <b>Search By</b> list, the following additional fields are available in the <b>Search Criteria</b> section - <b>Person Identifier Type</b>, <b>Person Identifier</b>, <b>Person Name</b>, and <b>Hierarchy</b>.</li> <li>If you select the <b>Transaction Level Details</b> option from the <b>Search By</b> list, the following additional columns are available in the <b>Search Results</b> section - <b>Person Name</b>, <b>Person Identifier Type</b>, and <b>Primary Person Identifier</b>.</li> </ul> |
| Approve Price Assignment                             | <p>The following change is made to this screen:</p> <ul style="list-style-type: none"> <li>A new field named <b>Person ID</b> is available when you search using the <b>Person</b> option in the <b>Search</b> zone.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Bill Drill Down Details                              | <p>The following change is made to this screen:</p> <ul style="list-style-type: none"> <li>A new field named <b>Account ID</b> is available when you search using the <b>Bill Details</b> option in the <b>Search Billing Element</b> zone.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Business Rule                                        | <p>The following change is made to this screen:</p> <ul style="list-style-type: none"> <li>A new option named <b>Delinquency Process Type Derivation Business Rule</b> is added in the <b>Search By</b> list.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Business Rule (Used for Adding)                      | <p>The following change is made to this screen:</p> <ul style="list-style-type: none"> <li>A new option named <b>Delinquency Process Type Derivation Business Rule</b> is added in the <b>Business Rule Category</b> list.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                        |

| Screen Name                                           | Changes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|-------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Delinquency Termination Date Rule Business Rule       | <p>The following change is made to this screen:</p> <ul style="list-style-type: none"> <li>A new option named <b>Max of either X Days after Bill Due Date or Paid Through Date</b> is available in the <b>Termination Date Rule</b> list.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Delinquency Process Type (Used for Adding or Editing) | <p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> <li>A new section named <b>Grace Period Defer Configuration</b> is added to this screen.</li> <li>A new option named <b>After Grace Start Date</b> is added in the <b>Trigger Period</b> list.</li> <li>A new option named <b>Max of either X Days after Bill Due Date or Paid Through Date</b> is added in the <b>Termination Date Rule</b> list.</li> <li>Two new fields named <b>Bills Considered for Enter/Exit Criteria</b> and <b>Enable Threshold Definition</b> are added to this screen.</li> <li>A new section named <b>Unpaid Threshold Configuration</b> appears in this screen when the <b>Enable Threshold Definition</b> option is selected.</li> <li>A new field named <b>Grace Period Type</b> is added in the <b>Grace Period Configuration</b> section.</li> </ul> |
| Delinquency Grace Period Business Rule                | <p>The following change is made to this screen:</p> <ul style="list-style-type: none"> <li>A new field named <b>Grace Period Type</b> is added in this screen.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Delinquency Process (Used for Editing)                | <p>The following changes are made to this screen:</p> <ul style="list-style-type: none"> <li>The <b>Grace Start Date</b> and <b>Grace End Date</b> fields are added in the <b>Main</b> section.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Delinquency Process (Used for Viewing)                | <p>The following change is made to this screen:</p> <ul style="list-style-type: none"> <li>The <b>Delinquency Amount</b> column is added in the <b>Bills</b> zone.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Pricing (Person)                                      | <p>The following change is made to this screen:</p> <ul style="list-style-type: none"> <li>The <b>Add</b> button is added in the <b>Effective Price Assignments for Person</b> zone.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Pricing (Account)                                     | <p>The following change is made to this screen:</p> <ul style="list-style-type: none"> <li>The <b>Add</b> button is added in the <b>Effective Price Assignments for Account</b> zone.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Price List Price Item Pricing                         | <p>The following change is made to this screen:</p> <ul style="list-style-type: none"> <li>The <b>Add</b> button is added in the <b>Price List Price Items</b> zone.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

| Screen Name                       | Changes                                                                                                                                                                                                                                                                                                                                                                                          |
|-----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Deal Information                  | The following change is made to this screen: <ul style="list-style-type: none"><li>• The <b>Win Probability</b> column is added in the <b>Deal Financial Summary</b> section.</li></ul>                                                                                                                                                                                                          |
| Pricing and Commitments           | The following change is made to this screen: <ul style="list-style-type: none"><li>• The <b>Win Probability</b> column is added in the <b>Pricing and Commitments</b> section.</li></ul>                                                                                                                                                                                                         |
| Bill Correction (Used for Adding) | The following changes are made to this screen: <ul style="list-style-type: none"><li>• The <b>Entity Level</b> column is added to the <b>Correction Entities</b> section.</li><li>• The <b>Effective Date</b> field is enabled for editing.</li><li>• Three options are added to the <b>Action Flag</b> list – <b>Cancel</b>, <b>Override to Customer</b>, <b>Override to Account</b>.</li></ul> |
| Diagnostic Central                | The following changes are made to this screen: <ul style="list-style-type: none"><li>• The <b>Person Identifier Type</b> and <b>Person Identifier</b> fields are newly added to the <b>Search Anomaly</b> zone.</li></ul>                                                                                                                                                                        |

## Database Level Changes

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This section highlights the documents that you can refer for the following database level changes:

- [New Objects in the ORMB V8.1.0.0.0 Database](#)
- [New Objects in the OUAF V25.4 Database](#)
- [New Tables in the ORMB V8.1.0.0.0 Database](#)
- [New Tables in the OUAF V25.4 Database](#)
- [Existing Tables Modified in ORMB V8.1.0.0.0](#)
- [Existing Tables Modified in OUAF V25.4](#)
- [Algorithms and Algorithm Types Dropped in ORMB V8.1.0.0.0](#)
- [Algorithms and Algorithm Types Dropped in OUAF V25.4](#)
- [Parameters Added or Removed from Algorithm Types in ORMB V8.1.0.0.0](#)
- [Option Types Added or Removed from Feature Configurations in ORMB V8.1.0.0.0](#)
- [Characteristic Types Dropped in ORMB V8.1.0.0.0](#)
- [Batch Controls Dropped in ORMB V8.1.0.0.0](#)
- [Parameters Added or Removed from Batch Controls in ORMB V8.1.0.0.0](#)
- [Parameters Added or Removed from Batch Controls in OUAF V25.4](#)
- [Default User Group Application Services](#)

### New Objects in the ORMB V8.1.0.0.0 Database

To view the list of objects (such as tables, columns, algorithm types, business objects, and so on) which are newly introduced in Oracle Revenue Management and Billing Version 8.1.0.0.0, see the **Appendix A: New Objects in the Oracle Revenue Management and Billing V8.1.0.0.0 Database** in the *Oracle Revenue Management and Billing Database Administrator's Guide*.

### New Objects in the OUAF V25.4 Database

To view the list of objects (such as tables, columns, algorithm types, business objects, and so on) which are newly introduced in Oracle Utilities Application Framework Version 25.4, see the **Appendix D: New Objects in the Oracle Utilities Application Framework V25.4 Database** in the *Oracle Revenue Management and Billing Database Administrator's Guide*.

### New Tables in the ORMB V8.1.0.0.0 Database

To view detail information about the tables that are newly introduced in Oracle Revenue Management and Billing Version 8.1.0.0.0, see the **Appendix C: New Tables Added in ORMB Version 8.1.0.0.0** in the *Oracle Revenue Management and Billing Upgrade Guide*.

## New Tables in the OUAF V25.4 Database

To view detail information about the tables that are newly introduced in Oracle Utilities Application Framework Version 25.4, see the **Appendix M: New Tables Added in OUAF Version 25.4** in the *Oracle Revenue Management and Billing Upgrade Guide*.

## Existing Tables Modified in ORMB V8.1.0.0.0

To view the columns that are newly added, modified, or dropped from the existing tables in Oracle Revenue Management and Billing Version 8.1.0.0.0, see the **Appendix D: Existing Tables Modified in ORMB Version 8.1.0.0.0** in the *Oracle Revenue Management and Billing Upgrade Guide*.

## Existing Tables Modified in OUAF V25.4

To view the columns that are newly added, modified, or dropped from the existing tables in Oracle Utilities Application Framework Version 25.4, see the **Appendix N: Existing Tables Modified in OUAF Version 25.4** in the *Oracle Revenue Management and Billing Upgrade Guide*.

## Algorithms and Algorithm Types Dropped in ORMB V8.1.0.0.0

To view the algorithms and algorithm types which are dropped in Oracle Revenue Management and Billing Version 8.1.0.0.0, see the **Appendix E: Algorithms and Algorithm Types Dropped in ORMB Version 8.1.0.0.0** in the *Oracle Revenue Management and Billing Upgrade Guide*.

## Algorithms and Algorithm Types Dropped in OUAF V25.4

To view the algorithms and algorithm types which are dropped in Oracle Utilities Application Framework Version 25.4, see the **Appendix O: Algorithms and Algorithm Types Dropped in OUAF Version 25.4** in the *Oracle Revenue Management and Billing Upgrade Guide*.

## Parameters Added or Removed from Algorithm Types in ORMB V8.1.0.0.0

To view the parameters which are newly added or dropped from the existing algorithm types in Oracle Revenue Management and Billing Version 8.1.0.0.0, see the **Appendix F: Parameters Added or Removed from Algorithm Types in ORMB Version 8.1.0.0.0** in the *Oracle Revenue Management and Billing Upgrade Guide*.

## Option Types Added or Removed from Feature Configurations in ORMB V8.1.0.0.0

To view the option types which are newly added or dropped from the existing feature configurations in Oracle Revenue Management and Billing Version 8.1.0.0.0, see the **Appendix G: Option Types Added or Removed from Feature Configurations in ORMB Version 8.1.0.0.0** in the *Oracle Revenue Management and Billing Upgrade Guide*.

## Characteristic Types Dropped in ORMB V8.1.0.0.0

To view the characteristic types which are dropped in Oracle Revenue Management and Billing Version 8.1.0.0.0, see the **Appendix H: Characteristic Types Dropped in ORMB Version 8.1.0.0.0** in the *Oracle Revenue Management and Billing Upgrade Guide*.

## Batch Controls Dropped in ORMB V8.1.0.0.0

To view the batch controls which are dropped in Oracle Revenue Management and Billing Version 8.1.0.0.0, see the **Appendix I: Batch Controls Dropped in ORMB Version 8.1.0.0.0** in the *Oracle Revenue Management and Billing Upgrade Guide*.

## Parameters Added or Removed from Batch Controls in ORMB V8.1.0.0.0

To view the parameters which are newly added or dropped from the existing batch controls in Oracle Revenue Management and Billing Version 8.1.0.0.0, see the **Appendix J: Parameters Added or Removed from Batch Controls in ORMB Version 8.1.0.0.0** in the *Oracle Revenue Management and Billing Upgrade Guide*.

## Parameters Added or Removed from Batch Controls in OUAF V25.4

To view the parameters which are newly added or dropped from the existing batch controls in Oracle Utilities Application Framework Version 25.4, see the **Appendix P: Parameters Added or Removed from Batch Controls in OUAF Version 25.4** in the *Oracle Revenue Management and Billing Upgrade Guide*.

## Default User Group Application Services

Oracle Revenue Management and Billing provides the following default user groups - ALL\_SERVICES, C1\_BSERVICES, HCADMIN, and INADMIN. To view the application services configured for the default user groups, see the **Appendix B: Application Services Configured for Default User Group** in the *Oracle Revenue Management and Billing Database Administrator's Guide*.

## Technical Recommendations

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To improve the overall batch performance on the Windows and Linux platforms, we recommend you to make changes in the following files:

| File Name            | Change From                                        | Change To                                          |
|----------------------|----------------------------------------------------|----------------------------------------------------|
| hibernate.properties | hibernate.c3p0.timeout = 300                       | hibernate.c3p0.timeout = 600                       |
| threadpoolworker.sh  | MEM_ARGS="-Xms512m -Xmx1024m -XX:MaxPermSize=768m" | MEM_ARGS="-Xms512m -Xmx4096m -XX:MaxPermSize=768m" |

# Oracle Utilities Application Framework Version 25.4 Enhancements

The following enhancements are made in Oracle Utilities Application Framework (OUAF) Version 25.4:

- [Data Privacy and Security Enhancements](#)
- [Product Usability Enhancements](#)
- [To Do Management and Processing Enhancements](#)
- [Batch Processing Enhancements](#)
- [Implementation Tool Enhancements](#)
- [Integration Enhancements](#)
- [Content Migration Assistant \(CMA\) Enhancements](#)
- [Web Services Enhancements](#)
- [User Interface Experience Enhancements](#)
- [Miscellaneous Enhancements](#)

**Note:** The Steps to Enable, Tips and Considerations, Key Resources, and Role Information sections provide guidelines for enabling each feature, wherever applicable.

## Data Privacy and Security Enhancements

This section describes the new and enhanced data privacy and security feature introduced in this release:

- [UI Masking for Numbers](#)

### UI Masking for Numbers

The system is enhanced to support masking numeric values on the user interface. This is useful if your implementation has certain quantities or amounts that are sensitive and should only be available unmasked to certain users.

The system provides a new masking algorithm type (**F1-MASKNBR**) for number masking. The following functionality is provided by this algorithm type:

- It uses the number 9 as its masking character.
- Like the existing string masking algorithm type, this new algorithm type includes configuration for an application service, security type, and authorization level allowing you to configure security for users that are allowed to see the data unmasked.
- For users that do not have the security to see data unmasked, the algorithm type returns a static number of 9s to mask both the digits themselves and the number of digits. See the algorithm type description for more information.

Masking for alphanumeric data, such as credit card numbers, bank account numbers, and personal identification numbers (for example, social security number) was already supported.

This does not impact any existing extensions.

### Steps To Enable

To enable this feature, see the **User Interface Masking** section in the *Oracle Utilities Application Framework Administrative Guide* for more information.

### Tips and Considerations

The Data Masking plug-in spot was also enhanced to receive the **Field Name** as optional input to the algorithm.

## Product Usability Enhancements

This section describes the new and enhanced product usability features introduced in this release:

- [Additional Inbound Web Service Query Options](#)
- [Batch Job Submission Query Portal](#)
- [Enter Menu Name in Search Without Slash](#)
- [Improvements to Batch Analytics Snapshot Update Processes](#)
- [New Batch Analytics Views](#)
- [Zone SQL and UI Map HTML Editor Improvements](#)
- [Ability to Override Labels in Business Object Configuration](#)
- [Terminology Change: "Sidebar" Replacing "Dashboard"](#)
- [Easier Access to Release Notes](#)
- [Master Configuration Improvements](#)
- [Override a Row Header Using UI Hints](#)

### Additional Inbound Web Service Query Options

You can search for REST Inbound Web Services by operation information and help text details.

In addition, the Open API spec may also be launched from the **Inbound Web Service Operation** portal for your convenience.

This provides more flexible search options. There is no impact to existing extensions with this enhancement.

### Steps To Enable

No steps are required to enable this feature.

## Batch Job Submission Query Portal

The **Batch Job Submission** search page has been converted to a portal to provide you with a more flexible user experience. The portal includes additional filters to allow more granularity in the search. The search also supports pagination, providing the ability to navigate between sets of search results.

This provides you with more search criteria and additional information in the search results. There is no impact to existing extensions with this enhancement.

### Steps To Enable

No steps are required to enable this feature.

## Enter Menu Name in Search Without Slash

The search widget no longer requires a preceding slash to search for a menu item.

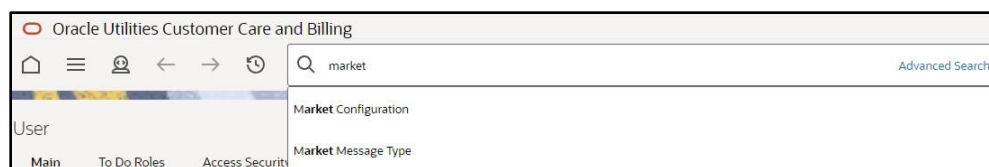


Figure 1: Search Widget

If the keyword for the menu name matches keywords in the unified search results, you will see results mixed in. In this example, the word "market" includes results with "market" in the menu name and "market" in a customer's name or address.



Figure 2: Searching with Keywords

When you enter a slash before the menu item text, it is a signal to the search to only search for the text in menu entries.

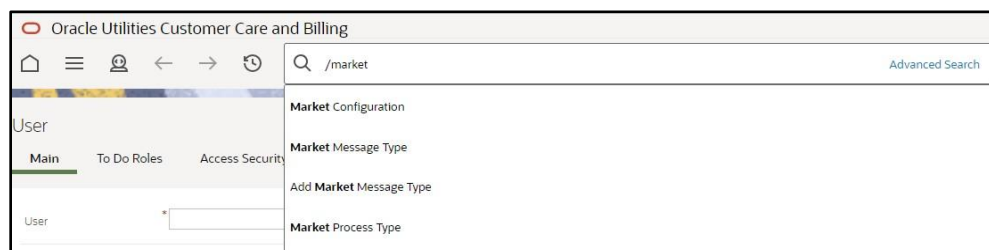


Figure 3: Searching for Menu Item

When using the Search widget, no longer requiring the slash improves usability and consistency.

### Steps To Enable

No steps are required to enable this feature.

## Improvements to Batch Analytics Snapshot Update Processes

Based on volume testing, the queries used to select records for the batch run and batch thread analytics snapshot tables have been optimized. Additional indexes have been added to the tables to support the amended queries. The batch processes now also support selecting records within a range of days, instead of months, to provide more flexibility in the initial population of the snapshot tables.

The processes used to populate the batch analytics table have been amended to improve performance.

### Steps To Enable

No steps are required to enable this feature.

## New Batch Analytics Views

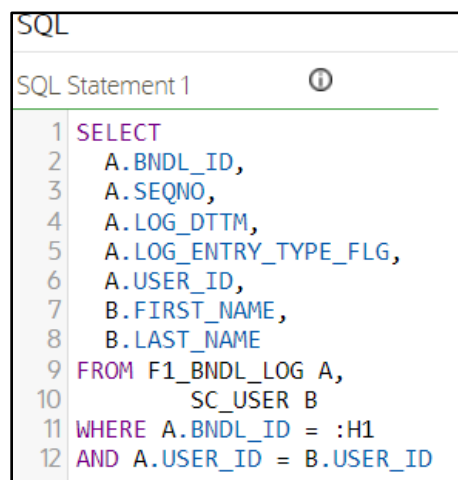
The batch analytics views no longer derive data directly from the various batch run related tables. Instead, the views now reference the snapshot tables, which have been designed to simplify the view SQL and to take advantage of specific indices that are not available in the source data.

### Steps To Enable

No steps are required to enable this feature.

## Zone SQL and UI Map HTML Editor Improvements

The CodeMirror library is now used to apply syntax highlighting logic to the SQL editor in data explorer Zones. Line sequence numbers were also added.

The image shows a screenshot of a web-based SQL editor. At the top, there's a header "SQL" and a sub-header "SQL Statement 1" with an information icon. Below this, the SQL code is displayed with line numbers from 1 to 12 on the left. The code is syntax-highlighted: keywords like SELECT, FROM, WHERE, and AND are in purple; table and column names are in blue. The code is as follows:

```
1 SELECT
2   A.BNDL_ID,
3   A.SEQNO,
4   A.LOG_DTTM,
5   A.LOG_ENTRY_TYPE_FLG,
6   A.USER_ID,
7   B.FIRST_NAME,
8   B.LAST_NAME
9 FROM F1_BNDL_LOG A,
10      SC_USER B
11 WHERE A.BNDL_ID = :H1
12 AND A.USER_ID = B.USER_ID
```

Figure 4: SQL Editor

The same improvements are visible in the HTML Editor for a UI map.

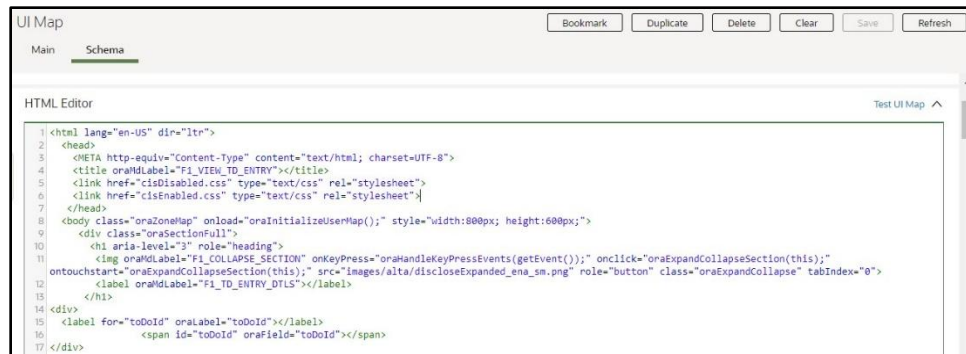


Figure 5: HTML Editor

When viewing or editing the SQL definition in zone maintenance and when viewing or editing the HTML for a UI map, readability is improved with syntax highlighting.

### Steps To Enable

No steps are required to enable this feature.

## Ability to Override Labels in Business Object Configuration

The following language related to a business object status may now be overridden by your implementation:

- Status description. This is the text visible when displaying the current status of a record that is governed by a business object.
- Next Status Action Label for the business object status' next status. This is the text visible on an action button that you may use to transition a record to the next status.

For example, you could change the status "Canceled" for a given business object to use the term "Discarded". You could do this by navigating to the lifecycle definition for that business object and providing an override description for the "Canceled" state. In addition, you can find the states that transition to Canceled and override the Action Label from "Cancel" to "Discard".

The description of any product-delivered business object Status Reason can now also be overridden by your implementation.

**Note:** There are places where a status or a status reason description is captured as an audit of a point in time, such as in a log record. If you change the description of a status on a business object or the description of a status reason, the change will not cascade to any place that has captured the description previously.

This does not impact any existing extensions. The user interface may change if you choose to override descriptions.

### Steps To Enable

No steps are required to enable this feature.

## Tips and Considerations

The product delivers two new views:

- **F1\_BUS\_OBJ\_STATUS\_VW** - This view is built from the data in **F1\_BUS\_OBJ\_STATUS\_L**, but it sets the value of the **DESCR** field to the new override description if populated (otherwise to the description).
- **F1\_BUS\_OBJ\_STATUS\_RSN\_VW** - This view is built from the data in **F1\_BUS\_OBJ\_STATUS\_RSN\_L**, but it sets the value of the **DESCR** field to the new override description if populated (otherwise to the description).

If you have any custom zones that retrieve the **DESCR** field from **F1\_BUS\_OBJ\_STATUS\_L** or from **F1\_BUS\_OBJ\_STATUS\_RSN\_L** and you plan to override any business object status description or a status reason description, you should update your custom zone to use the corresponding view instead.

## Terminology Change: "Sidebar" Replacing "Dashboard"

The vertical area that stays anchored in the application as a user moves through the system is now referred to as a "Sidebar" instead of a "Dashboard." This change is reflected in documentation, metadata descriptions, and configuration on the User page related to the area (including the Sidebar Width, the Sidebar Location and the Sidebar State). This does not impact any extensions.

This allows the "Sidebar" to be distinguished from other "Dashboards" used to describe portals that display high-level views of a specific subject area. For example, the **Batch Day Dashboard** and the **To Do Dashboard**.

### Steps To Enable

No steps are required to enable this feature.

## Easier Access to Release Notes

The **Help** drop down menu was enhanced to include a Release Notes entry. For cloud implementations, the link brings you to the **Cloud Readiness/What's New** portal for the appropriate product and version. For an on-premise implementation, the link brings you to the **Release Notes** page for the appropriate product and version.

You now have a link to quickly access the information about the new features for the current version of the product.

This does not impact any existing extensions.

### Steps To Enable

System administrators should set/grant users/grant access to the **F1-RELNOTE** application service, Inquire access mode.

## Master Configuration Improvements

The master configuration functionality is enhanced to support multiple records for the same business object. You can use an optional new primary Part Name field to uniquely identify the record. Note that the master configuration business object needs to be designed to support multiple parts as indicated by a designated business object option. By default, the part name is not populated for the main record, which allows additional parts to have a unique value as needed.

Due to a growing number of master configuration records, the master configuration UI has become a standard maintenance portal with a separate query portal. This allows for a better user experience when searching for records and allows different business objects to have their own portals as needed.

Additionally, the master configuration maintenance object is enhanced to support the following new features:

- An optional configuration class that may be used at design time to highlight the broader purpose of certain configurations for reporting purposes.
- A Standard characteristics table for extension purposes.

### Steps To Enable

No steps are required to enable this feature.

### Tips and Considerations

Upgrade scripts ensure that users with Read access to the existing application service will have access to the new application service associated with the new portal. The table below lists the existing and new application services.

| Object                            | New Application Service | Access Added to any User Groups with this Application Service/Read Access |
|-----------------------------------|-------------------------|---------------------------------------------------------------------------|
| Master Configuration Query Portal | F1MSTQRY                | F1MSTCFG                                                                  |

Any business object that supports an **Edit** action should include a standard **Record Actions** section as part of its display map. Prior to this release, if a business object did not include such a section, it could still be edited via the old portal. The new standardized maintenance portal requires the section to exist. You should correct these custom business objects accordingly. Until these custom business objects are fixed, you may include the **Master Configuration Actions (F1MFGACT)** zone to the **Master Configuration** maintenance portal.

## Override a Row Header Using UI Hints

A new Row Header attribute has been added to the schema definition to allow one or more elements to be explicitly marked as row headers. Previously, the system automatically assigned the attribute `scope="row"` to the PK field for a list or to the first non-suppressed element. This was not always the element that best identified the row. For example, a sequence number would have been less meaningful than the description of the next element in the list, such as a parameter name.

**Note:** This attribute is only applicable to elements in a list.

This improves the experience for users using a screen reader.

### Steps To Enable

No steps are required to enable this feature.

## To Do Management and Processing Enhancements

This section describes the following new and enhanced To Do features introduced in this release:

- [To Do Entry Lifecycle Improvements](#)
- [To Do Entry Supports Both Creation Process and Routing Process](#)
- [Duration Information Added to To Do Portal and Information String](#)
- [Related To Do Support Improvements](#)
- [Improved Display on Filters on To Do Dashboard Portal](#)
- [Standardize Providing Comments on Various To Do Dialogues](#)

### To Do Entry Lifecycle Improvements

Several improvements were made to the To Do Entry lifecycle to more accurately reflect the status of a To Do Entry:

- The status **Being Worked On** was renamed to **Assigned** to reflect what actually happens in that status. Previously, you could have one or more To Do Entries in the **Being Worked On** state, but it did not mean that work was being performed yet. Now this status reflects only that the work has been assigned to someone.
- A new status value of **In Progress** was added. This allows you to explicitly mark which To Do Entry you are actually working on. You can only have one To Do Entry in the **In Progress** state at a time.
- A new status value of **On Hold** was added. This allows you to pause the progress of a To Do Entry if you need to wait for some event to occur before continuing to work on a To Do. Putting a To Do in the **On Hold** status allows for a more accurate accounting of how long it takes to work on a To Do Entry.

The two new status values of **In Progress** and **On Hold** are captured in a new Substatus field (TD\_SUB\_STATUS\_FLG) on the To Do Entry. This new field can only be populated if the To Do Entry is in the **Assigned** status (the status formerly known as **Being Worked On**). This was done so that any implementation with the existing status field (ENTRY\_STATUS\_FLG) will continue to work as before.

An implementation needs to opt into using the substatus functionality by giving users that work on To Do Entries access to the new access modes. See the release readiness detail below for directions. Once an implementation has opted into the functionality, you will see these additional capabilities related to To Do Entries:

- When you perform any action that previously automatically assigned a To Do to you, it now also moves the To Do entry to **In Progress**. This happens if you click the **Work** action on To Do Entry, To Do Management, or on the **To Do Details** tab of the To Do Dashboard. Additionally, if you use To Do List and click the hyperlink in the **Message** column, this functionality applies.
- When you log into the system and have a To Do Entry that is **In Progress**, it is shown in the **Current To Do** dashboard zone.

- If you have an **In Progress** To Do and perform an action that causes a different To Do Entry to become In Progress, the previous To Do Entry is moved to the **On Hold** status.
- When you view an **Open** To Do Entry on the **To Do Entry Maintenance** page or **Current To Do** zone and you are allowed to work on the To Do, you see a button for **Start Progress**. This allows you to assign it to yourself and start work on in.
- When you view an **Assigned** To Do Entry on the **To Do Entry Maintenance** page or in the **Current To Do** zone, you also see a button for **Start Progress**.
- When you view an **In Progress** To Do Entry on the **To Do Entry Maintenance** page, you see buttons for **Hold Progress** and **Stop Work**. If you click **Stop Work**, it resets the **In Progress** state and the To Do will just be **Assigned**. These buttons are also available in the **Current To Do** zone. You can also perform any action that you can do in the **Assigned** state, including reopen, unassign, forward, and **Complete** the To Do.
- When you view an **On Hold** To Do Entry on the **To Do Entry Maintenance** page, you see buttons for **Start Progress** and **Stop Work**. You can also perform any action that you can do in the Assigned state, including reopen, unassign, forward, and **Complete** the To Do.

The To Do log has been enhanced to capture the status of the To Do Entry at the time the log is created as follows:

- A new log type **Status Updated** has been added and is used for any changes related to the new states of **In Progress** and **On Hold**. The existing log types of **Assigned**, **Forwarded** and **Sent Back** will continue to be used for those states for backward compatibility purposes.
- Going forward, log entries created will capture the status of the To Do at the time the log was created. Existing log values that predate the upgrade are not updated.
- A single status field is used and be populated with the substatus value of **In Progress** or **On Hold**, if applicable. Otherwise, it is populated with the status value of **Open**, **Assigned**, or **Completed**.

All the places where a To Do status is shown for an existing record, the system will show the substatus of **In Progress** or **On Hold**, if populated, otherwise it will show the **Status** (Open, Assigned or Complete).

The **To Do Dashboard > To Dos by Status** graph has been enhanced to also break out counts by substatus.

### Steps To Enable

Provide the required access before using this feature.

### Tips and Considerations

Regardless of whether an implementation has opted into the functionality, you will see that the additional status values are now available in the filter criteria for Status on the **To Do Management** and **To Do Dashboard > Details** pages. The filters for other pages, including **To Do Search**, **To Do List**, and **Supervisor To Do Assignment** have not changed to include the substatus values in the filter criteria. In addition, any page that shows a bar with counts of Assigned or Open To Do Entries have not changed to include counts by the substatus values.

## Key Resources

See the [Improved To Do States](#) training.

## Access Requirements

System administrators should set/grant users/grant access to the access modes **HDPR** (Hold Progress), **SPWK** (Stop Work) and **STPR** (Start Progress) for the **CILQTDEP** application service. If you choose to use this functionality, the recommendation is that this security is granted to all users that use To Do Entry (or none).

## To Do Entry Supports Both Creation Process and Routing Process

If a To Do Type is configured with a creation process and a routing process, a To Do Entry based on that type now supports both processes. The creation process is stamped for audit purposes and the routing process is stamped so that the To Do Entry is processed the next time the routing process is run. Previously, although the To Do Type supported configuration for both types of processes, the To Do Entry table could only support a relationship to the creation batch process. The routing process functionality was not possible. To Do Entries created by a batch process may also be marked to be routed to an external system, increasing usability.

## Steps To Enable

No steps are required to enable this feature.

## Duration Information Added to To Do Portal and Information String

The system now includes the following calculated duration information on the **To Do Entry** page:

- For a non-complete To Do, the Total Duration from its creation until now.
- For a completed To Do Entry, the Total Duration from its creation until its completion.
- For a To Do Entry that had ever been in the In Progress state, the Time In Progress. If it is currently in the In Progress state, the end duration time is the current date/time.

In addition, the base delivered Information string for a To Do Entry has been updated to include the age for a non-complete To Do and the duration for a completed To Do.

If your implementation uses a To Do information algorithm to override the base delivered information, you will not see any change to your To Do information. This change does not impact any extensions.

When you see the calculated duration information, it helps you understand at a glance how long a To Do entry took to work on and how long before it was completed.

## Steps To Enable

No steps are required to enable this feature.

## Related To Do Support Improvements

The zone that displays related To Do entries on the **To Do Entry** maintenance portal has been enhanced to support actions on the related To Do entries. In addition, the current To Do being maintained is included in the results so that you can perform actions on all To Do entries.

The **Related To Do Entries** zone supports all the actions available on the **To Do Management** portal. You can do mass assignment, mass updates to priority, mass addition of a log entry, and mass completion. In addition, you have access to the **Work** button to push all the related To Do entries into your Worklist. The actions are only available if a user is allowed to work all the related To Do entries.

On the **To Do Management** zone and the **To Do Details** zone on the **To Do Dashboard** portal, the link for the Related To Dos message now brings you to the **To Do Entry** maintenance portal. Previously, you were brought to the **To Do Search** page where you could do actions only on the To Do entries related to the one in the results.

This does not impact any extensions.

The ability to action one or more related To Dos on the **To Do Entry** maintenance portal provides improved support for managing multiple records.

### Steps To Enable

No steps are required to enable this feature.

## Improved Display on Filters on To Do Dashboard Portal

Prior to this release, the same filters impacting all charts on the **To Do Dashboard** portal were displayed redundantly within each chart zone. As of this release the display of these filters, and the ability to reset them, has been moved to a central zone at the top of the portal.

Displaying filters in a central zone as opposed to being embedded in each chart zone adds clarity about the content being displayed and improves the usability of the portal.

### Steps To Enable

No steps are required to enable this feature.

## Standardize Providing Comments on Various To Do Dialogues

The following dialogues has been enhanced to be consistent with respect to prompting for comments and adding a user log entry when updating or completing one or more to do entries:

- To Do Entry
  - o The **Edit** action includes the ability to add a user log entry. That saves a user from having to click the Log tab and then click **Add User Log Entry**.
  - o If there are related To Dos, the **Complete** action on the related To Do entries zone is enhanced to prompt for a user log entry. If there is only one To Do included in the selection, the prompt also includes comments, showing the current value of the comments. The **Update** action on this zone already prompted for a user log entry and is enhanced to also include comments if only one To Do Entry was chosen.
- To Do Management
  - o The **Complete** action has been enhanced to prompt for a user log entry. If there is only one To Do included in the selection, the prompt also includes comments, showing the current value of the comments.
  - o The **Update** action already prompted for a user log entry and is enhanced to also include comments if only one To Do Entry was chosen.
- Current To Do sidebar zone
  - o The **Complete** action has been enhanced to prompt for comments and user log entry.
  - o The **Complete All** action (applicable when there are related To Do Entries) has been enhanced to prompt for a user log entry.

### Steps To Enable

No steps are required to enable this feature.

## Batch Processing Enhancements

This section describes the following new and enhanced batch processing features introduced in this release:

- [File Integration Type Writing Multiple Files and Flexibility in File Names](#)
- [Log Files for Batch Threads Renamed](#)
- [Support for Database Resource Management for Batch Processes](#)
- [Batch Job Submission Portal](#)
- [Batch Email Includes Environment Information](#)
- [Improved Batch Submission](#)
- [Batch Level of Service Web Service](#)
- [Parameter Validation Algorithm on Batch Control](#)
- [Batch Control Options](#)
- [Batch Control Portal](#)
- [Improved Display of Batch Thread Level Information](#)
- [Batch Level of Service API Includes Supporting Details](#)
- [Batch Submission by Batch Group](#)
- [Batch Thread Strategy by Actual Keys](#)
- [JSON Format Support for Plugin-driven Extract](#)
- [Large File Upload Improvements](#)

### File Integration Type Writing Multiple Files and Flexibility in File Names

Previously, the plugin-driven extract process was enhanced to allow for the Process Records algorithm to return one or more file names to write the data to. In this release, the capability is extended to File Integration Types. The Extract Process algorithm plug-in spot on the file integration record now also supports returning a file name, allowing for records to be written to a file that differs based on business data, such as CIS Division or service provider. The plug-in spot supports indicating a file name for each schema instance if the use case requires some components of a work unit's information to be written to a separate file.

The ability to indicate that one or more open files should be closed is also supported by the Extract Process plug-in spot. This ensures that batch processes do not cause more than 10 files to be open at a given time for a given thread, which saves on memory allocation.

#### Steps To Enable

No steps are required to enable this feature.

## Log Files for Batch Threads Renamed

The batch log files generated for batch threads, which you can download while viewing the results of a batch run on the batch run tree, are produced using the following format:

- (Batch control).(run number).(re-run number).THD(n).(datetime).stdout|stderr

The values of the batch control, run number, re-run number, n for thread number, and datetime are substituted at runtime. The new format aligns with the format for the logs generated at the batch run level ((Batch control).(run number).(re-run number).(datetime).stdout|stderr).

Previously, the format of these file names was the following:

- (Batch control).(datetime).(pid).THD(n).stdout|stderr

### Steps To Enable

No steps are required to enable this feature.

## Support for Database Resource Management for Batch Processes

DB Resource Manager tools may be used to prioritize resource allocation between various groups of batch processes. For example, processes like GDE, CMA, ILM etc., may be associated with a lower resource allocation priority relative to more critical batch processes. To support this capability, certain batch controls can be explicitly associated with a **Resource Group** of three pre-defined priority levels: 10 - High, 20 - Medium, 30 - Low. This definition is made using a new Batch Resource Configuration extendable lookup. The base product does not release values in this extendable lookup, allowing you to set up your own priority references.

When configured, the resource group of a batch control is added as part of the **MODULE** database session variable as follows: <batch control>,R=<resource group> and can be used as a correlation to a consumer group mapping in Oracle Resource Manager.

With this configuration enabled, DBAs can set up rules that parse the MODULE variable to identify the resource group for a batch process and apply prioritization rules accordingly. Since not all batch controls would be associated with a resource groups, default allocation rules should be considered.

**Note:** This enhancement does not include nor enforce the DB resource management configuration. It only allows for such tool to be leveraged by DBAs as needed. Refer to the Oracle Database Resource Manager documentation.

In addition, the batch control query portal is enhanced to filter by and display resource group information.

### Steps To Enable

To enable this feature, complete these steps:

1. DBA configures DB Resource Manager allocation priority rules by resource group, including a default rule for batch controls not associated with a resource group.
2. Enable this functionality using the new Expose Batch Resource Group option in the General System Configuration feature configuration type.
3. Flush all caches.

## Batch Job Submission Portal

The **Batch Job Submission** page has been converted to a portal, leveraging a more flexible user interface metaphor. The portal organizes information in a way that makes it easier to review and enter key details, such as batch job parameters.

In addition, the following user interactions were changed in the portal:

- The **Add** dialog now requires the batch control to be entered via a popup map.
- The **Duplicate and Queue** action is renamed to **Duplicate**.
- A new action of **Rerun** has been introduced. This action has the same behavior as **Duplicate** with the exception that it populates the batch rerun number with the batch number in context. This replaces the current dialog whereby a user must manually enter the batch number to be rerun in the batch rerun number field.
- The action buttons now only appear if the user has "execute" access for the batch control in context and has security access to the "queue" action for the batch job submission application service.
- New searches have been introduced for both the batch control entry, on the add popup, and the batch user on the add, duplicate, and rerun input pages. For batch controls, the results are restricted to batch controls to which the user has access. For users, results are restricted to users who have access to the batch control in context.
- The batch number is now displayed as a link to the batch run tree. This replaces the context menu.
- Several fields have been rearranged to increase the amount of space available for the batch parameters. This includes:
  - o Moving the submission method to the **Record Information** section.
  - o Moving the override and debugging parameters to a collapsed **Additional Run Details** section under **Record Information**. Note that this applies to input windows as well.
  - o Suppressing the submission user field if the batch user and submission user are the same.
  - o Removing the detailed description column from the batch parameters grid and replacing it with a widget that can be clicked to show the detailed description if needed.

This does not impact any extensions.

### Steps To Enable

No steps are required to enable this feature.

### Tips and Considerations

A new business object (BO) for Batch Job Submission and a new Determine BO algorithm linked to the Maintenance Object were introduced. The base BO includes all the user interface behavior designed for the new portal. If your implementation has introduced your own CM business object and CM Determine BO algorithm, you should review your business object's configuration and merge it into the base business object.

Upgrade scripts ensure that users with Read access to the existing application service will have access to the new application service associated with the new portal. The table below lists the existing and new application services.

| Object                      | New Application Service | Access Added to any User Groups with this Application Service/Read Access |
|-----------------------------|-------------------------|---------------------------------------------------------------------------|
| Batch Job Submission Portal | F1BCHJOB                | CILZRBPP                                                                  |

Note that any existing bookmarks for this page will take you to the previous version of the page. You need to take the following actions to move the bookmark to the new page:

1. Click the bookmark. Take note of the Batch Job.
2. Navigate to the **Batch Job Submission** portal page via the menu.
3. Search for and select the Batch Job you noted from your bookmark. This takes you to the new page.
4. Delete the existing bookmark from the **Bookmark** dashboard zone.
5. Click the **Bookmark** page action button to add a bookmark for this record for the new page.

## Batch Email Includes Environment Information

The email sent when a batch job is complete now includes the domain name, if configured for the environment, directly in the email subject.

For example:

Batch Job <ID> Ended <Status> - <Domain Name>

Batch Job F1-MGDIM Ended SUCCESSFULLY - Acceptance Test 1

In a previous release, support for the domain name was added and the batch email was updated to include the domain name in the body of the email. If you were running the same batch job in multiple environments, you needed to open each email to see which environment the message is referred to.

This does not impact any extensions.

### Steps To Enable

No steps are required to enable this feature.

### Tips and Considerations

The domain name is defined in the **Messages** tab of the **Installation Options - Framework** page using the *Domain Name* message type.

## Improved Batch Submission

The following improvements were made to the **Batch Job Submission** portal:

- Security for changes to the batch user:
  - o There are two users associated with submitting a batch process: the user who submits the request and the batch user who controls permissions and auditing during the actual execution of the job. It is not uncommon for implementations to set up generic users with the required batch execution permissions, in which case the batch user and submission user may differ. Before this release, users submitting jobs online had the ability to set the batch user ID to any user. Allowing the batch user to be overridden may cause auditing issues. A new User Override (F1UO) access mode is added to the Batch Job Submission application service (CILZRBPP). Only users who are granted this access mode can override the batch user ID when submitting a batch job.
- Preserving the original user details:
  - o If the submission user has override privileges, they have the ability to retain the original batch user details when duplicating or rerunning a batch job. If the Run as original user checkbox is selected, the batch user, language, and email address from the original batch run will be copied to the new batch job. If not, the user details are defaulted from the submission user.
- Simplified user dialog:
  - o The user interface for submitting a batch job has been simplified to a single form without the intermediate prompt for the batch control.

This does not impact any extensions.

### Steps To Enable

No steps are required to enable this feature.

### Tips and Considerations

Upgrade scripts ensure that users with Add access to the existing Batch Job Submission (CILZRBPP) application service will have access to the new User Override (F1UO) access mode.

You should review user groups that are not allowed to override the batch user at batch job submission and remove their access to the User Override (F1UO) access mode.

## Batch Level of Service Web Service

After you configure Batch Level Of Service on the appropriate Batch Controls, you can use this API to track the Batch Level Of Service for monitoring purposes.

The API supports two operations:

- Returns the Batch Level of Service for a batch control. You can use this to return the full Batch Level of Service information for any batch control.
- Returns the overall Batch Level of Service for each batch control that is currently running that has a Batch Level Of Service configured. You can use this to monitor critical running processes using Batch Level Of Service.

This allows the monitoring tools to use Batch Level Of Service as a monitoring metric.

### Steps To Enable

System administrators should set/grant users/grant access to the access mode F1EX for the CILBTCP application service.

### Tips and Considerations

This API is only applicable if the Batch Level Of Service is configured.

## Parameter Validation Algorithm on Batch Control

Many plugin-driven batch processes include parameters specific to that process. This plugin spot now provides the ability to detect any parameter errors at the batch run level, before any further processing. Previously, there was no way to validate those parameters prior to invoking the select or process records algorithms.

This is a single algorithm plugin spot. For multiple algorithms, the one with the highest sequence is used. The assumption is that algorithms for this spot will use standard error message reporting.

**Note:** The plugin spot is only available to batch processes using the plugin-driven extract, generic, or upload process templates.

## Batch Control Options

In this release users can define options on a Batch Control. These work like options on other objects such as business objects and portals. These options allow the product and your implementation to mark batch controls with additional information.

Options on Batch Control allow the product and implementations to link additional information to a batch control for special processing or for reporting purposes.

### Steps To Enable

No steps are required to enable this feature.

## Tips and Considerations

The product provides a business service (F1-RetrieveBatchOption) to retrieve the options for a given Batch Control and option type. When calling the business service you indicate whether you expect a single option value or if there can be multiple option values.

## Batch Control Portal

The **Batch Control** page has been converted to a portal, leveraging a more flexible and extendable user interface metaphor. The portal organizes information in a way that makes it easier to review the batch control's configuration and includes the following key features:

- Include key information in the Main section and move less important details to designated sections.
- Support description inheritance from an optional reference to a batch template.
- The display and maintenance of batch parameters is enhanced as follows:
  - o Follows the concise summary / details user experience introduced on the Batch Job Submission portal.
  - o Distinguish between general parameters supported by the batch framework and those implemented by the batch control program.
  - o Distinguish between general parameters that are applicable to all batch controls and those that may be depend on certain functionality supported by the batch.
- The display and maintenance of Algorithms follow the user experience introduced on the Business Object portal.
- Level of service information is not always calculated when a record is displayed. Instead it is available on demand using a designated button.
- Display additional information
  - o Selection algorithm if any
  - o Process record algorithm if any
  - o Upload algorithm if any
- A more comprehensive list of references to the batch control.

## Steps To Enable

No steps are required to enable this feature.

## Tips and Considerations

A new business object for Batch Control and a new Determine BO algorithm linked to the Maintenance Object were introduced. The base business object includes all the user interface behavior designed for the new portal. If your implementation has introduced your own CM business object and CM Determine BO algorithm, you should review your business object's configuration and align it with the base business object.

Upgrade scripts ensure that users with Read access to the existing application service will have access to the new application service associated with the new portal. The table below lists the existing and new application services.

| Object               | New Application Service | Access Added to any User Groups with this Application Service/Read Access |
|----------------------|-------------------------|---------------------------------------------------------------------------|
| Batch Control Portal | F1BTCTRL                | CILBTCP                                                                   |

## Improved Display of Batch Thread Level Information

The business service that returns the level of service information for a specific batch control (F1-BatchLevelOfService) is now aligned with the logic of the Health Check business service (F1-HealthCheck). When multiple Level of Service algorithms are plugged in on the batch control, the overall Level of Service code is populated as follows:

In addition, the **Threads** tab has been enhanced to support a Thread Summary action that summarizes instance information per thread.

### Steps To Enable

No steps are required to enable this feature.

## Batch Level of Service API Includes Supporting Details

The **Batch Run** portal has been enhanced to reflect the Accumulate All Instances indication set on the batch control when displaying information at the batch run thread level.

- If any algorithm returns Error, that value is returned.
- Otherwise, if any return a Warning, that value is returned.
- Otherwise, Normal is returned.

The **Reason** is set to "See Results for Details". In addition, the results returned by each algorithm is returned so that the caller can review the details.

This business service is called by the F1-BatchLevelOfService REST inbound web service. Users of this API will now see the additional details.

When calling the Batch Level of Service API, you now can see the supporting details when there are multiple level of service algorithms. In addition, the summarized level of detail output surfaces the most important information.

### Steps To Enable

No steps are required to enable this feature.

## Batch Submission by Batch Group

If multiple batch jobs are submitted for the same batch control, only one job runs at a time; the other jobs wait in the queue. There are some use cases where a batch is submitted from an online transaction to defer heavy processing to batch. If multiple users are performing the same action for different records, the jobs are queued up.

In this release, there is the concept of a **Batch Group** where multiple batch controls may get created for the same purpose and get associated, via an option, to a **Batch Group**. The existing F1SubmitJob "Submit Batch Job" script was enhanced to submit a job for the requested batch control or any of the batch controls associated with it using the **Batch Group** option. If the requested batch control is associated with a batch group, then the batch control with a low number of in progress batch jobs is submitted.

Note that associating a batch control with a batch group should be done with caution. You should ensure that all batch controls in the group can run concurrently without interfering each other.

As part of this enhancement, the **Additional Information** option of the **Batch Control Query** portal was also enhanced to support a search by batch control options.

When applicable, pool-based batch submission supports a more efficient way of delegating user-centric tasks to be performed via batch processes that can run in parallel.

### Steps To Enable

You need to update the logic that submits the batch job to call F1SubmitJob passing the batch group.

## Batch Thread Strategy by Actual Keys

Typically, system generated keys are assigned in such a way that they are evenly distributed across batch threads. This is known as the "Thread Iteration (THDS)" strategy where each thread is assigned a low to high key range that is based solely on the size of the primary key field. There are situations where keys do not evenly distribute across threads, resulting in uneven thread completion times. For example, conversion entities in the staging schema have legacy keys, which are typically not evenly assigned. This impacts the Object Validation and XML resolution batch processes that thread by legacy keys.

In this release, a new variation of the thread distribution strategy "KEYS" was introduced where the low and high IDs for the thread are calculated based on actual keys. The range is calculated based on the total number of records in the table divided by the requested number of threads, such that each thread processes approximately the same number of records.

The new strategy is available to plug-in driven and standard monitor batch processes. These batch programs support a new **Batch Strategy** batch parameter that can be used to override the default strategy. Note that the new strategy can only be used when processing is over a table with a single system generated prime key.

### Steps To Enable

To enable this feature when submitting a monitor batch or a plug-in driven batch, populate the Batch Strategy parameter with the value KEYS.

## JSON Format Support for Plugin-driven Extract

The plugin-driven extract batch job was enhanced to support output formats related to JSON:

In this release, a new variation of the thread distribution strategy 'KEYS' was introduced where the low and high IDs for the thread are calculated based on actual keys. The range is calculated based on the total number of records in the table divided by the requested number of threads, such that each thread processes approximately the same number of records.

- **JSON Document** - You can configure this format to produce either a JSON object, which contains an array of the output records, or simply an array of output records. Whether you extract an object or an array is determined by whether or not you suppress the object Grouping name.
- **JSON Lines** - You can configure this format to produce a series of JSON objects. In this format, each output record is a JSON object.

### Steps To Enable

To enable this feature, see the **Extract Record Processing** topic in the **Background Processes** chapter of the *Oracle Utilities Application Framework Administrative Guide*. Several sections in that topic highlight considerations for using JSON and JSONL format.

## Large File Upload Improvements

Previously, uploading a file using the plugin-driven upload batch process assumed that the content of the entire file was processed as a single unit of work. With this approach, an upload of a large file has often hit various resource limitations and timed out.

As of this release, the following features were introduced to better support large file uploads:

- A new batch control is provided for splitting a large file into multiple smaller files. Refer to batch control F1FSPLIT for more information.
- The existing **File Upload** batch algorithm entity was enhanced to support algorithms designed to process records in smaller units of work than the entire file. Note that the algorithm can still be designed to process all the records in a file as a single unit of work as before.

### Steps To Enable

If you have large files to upload, choose one of the new features to better process the file.

To use the batch job that takes a large file and splits it to smaller files, complete these steps:

1. Create a batch control using the batch template File Split Template (F1FSPLIT).
2. Include this batch in the scheduler prior to the existing upload process you have for uploading the file. The file name parameter for this should be configured with an appropriate GLOB syntax to handle multiple files.

No coding changes are required for this option.

To use the feature where the algorithm can handle chunks of work, coding changes are needed. See the **The File Upload Algorithm** section in the **Uploading Records** topic of the **Background Processes** chapter in the *Oracle Utilities Application Framework Administrative Guide*. With this option the additional batch process to split the file is not needed.

## Implementation Tool Enhancements

This section describes the following new and enhanced implementation features introduced in this release:

- [Business Object Portal](#)
- [Additional Terms Added to SQL Allowlist](#)
- [Business Object Portal Improvements](#)
- [Extended Tree Node Broadcasting Capabilities](#)
- [Extensions Dashboard Improvements](#)
- [Maintenance of Lookup Values Improvements](#)
- [Algorithm Entity Information Portal](#)
- [Client Folder Reorganization](#)
- [Generate API Specification Files for Publication](#)
- [Improved Open API Specification](#)
- [Improved Portal and Business Object Option Configuration](#)
- [Business Service Portal](#)
- [Improvements to the Generate API Specifications Batch](#)
- [Groovy Support for Custom Lookup Values](#)
- [Maintenance Object Portal](#)
- [Script Portal](#)
- [Support Changes to a Widely Referenced Schema in Batch](#)
- [Visibility Script for Zone Header Actions](#)
- [Ability to Restrict Behavior for the Live Production Environment](#)
- [Custom Cascading Style Sheet Support Managed Content Definition](#)
- [Email Sender Support Defining 'From' Address](#)
- [Personal Identifiable Information Redaction in Logs](#)
- [Products Use Metrics](#)
- [Use Export Filename as Worklist Description](#)
- [Data Area Portal](#)
- [Data Correction Self-Service - Support for Orphan Record Deletion](#)
- [Feature Configuration Portal](#)

- [UI Map Portal](#)
- [Allowlist for Sending Files as Email Attachments](#)

## Business Object Portal

The **Business Object** page has been converted to a portal, leveraging a more flexible and extendable user interface metaphor. The portal organizes information in a way that makes it easier to review and understand the configuration that controls business object related functionality.

In addition, the following implementation tasks were simplified by updates in this release:

- When adding a new business object, the schema is automatically generated, along with key UI configuration scripts as needed.
- If the new business object is a subclass of an existing business object, the schema is generated accordingly.
- Introducing a new business object algorithm: This action was available as a context sensitive zone and is now incorporated into the appropriate sections of the portal.
- Deactivating and activating a base product algorithm: This is now a simple action on the algorithms sections of the portal.
- Filtering for algorithms by system event.
- Filtering for options by option type.

### Steps To Enable

No steps are required to enable this feature.

## Additional Terms Added to SQL Allowlist

The following terms were added to the SQL Allowlist:

- CHR
- COALESCE
- LAG
- NEXT\_DAY
- REGEXP\_INSTR
- REGEXP\_REPLACE
- REGEXP\_SUBSTR
- REVERSE
- RPAD
- RTRIM
- TO\_NUMBER
- XMLQUERY

Note that the terms were also added to the allowlist in previous releases via patches. This does not impact any extensions.

Additional terms included in SQL allowlist provides implementations with more capabilities when writing SQL statements in data explorers.

### Steps To Enable

No steps are required to enable this feature.

## Business Object Portal Improvements

Business object option types and algorithms system events are now documented in designated extendable lookups, **Option Configuration** for option types and **Algorithm Entity Type** for system events. It is noted whether they support single or multiple values. This configuration is for documentation purposes only. Previously, there was no indication as to whether a business object's option type or algorithm system event implemented a single value or supported multiple values.

Using this information, the **Business Object** portal uses an icon to highlight whether a single value option type or algorithm system event record has been overridden by a higher sequence record. The situation may occur when the business object's option or system event configuration is extended by other products or customers. In the same way, an icon is used to highlight that a business object algorithm has been inactivated. The use of these icons makes it easier to focus on configuration records that are in effect and active.

The detailed description of the option types is presented in a more user friendly and searchable way. Also, as of this release, you can maintain reasons for a specific status directly on the **Lifecycle** tab where you review and maintain all other status-related configurations.

This does not impact any extensions.

### Steps To Enable

No steps are required to enable this feature.

### Tips and Considerations

If you have introduced custom business object-related option types, it is recommended that you also define them in the Option Configuration extendable lookup to indicate whether the option type assumes a single value or multiple values. By default, the **Business Object** portal displays an option type that is not defined in the extendable as if it supports a single value.

In the same way, if you have introduced custom business object related system events, it is recommended that you also define them in the Algorithm Entity Type extendable lookup to indicate whether the system event assumes a single algorithm or multiple algorithms. By default, the **Business Object** portal displays a system event that is not defined in the extendable as if it supports multiple algorithms.

## Extended Tree Node Broadcasting Capabilities

The Populate Node and Override Information tree node algorithms can now optionally set the broadcast fields to use. When this information is not provided, the default primary key field names are used. Previously, when a user clicked on the broadcast icon on a tree node, the broadcasted field names were hardcoded to the node entity's primary key field names. While this was appropriate for most entities, there were use cases where the broadcasted field names should have differed from key names.

In addition, these tree node algorithms can now also determine that for a specific node the broadcast icon is not applicable and therefore should not be displayed. The tree node definition must explicitly allow broadcasting for the icon to appear and the algorithm can only set it to not appear as needed for a specific node.

This does not impact any extensions.

This allows for better support of complex tree node broadcasting requirements and provides more flexible interaction with trees.

### Steps To Enable

No steps are required to enable this feature.

## Extensions Dashboard Improvements

The **Extensions Dashboard** portal was enhanced to show all revisions made to an extension entity in descending order in a new **Revision Control** zone. A **Configuration Migration** zone was also added to also list all Content Migration Assistant migration objects that applied changes to an extension entity. These zones appear only when an extension entity is selected.

A new **Review** tab was added to the **Extensions Dashboard** portal to highlight rare duplicate configuration issues that may arise after an upgrade. Utilities can use this information to adjust their configuration.

This does not impact any extensions.

The new user experience allows utilities and partners to improve the way they track and manage their extensions, which helps to reduce implementation costs.

### Steps To Enable

No steps are required to enable this feature.

## Maintenance of Lookup Values Improvements

Lookup values can be easily filtered by various criteria and a smaller set of records can be selected for update. This helps handle lookup fields, like algorithm entity, that have too many values to manage as a single list. This does not impact any extensions.

This improved user experience helps to reduce implementation costs.

### Steps To Enable

No steps are required to enable this feature.

## Algorithm Entity Information Portal

A new **Algorithm Entity** query and display portal is available. You can use the query portal to look for a specific algorithm entity (also referred to as a plug-in spot). In case you want to research more than one plug-in spot, the results include a worklist icon to put results in a worklist.

Once you select an entry, you are brought to a display portal where you can review information about the algorithm entity. You can use the View Plug-in Spot API link to see the hard parameters passed into algorithms for this plug-in spot. You can read the detailed description, if provided, to understand more information about how or when algorithms are called and their responsibility.

If there are any algorithm types for the plug-in spot, they are listed in a separate zone. If applicable, you can drill into the algorithm type or its script. It includes the parameters and the number of algorithms for the algorithm type.

This does not impact any extensions.

### Steps To Enable

System administrators should set/grant users/grant access to the following application services:

- **F1ALGENQ** - Algorithm Entity Query Portal
- **F1ALGENT** - Algorithm Entity Portal

## Client Folder Reorganization

The new folder structure does the following:

- The JavaScript files are being located in more "functional" folders, so they are easier to find, fix, and test.
- These "functional" folders are easier to bundle. Oracle Utilities Application Framework bundles JavaScript files to help performance.
- Oracle Utilities Application Framework includes some external "library" JavaScript, for example, OJet and JQuery. The library files have been relocated to make it easier to identify they are library files.

Reorganizing the folder structure makes it easier for you to locate folders, which results in faster development and bug fixes. In the future, this structure will make it easier to adopt other common development tools.

**Note:** This enhancement only impact extensions using custom UI Maps or old style custom JSP based pages that hardcode library locations. These pages must refer to the new locations to operate as before.

### Steps To Enable

No steps are required to enable this feature.

### Tips and Considerations

All the Oracle Utilities Application Framework references have been updated as necessary. If a UI Map has been developed that manually references a library file, it will need to be updated.

- Use the Oracle Utilities Application Framework-provided UI Map include - F1- OJETLIBS or F1- OJETLIBSR (Recommended).
- Update your UI Map to refer to the new library location. Since the library folder structure still contains the version number, you need to update it for each release.

## Generate API Specification Files for Publication

Prior to this release, the publication process of product APIs involved a manual online step of downloading the OpenAPI Specification file for each web service and adjusting its content for external publication.

A new batch process, **F1-APIEX**, is now provided to simplify this task and generate a publication-ready specification file for each web service included in a web service category. This batch process is only applicable to anyone responsible for extracting API documentation.

This does not impact any extensions.

### Steps To Enable

System administrators should set/grant users/grant access to the **F1-APIEX** application service.

## Improved Open API Specification

The following details are included in the Open API specification for a web service:

- Request and response examples. These were available as options for a web service operation, but they are only incorporated into the open API specification as part of this release.
- Help text description for URL and query parameters.

This does not impact any extensions.

### Steps To Enable

No steps are required to enable this feature.

## Improved Portal and Business Object Option Configuration

It is simpler for you to set up **Portal and Business Object** options where an option's value is restricted to a set of valid values. A user can choose from a drop-down list of valid values.

The **Option Configuration** extendable lookup is enhanced to support a reference to a lookup field that represents the valid values for the lookup. When specified, the corresponding options maintenance UI provides a drop-down list with the corresponding lookup values and the display UI shows the corresponding lookup value description.

This does not impact any extensions.

### Steps To Enable

No steps are required to enable this feature.

## Business Service Portal

The **Business Service** page has been converted to a portal, leveraging a more flexible and extendable user interface metaphor. The portal organization makes it easier to review the business service's configuration and includes the following key features:

- The schema is generated upon creation of the business service. If the service is based on a data explorer zone, the schema is generated based on the zone configuration, thus streamlining and making it easier to introduce a new data explorer service.
- Navigation to the related zone for data explorer services.
- A more comprehensive list of references to the business service and its schema.
- A less cluttered sidebar by moving all business service tips and schema generation functionality to the new portal.
- Ability to test the service.

**Note:** This requires security access to application service Test a Service (**F1SCRTEST**) in addition to the ability to add a script which is the existing alternative way for testing any service.

There is no impact to existing extensions with this enhancement.

### Steps To Enable

To enable implementers that already have security rights to create scripts to also test their scripts using the new Test action, provide them with access to application service Test a Service (**F1SCRTEST**).

### Tips and Considerations

A new business object (BO) for Business Service and a new Determine BO algorithm linked to the Maintenance Object were introduced. The base BO includes all the user interface behavior designed for the new portal. If your implementation has introduced your own CM business object and CM Determine BO algorithm, you should review your business object's configuration and align it with the base business object.

Upgrade scripts ensure that users with Read access to the existing application service will have access to the new application service associated with the new portal. The table lists the existing and new application services.

| Object                  | New Application Service | Access Added to any User Groups with this Application Service/Read Access |
|-------------------------|-------------------------|---------------------------------------------------------------------------|
| Business Service Portal | F1BUSSVC                | FWLTBSVP                                                                  |

## Improvements to the Generate API Specifications Batch

The **F1-APIEX** batch process no longer requires a web service category. This makes it easier to generate a complete list of specification files for all web services that are ready for publication. When a web service category is specified, the batch processing is restricted as before to those web services included in the specified category.

In addition, the definition of being ready for publication is extended to also include custom web services that are active.

### Steps To Enable

No steps are required to enable this feature.

## Groovy Support for Custom Lookup Values

A new `LookupHelper.getLookupInstance` Java method is provided, which allows programmers to instantiate a lookup object for use in subsequent Groovy code. For example:

```
Lookup customLookup = LookupHelper.getLookupInstance("ALG_ENTITY_FLG", "CMAL");
```

Previously, the product did not support a good method for instantiating a lookup object in a Groovy script when there was no Java class generated for the lookup.

You can instantiate a lookup object in Groovy when referring to a custom lookup value rather than using a variable.

### Steps To Enable

No steps are required to enable this feature.

## Maintenance Object Portal

The **Maintenance Object** page has been converted to a portal, leveraging a more flexible and extendable user interface metaphor. The portal organization makes it easier to review the maintenance object's configuration and includes the following key features:

- The maintenance object's hierarchical table structure is visualized as a tree. Table information is also provided as a list with worklist capability.
- The display and maintenance of Options and Algorithms follow the user experience introduced on the **Business Object** portal.
- The **Relationship** tab describes the data model relationship between this maintenance object and others.

- Additional details like the maintenance object's application service, its primary table's classification, and related portals are displayed.
- A comprehensive list of references to the maintenance object is provided.
- A less cluttered sidebar by removing the zone that shows business object information to a designated tab on the new portal.

There is no impact to existing extensions with this enhancement.

### Steps To Enable

No steps are required to enable this feature.

### Tips and Considerations

A new business object (BO) for Maintenance Object and a new Determine BO algorithm linked to the Maintenance Object were introduced. The base BO includes all the user interface behavior designed for the new portal. If your implementation has introduced your own CM business object and CM Determine BO algorithm, you should review your business object's configuration and align it with the base business object.

Upgrade scripts ensure that users with Read access to the existing application service will have access to the new application service associated with the new portal. The table lists the existing and new application services.

| Object                    | New Application Service | Access Added to any User Groups with this Application Service/Read Access |
|---------------------------|-------------------------|---------------------------------------------------------------------------|
| Maintenance Object Portal | F1MO                    | CILEMOBP                                                                  |

### Script Portal

The **Script** page has been converted to a portal, leveraging a more flexible and extendable user interface metaphor. The portal organization makes it easier to review the script's configuration and includes the following key features:

- Navigation to the algorithm entity portal for plug-in scripts.
- A more comprehensive list of references to the script and its schema.
- A less cluttered sidebar by moving all script tips to the new portal.
- Ability to view the script as text for a BPA script.
- Ability to view the display and input UI for a script that includes UI hints. This is similar to the actions available for a business object.
- Ability to test a BPA or a Service Script.

**Note:** This requires security access to application service "Test a Service (**F1SCRTEST**)" in addition to the ability to add a script (which is the existing alternative way for testing any service). This should typically be enabled in development and testing environments.

In addition, the script query portal is enhanced with a new **Additional Information** option that supports searching for scripts by schema information. There is no impact to existing extensions with this enhancement.

## Steps To Enable

To enable implementers that already have security rights to create scripts to also test their scripts using the new Test action, provide them with access to application service Test a Service (**F1SCRTEST**).

## Tips and Considerations

A new business object (BO) for Script and a new Determine BO algorithm linked to the Maintenance Object were introduced. The base BO includes all the user interface behavior designed for the new portal. If your implementation has introduced your own CM business object and CM Determine BO algorithm, you should review your business object's configuration and align it with the base business object.

Upgrade scripts ensure that users with Read access to the existing application service will have access to the new application service associated with the new portal. The table lists the existing and new application services.

| Object        | New Application Service | Access Added to any User Groups with this Application Service/Read Access |
|---------------|-------------------------|---------------------------------------------------------------------------|
| Script Portal | F1SCRIPT                | CILZSCRIP                                                                 |

## Support Changes to a Widely Referenced Schema in Batch

Making changes to a schema requires the application to ensure the changes do not violate any schema that references it. The validation process is complex and may time out when the number of references is high. A new batch utility, Update Object Schema (F1-SCMUP), is provided to perform this type of change as a batch process, which allows for higher time limits. The user submitting the change in batch should have the same security permissions needed to perform it online. In addition, submitting the batch requires access to the Update Object Schema (F1-SCHEMAUPD) batch application service.

Supporting a batch utility to make a change to a highly referenced schema assists rare implementation tasks that cannot be completed online.

## Steps To Enable

System administrators should set/grant users/grant access to the Update Object Schema (**F1-SCHEMAUP**) application service.

## Visibility Script for Zone Header Actions

New mnemonics have been added to the Zone Action parameters in base delivered zone types. The mnemonics allow you to reference a visibility script that can check a condition and return an indication of whether or not to show the action. The mnemonics are:

- `vss='scriptName'`
- `vinput=[...]` (values to be passed to the script)
- `voutput=booleanValue`

The following is an example of the zone configuration for a base delivered zone that shows links to view a service script's schema. The visibility script checks the type of script being displayed and returns an output Boolean of 'true' only if the script is a service script.

```
type=LINK action=SCRIPT bpa='F1ScrStepAct' label=SVC_SCR_DA_LBL  
context=[mode='VIEW_SCR_SCHEMA' scriptcd=SCR_CD] vss='F1ScrActVis'  
vinput=[scriptcd=SCR_CD scriptAction='VIEW_SCR_SCHEMA'] voutput=showAction
```

### Steps To Enable

No steps are required to enable this feature.

### Tips and Considerations

In a future release, the product will introduce mnemonics to check a user's security access before displaying a zone header action. This information would get cached as a user's security access does not change during their session. It is recommended to wait for that feature and not to create visibility scripts for checking security. You should use the visibility script to check for conditions that could change based on the data being displayed.

## Ability to Restrict Behavior for the Live Production Environment

In this release a property is introduced (isLiveProduction) to indicate that the environment is the live production environment. By default this value is set to “false”.

An example of functionality that uses this property to determine behavior is [Extensions Dashboard Improvements](#).

This property enables the base product and implementations to implement tighter restrictions or different default behavior for a live production environment as compared to other environments.

### Steps To Enable

To enable this feature, contact your Customer Success Manager to confirm your live production environment to ensure that the property value will be set correctly.

## Custom Cascading Style Sheet Support Managed Content Definition

The product allows implementations to define a custom style sheet using a Feature Configuration option. In previous releases, the system only supported defining a \*.CSS file and referring to the file location in the option. In this release, the feature option now also allows you to see a Managed Content entry.

Implementing a custom style sheet using managed content allows for implementations to override the cascading style sheet (CSS) using metadata rather than using a CSS file.

### Steps To Enable

To enable this feature, complete these steps:

1. Create a Managed Content entry using the **CSS Definitions** managed content type and use this entry to define your custom style sheet definition.
2. Go to the Feature Configuration for the **Custom Look and Feel** feature type. You may need to create one if it does not exist. Use the Style Sheet option to reference the managed content entry.

## Email Sender Support Defining 'From' Address

When an email is initiated from within the system using the business service F1- EmailService, the 'from' email address is a parameter that may be populated by the calling program. In this release, the Message Sender has been enhanced to support defining the "from" email address when defining an Email sender using the context type "SMTP From Address". If the call to the business service refers to a sender directly or relies on the default sender (defined on the Message Option) and the 'from' context type is populated, this value is used. Otherwise the value passed into the business service is used.

Note that your specific application may already have some configuration for determining the "From" email address of a given email use case, for example in Feature Configuration. If those values satisfy your implementation's use cases, then no changes are needed.

### Steps To Enable

To enable this feature, complete these steps:

1. Navigate to **Message Sender** and find your email sender.
2. In the **Context** tab, add a Context Type for SMTP From Address and populate the desired value.

## Personal Identifiable Information Redaction in Logs

In a previous release, the system introduced redaction rules. Implementations use these rules to identify fields that may contain Personal Identifiable Information for their customer data. In this release, the redaction rules are now used to apply to data being written to debug log files.

By default, the redaction rules are applied. In a production environment, this setting cannot be turned off. However, in a non-production environment, the setting can be turned off using a Feature Configuration.

### Steps To Enable

No steps are required to enable this feature.

### Tips and Considerations

The system uses a property to identify whether an environment is a live production environment or not. For cloud customers, this is set by the development operations team when a customer indicates they are live. For on-premises clients, you should set this property when you are live. See the *Oracle Utilities Application Framework Administrative Guide* for more information.

If you are in a non-production environment and the data getting written to the logs is not real customer information and you would like to turn off the log redaction, you may turn it off by adding a feature option:

1. Go to **Admin Menu > General > Feature Configuration**.
2. Look for an existing Feature Configuration record for the feature type 'General System Configuration'. If one exists, select it. If one does not exist, use the **Add** button in the page action area to add an entry for this feature type.
3. Add an entry in the option type collection for the Option Type "Turn Off Log Redaction" and enter a value of "Y".

Note that only users with the Administrator access mode (F1SU) for the Feature Configuration application service (CILTWSDP) may add this entry.

## Products Use Metrics

In this release, the product delivers two maintenance objects: Product Metric Type and Product Metric Snapshot. The product uses algorithms related to these objects to calculate and capture product use metrics.

In previous releases, the product used entries in the Statistics Control and Statistics Snapshot objects to capture product use metrics, causing these tables to include a mixture of statistics related to your implementation's business processes as well as product use metrics.

Implementations do not need to manage or review the information in the new objects. The **Product Use Metrics** dashboard zones have been updated to display information captured in the Product Metric Snapshot table per the new functionality.

### Steps To Enable

No steps are required to enable this feature.

### Tips and Considerations

If your implementation has statistic control entries related to product metrics, they will remain. The **Product Use Metric** dashboard will no longer use this information with the introduction of the Product Metric Snapshot. Consider marking the records as inactive.

Standard user interface components with associated security are provided for the new objects, but implementations do not need to manage or review the information.

## Use Export Filename as Worklist Description

The **Migration Data Set Export Query** portal has been enhanced to use the data set's file name as the worklist description.

Using the export file name as a more meaningful worklist description makes it easier to work with CMA export data sets.

### Steps To Enable

No steps are required to enable this feature.

## Data Area Portal

The Data Area page has been converted to a portal, leveraging a more flexible and extendable user interface metaphor. The portal organizes information in a way that makes it easier to review the data area's configuration and includes the following key features:

- Better use of the Main tab space to display information concisely. For example, showing the schema in text format for a quick review similar to the business object portal.
- The list of data areas that extend this data area are readily available on the **Main** tab instead of hidden in the **Schema** tab.
- More comprehensive list of references to the data area and its schema.

- View the display and input UI for a data area that includes UI hints. This is similar to the actions available for a script.
- Uncluttering of the sidebar by moving data area tips to the new portal.

### Steps To Enable

No steps are required to enable this feature.

### Tips and Considerations

A new business object (BO) for Data Area and a new Determine BO algorithm linked to the Maintenance Object were introduced. The base BO includes all the user interface behavior designed for the new portal. If your implementation has introduced your own CM business object and CM Determine BO algorithm, you should review your business object's configuration and align it with the base business object.

Upgrade scripts ensure that users with Read access to the existing application service will have access to the new application service associated with the new portal. The table below lists the existing and new application services.

| Object           | New Application Service | Access Added to any User Groups with this Application Service/Read Access |
|------------------|-------------------------|---------------------------------------------------------------------------|
| Data Area Portal | F1DTAR                  | FWLTDARP                                                                  |

Note that any existing bookmarks for this page will take you to the previous version of the page. You need to take the following actions to move the bookmark to the new page:

1. Click the bookmark. Take note of the Data Area.
2. Navigate to the **Data Area** portal via the menu.
3. Search for and select the **Data Area** you noted from your bookmark.
4. Delete the existing bookmark from the **Bookmark** dashboard zone.
5. Click the **Bookmark** page action button to add a bookmark for this record for the new page.

## Data Correction Self-Service - Support for Orphan Record Deletion

The new Data Correction Request Root, Orphan Record Deletion, and Orphan Record Deletion Type business objects can be used together to create a request to process orphan records. In addition, there are new Backup Table Cleanup and Backup Table Cleanup Type business objects to deal with the backup tables created by the deletion request. The following points highlight features supported by these new objects:

- The Orphan Record Deletion Type defines the parameters for the deletion request, including whether to verify record counts before performing deletion and whether a backup cleanup request should be created.
- The Data Correction Request Root and Orphan Record Deletion business objects define the steps in the deletion process, including:
  - o Capturing the table with orphan records, and the number of records affected.
  - o Generating the SQL to perform deletion directly in the database.
  - o Sending the data correction request to another user for approval.

- o Submitting a batch process to perform the deletion in background.
- o Trapping errors and allowing for the request to be cancelled or restarted if the errors are fixed.
- o Creating a new request to clean up backup tables added during the deletion processing.

### Steps To Enable

Provide the required access before using the feature.

### Tips and Considerations

To enable users to create requests for orphan record deletion, you must give them add access to the application service for the new Data Correction Request Root business object (F1-DATACORRECTIONRBO).

Upgrade scripts ensure that users with Read access to the existing request type all-in-one portal will have access to the new application service associated with the new query portal. The table below lists the existing and new application services.

| Object              | New Application Service | Access Added to any User Groups with this Application Service/Read Access |
|---------------------|-------------------------|---------------------------------------------------------------------------|
| Request Type Portal | F1REQTYQ                | F1REQTYP                                                                  |

### Access Requirements

System administrators should grant access to the F1-DATACORRECTIONRBO application service for any user that is going to create requests for orphan data correction.

## Feature Configuration Portal

The **Feature Configuration** page has been converted to a portal, leveraging a more flexible and extendable user interface metaphor. The portal organizes information in a way that makes it easier to review the UI map's configuration and includes the following key features:

- Better use of the **Main** tab space to display information concisely.
- A standard approach for maintaining options, as used by similar entities like business object.
- External message configuration may be relevant to very few feature types. As such, the new portal includes this information only when applicable.
- Ability to enforce a single configuration record for a feature type in a configurable way that does not require Java code changes.

A new **Feature Type Configuration** extendable lookup was introduced to control whether one or more configurations are allowed for a feature type. It also controls whether external messages configuration is applicable for the feature type. By default, if an extendable lookup record does not exist for a feature type, it is assumed to allow a single configuration and not support external messages configuration.

### Steps To Enable

No steps are required to enable this feature.

## Tips and Considerations

A new business object (BO) for UI Map and a new Determine BO algorithm linked to the Maintenance Object were introduced. The base BO includes all the user interface behavior designed for the new portal. If your implementation has introduced your own CM business object and CM Determine BO algorithm, you should review your business object's configuration and align it with the base business object.

Upgrade scripts ensure that users with Read access to the existing application service will have access to the new application service associated with the new portal. The table below lists the existing and new application services.

| Object                       | New Application Service | Access Added to any User Groups with this Application Service/Read Access |
|------------------------------|-------------------------|---------------------------------------------------------------------------|
| Feature Configuration Portal | F1FCFG                  | CILTWDSP                                                                  |

Note that any existing bookmarks for this page will take you to the previous version of the page. You need to take the following actions to move the bookmark to the new page:

1. Click the bookmark. Take note of the Feature Configuration.
2. Navigate to the **Feature Configuration** portal via the menu.
3. Search for and select the **Feature Configuration** you noted from your bookmark.
4. Delete the existing bookmark from the **Bookmark** dashboard zone.
5. Click the **Bookmark** page action button to add a bookmark for this record for the new page.

## UI Map Portal

The **UI Map** page has been converted to a portal, leveraging a more flexible and extendable user interface metaphor. The portal organizes information in a way that makes it easier to review the UI map's configuration and includes the following key features:

- Better use of the **Main** tab space to display information concisely. For example, have the HTML editor more easily accessible.
- A more comprehensive list of references to the UI Map and its schema.
- Uncluttering of the sidebar by moving UI Map tips to the new portal.

## Steps To Enable

No steps are required to enable this feature.

## Tips and Considerations

A new business object (BO) for UI Map and a new Determine BO algorithm linked to the Maintenance Object were introduced. The base BO includes all the user interface behavior designed for the new portal. If your implementation has introduced your own CM business object and CM Determine BO algorithm, you should review your business object's configuration and align it with the base business object.

Upgrade scripts ensure that users with Read access to the existing application service will have access to the new application service associated with the new portal. The table below lists the existing and new application services.

| Object        | New Application Service | Access Added to any User Groups with this Application Service/Read Access |
|---------------|-------------------------|---------------------------------------------------------------------------|
| UI Map Portal | F1UIIMP                 | FWLTUIMP                                                                  |

Note that any existing bookmarks for this page will take you to the previous version of the page. You need to take the following actions to move the bookmark to the new page:

1. Click the bookmark. Take note of the UI Map.
2. Navigate to the **UI Map** portal via the menu.
3. Search for and select the **UI Map** you noted from your bookmark.
4. Delete the existing bookmark from the **Bookmark** dashboard zone.
5. Click the **Bookmark** page action button to add a bookmark for this record for the new page.

## Allowlist for Sending Files as Email Attachments

The F1-EmailService business service supports the ability to indicate information to be sent in the email as an attachment. The service supports referencing a record in the Attachment object. In addition, for on premises clients only, it supports referencing a file path and file name directly. In this release, the file paths referenced in this direct method must be 'registered' in the File Storage extendable lookup.

Note that the validation to check against the file storage extendable lookup is delivered in this release. If your implementation uses the technique of referencing a file path and file name when calling F1-EmailService, you will need to configure appropriate entries before proceeding. The system supports defining a "parent" directory in the file storage extendable lookup. When invoking F1-EmailService, providing a directory within the registered "parent" directory is supported. For example, if you register the path D:\systemFiles\, at runtime when invoking F1-EmailService, you can provide a file in the path D:\systemFiles\CMA.

The allowlist for file paths ensures that the files included in an email are stored in an approved location.

### Steps To Enable

To continue using the technique of sending emails with files from a specified file path, complete these steps:

1. Navigate to **Extendable Lookup**.
2. Search and select the **F1-FileStorage** business object.
3. Use the **Add** button to add an entry for a given file path.
4. Define an appropriate **Value** and **Description**.
5. In the **File Adapter** drop-down, choose Native File Storage.
6. In the **File Path**, define a valid file path that may be referenced when sending an attachment. Parent directories may be defined here. At run time, references to child directories within the directory listed here are considered supported.
7. Repeat the step for any unique parent directory that your implementation uses for indicating files to attach when calling F1-EmailService.

## Integration Enhancements

This section describes the following new and enhanced integration tools introduced in this release:

- [Support for Application Variables in Outbound Message Payload](#)
- [Object Storage Region Configuration Improvements](#)
- [URL Navigation to a Portal Using Its Navigation Option](#)

### Support for Application Variables in Outbound Message Payload

Some products require that "Application ID" and "Tenant ID" values are included with certain API calls, typically as a way to identify the calling application for reporting purposes. These values are provided to the utility at onboarding time and need to be captured in the application in relation to these API configurations.

As of this release, the Message Sender context information was enhanced to also capture the following application details:

- Application ID
- Tenant ID

The new details are not involved in the process of orchestrating and routing the call. They need to be incorporated into the payload by the application logic that composes the message using the new "Get Application Variables (F1MsgVars)" service script.

#### Steps To Enable

No steps are required to enable this feature.

### Object Storage Region Configuration Improvements

The definition of valid cloud object storage regions are now configured using an extendable lookup rather than a lookup. Defining the regions in an extendable lookup allows us to support defining both the region key and the region identifier. Previously, using a lookup to define the region supported only defining the region key. Product code was required to map the region identifier, requiring code change any time a new region was defined.

The product provides base delivered values for all the regions that are provisioned for cloud services. You can define a region for cloud object storage that is not provided by the base produce using the region value in the extendable lookup.

For backward compatibility for upgrading implementations, all regions previously provided in the lookup that are not in the list of those that the product is supplying are provided in the extendable lookup with a "CM" (customer modification) owner.

This does not impact any extensions.

As Oracle Cloud expands the regions it offers, this change allows the services to react to these new regions quickly without changes to the product code.

### Steps To Enable

No steps are required to enable this feature.

## URL Navigation to a Portal Using Its Navigation Option

Previously, the application supported a URL navigation to portal only via the portal's internal navigation key as the **Location URL** parameter. While a page's internal navigation key could change due to internal design implementations, its navigation option remained unchanged. As a result, it was better to share a page's navigation option with an external system than the internal navigation key.

In this release, a new URL parameter **LocationNavOpt** was introduced to support URL navigation to a portal using its navigation option.

Supporting URL navigation to a portal using its navigation option makes such UI integration flows more resilient to portal internal navigation key changes.

### Steps To Enable

To enable this feature, integrations must be updated to use the new **LocationNavOpt** URL parameter with the desired navigation option code when launching the application.

## Content Migration Assistant (CMA) Enhancements

This section describes the following new and enhanced CMA features introduced in this release:

- [Content Migration Assistant Export by Entity Tag](#)
- [Improved Support for Large Numbers of SQLs in Migration Object](#)
- [Improved Base Product Content Migration Assistant Requests](#)
- [Configuration Deletion Portal](#)
- [Improved Migration Related Searches](#)
- [Content Migration Assistant Web Service](#)
- [Correction Allowed for Pending Import Data Set Record](#)
- [Import Data Set Cancellation](#)
- [Improved Handling of Environment Specific Entities Imported by CMA](#)
- [Migration Data Export - New Status When No Records Selected](#)

### Content Migration Assistant Export by Entity Tag

You can now use entity tags to identify entities to export using Content Migration Assistant (CMA). The criteria based migration request functionality is enhanced to support a tag based export instruction as a way of exporting all entities associated with an entity tag.

This allows developers to collate their extensions in a similar way to bundling, but it harnesses the power of the Content Migration Assistant engine.

#### Steps To Enable

No steps are required to enable this feature.

### Improved Support for Large Numbers of SQLs in Migration Object

When importing an object into an environment using Content Migration Assistant (CMA), the product supports selecting one or more SQLs associated with the object and suppressing them. At the apply stage, these SQLs are not included. This is useful when your object has one or more child rows that you prefer not to include in the target environment. In this release, the steps for selecting and marking records to suppress or unsuppress have been enhanced to support objects that have a large number of child records, and therefore a large number of SQLs. Now, instead of clicking **Edit** in the **Migration Object** main display zone, the **List of SQL Statements** zone now has **Suppress** and **Unsuppress** actions. You can use the filters on this zone to narrow down the results, select the appropriate records, and click the desired action.

Additional changes were made to the **List of SQL Statements** zone to better support a large number of records:

- The zone is now configured for Pagination, showing 500 records for a page.
- Additional filter values have been added. You can now do a likable search on the SQL statement text. In addition, you can limit the results to excluded suppressed rows or to only show the suppressed rows.

#### Steps To Enable

No steps are required to enable this feature.

### Improved Base Product Content Migration Assistant Requests

Previously, some base product migration requests were inefficiently exporting all records of an entity, including many base owned records where the maintenance object did not include fields that could possibly contain customized content. Exporting so many of these entities placed a performance burden on the import step to load, compare, and eventually not apply them.

The following migration requests were enhanced to be more efficient and only export custom-owned entities for maintenance objects that do not contain custom fields:

- F1-SystemConfig
- F1-SecurityConfig
- F1-SecurityConfigWithoutUsers
- F1-Tags
- F1-MigrationAdmin
- F1-IntegrationConfig

#### Steps To Enable

No steps are required to enable this feature.

### Configuration Deletion Portal

You can identify and delete configuration entities that were previously imported via Content Migration Assistant (CMA) and are no longer needed using the new **Configuration Deletion** portal.

The new portal assists a system administrator in reviewing and deleting configuration data as follows:

- The administrator selects a set of CMA import data sets that represents a complete imported configuration. This can be done via an external reference name and up to five data set IDs.
- A summary list of maintenance objects included in the reference set is presented along with the number of applied or unchanged entities for each.
- Selecting a maintenance object presents all entities for that type that exist in the current environment but are not included in the reference set. These are the entities the administrator may select for deletion.

This does not impact any extensions.

### Steps To Enable

System administrators should set/grant users/grant access to the F1CFGDEL - Configuration Deletion Portal application service.

## Improved Migration Related Searches

A new query option, **Included Entities**, is available in the **Migration Plan Query** portal. You can use this option to find migration plans that include other entities. In addition, you can now search for import data sets based on their bulk mode option, which is also presented in the query results.

The ability to search for migration related entities by various criteria helps you review the CMA migration configuration.

This does not impact any extensions.

### Steps To Enable

No steps are required to enable this feature.

## Content Migration Assistant Web Service

A new API is available, via a REST Service, to allow tools to create and monitor export and import requests for the Content Migration Assistant. The API supports several operations:

- Create a Migration Data Export Request by specifying the key elements in the JSON payload. This returns the Migration Set Identifier created.
- Return the state of a Migration Data Export Request using the Migration Set Identifier as the key.
- Create a Migration Data Import Request by specifying the key elements in the JSON payload. This returns the Migration Set Identifier created.
- Return the state of a Migration Data Import Request using the Migration Set Identifier as the key.

### Steps To Enable

System administrators should set/grant users/grant access to the access mode F1EX for the application service F1MIGRDS.

## Correction Allowed for Pending Import Data Set Record

An **Edit** action is now supported for minor corrections. The action is available while the record is still in pending status and the monitor batch process has not begun. Previously, an import data set that was added incorrectly had to be canceled.

Supporting an edit action on pending import data set records makes it easy to handle minor corrections and improves the user experience.

### Steps To Enable

No steps are required to enable this feature.

### Tips and Considerations

The action requires standard change access rights to the migration data set import business object's application service (F1MIGRDIMP).

## Import Data Set Cancellation

Previously, the canceled import data set status represented a request to cancel the dataset and a final status where all objects and transactions were already canceled. This caused a performance issue for the migration object apply batches as they needed to cancel (instead of apply), objects that belonged to a canceled dataset. This included the many data sets that were already fully canceled.

This release supports a distinction between a data set "pending cancel" status, that is a requested to be canceled, and the final "cancelled" status to which the data set transitions to when all its transactions and objects are canceled. With this new approach, you initially set the data set to pending cancel status and the data set is finally cancelled the next time the import data set monitor batch process runs after all the transactions and objects are canceled.

In addition, the import data set lifecycle now allows cancellation from any non-finalized status.

A new **Non-Final Data Sets** query option was added to the **Migration Dataset Import Query**, which considers only non-finalized records and allows for the cancellation of multiple data sets.

### Steps To Enable

No steps are required to enable this feature.

### Tips and Considerations

The first batch run of the Migration Data Set Import Monitor (**F1-MGDIM**) batch process may take longer as it transitions all cancelled data sets to the final cancelled status.

## Improved Handling of Environment Specific Entities Imported by CMA

The File Storage extendable lookup captures environment-specific information, which makes it easy to surpass file storage settings using CMA. The same issue exists with specific master configuration entities that may contain environment-specific values.

These records may be initially imported from another environment, but they are typically adjusted manually to reflect current environment settings and should not be updated again by an import. In this release, a mechanism is introduced to prevent an unintentional update of such records by a CMA import. The mechanism allows for these records to be added by an import without being updated.

The mechanism works as follows:

- A new Environment Specific Business Object option may be used to mark records as containing environment specific information. The option type is available for Extendable Lookup and Master Configuration business objects, but you can configure it to be valid for other maintenance objects.
- A new migration plan pre-compare algorithm is provided that prevents an update of an entity if its business object is configured with this option. The algorithm is added to the Extendable Lookup and Master Configuration default migration plans, and you can add it to other migration plans as needed.

The File Storage extendable lookup business object is marked as containing environment-specific information using the new option. It should not be updated even if imported unintentionally from another environment.

In addition, the following changes were made to keep such entities in environment specific related migration requests:

- The wholesale **General System Options** migration request excludes extendable lookup and master configuration records if their business object indicates they contain environment-specific information.
- The wholesale **Framework Integration Configuration** migration request includes only extendable lookup and master configuration records if their business object indicate they contain environment-specific information.

### Steps To Enable

No steps are required to enable this feature.

### Tips and Considerations

- If your implementation has other extendable lookup or master configuration business objects that must not be updated by CMA you may associate them with the new option.
- If this functionality is needed for other maintenance objects, add the new option type as valid for these maintenance objects and adjust their default migration plan accordingly.
- You may also want to review your custom migration requests to exclude these business objects as needed.

## Migration Data Export - New Status When No Records Selected

In this release, a new "No Records" status value has been introduced for the Migration Data Set Export to handle the condition where no records were found by the migration request instructions. This allows you to quickly distinguish between a data set that has an error that needs to be investigated and situations where there were simply no records that satisfied the selection criteria.

The condition of no records found by the migration request instructions when exporting now uses a special status, allowing you to distinguish this condition from errors that need to be investigated.

### Steps To Enable

No steps are required to enable this feature.

### Tips and Considerations

If your implementation has any downstream steps that are looking at the status of the Migration Data Set Export to do subsequent steps, you may need to review that logic and confirm whether any steps need to be adjusted based on this new status value.

## Web Services Enhancements

This section describes the following new and enhanced web services features introduced in this release:

- [Define Default Template User for User Provisioning](#)
- [Improved Handling of Null Values in REST APIs](#)
- [Improved Message Sender Context Customization](#)
- [Support Language in REST Request](#)
- [User Provisioning Using the SCIM Open Standard](#)
- [User Import with Content Migration Assistant](#)

### Define Default Template User for User Provisioning

The F1-OIMUSR (Populate User Data from a "Template" User) algorithm was enhanced to allow a Template User to be provided as a parameter. The algorithm is used by the User business object F1-IDMUser, which is used to create users from an external source. For example, the LDAP batch process uses this business object to create a user. The algorithm to copy information from a template user allows application configuration, such as user groups, user preferences, To Do roles, and other information not supplied by the external system, to be populated on the new user. Previously, this algorithm relied on the value of the template user to be provided as part of the payload for adding the user, using a characteristic. In this release, the algorithm first checks for a template user provided as a characteristic. If it is not found, it uses the template user provided as a parameter to the algorithm, if populated.

#### Steps To Enable

To enable this feature, complete these steps:

1. Go to **Admin > Security > User** in add mode and define the template user whose application configuration should be copied onto any new user.
2. Go to **Admin > System > Algorithm**.
3. Search for and select the algorithm **F1-OIMUSR**.
4. Click **Edit**, and then click the + in the Algorithm Parameter collection.
5. Enter an appropriate effective date and the Template User created above.

### Improved Handling of Null Values in REST APIs

Date and time elements in requests and response messages require special handling when they contain no value. Unlike a string value, no value for date, time, and date/time elements has to be represented as null and not an empty string. In the same way, a numeric or Boolean element with "no value" should be represented as a null, not an empty string. Previously, the application did not properly accept null values for date and time elements in a JSON request. The application incorrectly represented such values in a JSON response as empty strings. The application correctly handled null values for numeric and Boolean elements except for a few outlier situations that were also fixed as part of this enhancement.

In this release, the Inbound Web Service REST engine v2 is enhanced to properly accept and process null values for elements of all data types.

The following clarifies some differences around request and response processing:

- As part of a request document, any element of any data type can be sent in with a null value, whether via the nil attribute in XML or the null value in JSON.
- As part of a JSON response document, empty node elements would be removed from the response or assigned either a null or empty string based on their data type:
  - o A string element would always be assigned "" an empty string. This includes all types of string data types like lookup, etc. This already works this way, no change in this release.
  - o A date, date/time, time element would have a null value.
  - o A number, money element is consistently removed from the response. Previously, this was not the same for some outlying scenarios.
  - o A Boolean element is consistently removed from the response. Previously, this was not the same for some outlying scenarios.

#### **Steps To Enable**

No steps are required to enable this feature.

### **Improved Message Sender Context Customization**

For most integrations supported by the base product, the end point URL and other details may only be provided by the utility at provisioning time. Previously, the entire message sender definition for such integration point had to be defined by the utility along with the configuration of the external system record that references the message sender.

As of this release, partially defined message senders may be released with the base product, allowing utilities to complete the definition with the necessary context information. This also allows the base product to include a more comprehensive configuration that includes the external system record that references the message sender.

#### **Steps To Enable**

No steps are required to enable this feature.

### **Support Language in REST Request**

The REST engine considers the information populated in the Accept-Language header attribute. If a single value is provided, the system checks if the application has that language as a supported language in the application. If so, it returns translatable text in that language. The system looks for an entry in the Language table where the Locale field matches the value passed in Accept-Language.

If multiple entries are provided in the Accept-Language, the system uses HTTP content negotiation to select one of the provided values. If no supported language is found for the Accept-Language content, the system returns information in the language of the system user used to make the REST call.

#### **Steps To Enable**

No steps are required to enable this feature.

## User Provisioning Using the SCIM Open Standard

A new REST service, SCIM User Provisioning (F1-SCIMUser), is provided to support adding, changing, or viewing the details of a user where the API follows the SCIM standard.

The following highlights some of the mapping between the SCIM API and the application's user record:

- The user record in the application supports only first name and last name. The SCIM standard supports additional detail such as middle name, suffix, and prefix. These elements are ignored when adding or updating a user.
- The SCIM standard supports a collection of email addresses. The application only supports one email address. As such, only the first email address is used when adding or updating a user.
- A user in the application requires several application specific settings in order to be added properly. When adding a user record via the Create User operation in this new REST service, the integration supports supplying a Template User reference (in the user type element in the API). The system copies application settings from that user to the new user being provisioned.

### Steps To Enable

Provide the required access before using the feature.

### Tips and Considerations

The inbound REST web service provided is F1-SCIMUser. Refer to its description along with the help text on the various elements for more information on using the REST service.

You need to define a template user in order to successfully add a User record via this REST service. The template user can be provided in the userType element. Alternatively, you can define the Template User as a parameter to the algorithm F1-OIMUSR (Populate User Data from a "Template" User). Refer to the separate feature "Define Default Template User for User Provisioning" for more information.

### Access Requirements

System administrators should set/grant users/grant access to the Execute access mode on the CILTUSEP application service for the web service user that calls the new REST web service.

## User Import with Content Migration Assistant

The user record includes a user hash for security reasons. This hash value is calculated using a cryptography key in a given environment. When using Content Migration Assistant to import users from another environment, the process now includes a step to recalculate the user hash value using the target environment's cryptography key.

This update means implementations can import users from one environment to another without getting an error related to the user hash.

### Steps To Enable

No steps are required to enable this feature.

## User Interface Experience Enhancements

This section describes the following new and enhanced user interface experience features introduced in this release:

- [Batch Run Portal](#)
- [Focused User Access Checks for Business Object Maintenance Flows](#)
- [Standardize Bundle Portals](#)
- [Access Zone Tips via Zone Portal](#)
- [Batch Jobs Summary Zone Sorted by Start Date/Time](#)
- [Conditional Expansion of a Tree Node](#)
- [Improved Display of Overridden Labels](#)
- [Improved Process Flow Cancellation Experience](#)
- [Improved Process Flow Query](#)
- [Non-applicable Zone Header Actions Hidden on Batch Run Portal](#)
- [Process Flow Characteristics](#)
- [Sidebar Reorganization](#)
- [Worklist Sidebar Zone Hidden When Empty](#)
- [Application Toolbar Consolidation](#)
- [Determine Insight Group by Action Method](#)
- [Improved Sort Order of Insights](#)
- [New Base Display Icon Images](#)
- [Schema Time Zone Support for Date/Time Elements Stored in Legal Time](#)
- [Switch Language Zone Only Visible When Applicable](#)
- [Compact View of User Interface](#)
- [Consistent User Interface Label Justification](#)
- [File Integration Record Portal](#)
- [Option to Suppress an Explicit Map Zone's Header](#)
- [Option to Suppress the Page Title Area](#)
- [Option to Suppress Tabs on a Page](#)

## Batch Run Portal

The **Batch Run Tree** page has been converted to a portal, leveraging a more flexible and extendable user interface metaphor. The portal organizes information in a way that makes it easier for you to review and analyze performance and exception information for a batch run.

The following are the main new features supported by the portal:

- High level information and overall thread status are provided in the **Main** tab.
- Improved user experience in reviewing thread information (even for a high number of threads), which includes filtering, sorting, broadcasting of detailed information about a thread, and more. The previous tree presentation of threads, instances and error messages was not easy to navigate and review.
- Ability to review error messages across threads.
- Better way to review To Do entries created by the batch process.
- Display of file names created by the batch process.
- Display thread related analytical information.
- Display historical statistics from the last 20 runs.
- Use new actions to set and reset the Do Not Restart indication only when the current batch run is in error and is the latest run.

In addition, a standard **Batch Run Query** portal is also provided to support search functionality.

This does not impact any extensions.

### Steps To Enable

No steps are required to enable this feature.

### Tips and Considerations

There is a new business object for Batch Run and a new Determine business object algorithm linked to the Maintenance Object. The base business object includes all the user interface behavior designed for the new portal. If your implementation has introduced your own CM business object and CM Determine BO algorithm, you should review your business object's configuration and merge it into the base business object.

Upgrade scripts ensure that users with Read access to the existing application service will have access to the new application service associated with the new portal. The table lists the existing and new application services.

| Object                 | New Application Service | Access Added to any User Groups with this Application Service/Read Access |
|------------------------|-------------------------|---------------------------------------------------------------------------|
| Batch Run Portal       | F1BTCCHTH               | CILTBTRP                                                                  |
| Batch Run Query Portal | F1BTRQ                  | CILTBTRP                                                                  |

## Focused User Access Checks for Business Object Maintenance Flows

When a business object based entity is displayed and maintained online, the logic that prepares the data in these flows reside in designated scripts associated with the record's business object. These scripts may be designed to read other entities and call other services in addition to the main entity being processed. A common example is that a transactional object may invoke the related "type" object to get information.

User access in these specific online maintenance flows are now enhanced to focus on the main entity being processed. In the example of the transactional object invoking the related "type" object to get information, the user is not required to have access to the "type" object. Prior to this release, every one of these additional object reads and service calls were also checked for user access (in addition to the main entity being processed). This situation required that the user was granted access to secondary entities, like admin "type" objects and internal services, which inadvertently also enabled access via the main menu.

This does not impact any extensions.

### Steps To Enable

No steps are required to enable this feature.

## Standardize Bundle Portals

The **Bundle Export** and **Bundle Import** search portals supported a broadcast action to view the details of a bundle that deviated from standards. This is replaced by standard work list capability, which allows you to quickly review the details of each bundle from the search results.

Standardizing the export and import bundle query portals allows for a more consistent user experience across all search portals.

This does not impact any extensions.

### Steps To Enable

No steps are required to enable this feature.

## Access Zone Tips via Zone Portal

The **Zone Tips** sidebar zone was removed from the sidebar. You can now access these tips from the **Zone** portal. Most of the tips point to topics that are already grouped together and easily accessible from the standard online help documentation for the **Zone** portal. The allowed list of SQL functions may be viewed from a new zone header action added to the data explorer SQLs zone.

Accessing zone tips via the **Zone** portal is better integrated with specific portal content, eliminates redundancy with existing standard help information, and assists with uncluttering the sidebar of unnecessary content.

### Steps To Enable

No steps are required to enable this feature.

## Batch Jobs Summary Zone Sorted by Start Date/Time

The **Batch Jobs Summary** zone is now sorted by Start Date/Time, and this zone sort sequence was amended to allow pagination to preserve the start time sort sequences. Previously, the **Batch Jobs Summary** zone was sorted by batch code, run number, and rerun number and column sorting was lost when navigating to the next and previous pages.

Sorting by start date/time allows for paging through the batch jobs in start time order, which is the preferred order for the majority of users.

### Steps To Enable

No steps are required to enable this feature.

## Conditional Expansion of a Tree Node

The **Populate Node** algorithm entity now allows business rules to set an indication of whether a tree node should be initially expanded or not. When populated, the indication overrides the setting on the tree node definition. Previously, a tree node could be defined to be initially expanded or not as part of the tree configuration. There are cases where the node should be conditionally expanded based on business rules. For example, to prevent the initial expansion when the number of child nodes exceeds a certain threshold.

Supporting a more flexible method for presenting a tree structure where some nodes are expanded and some not based on business rules allows for a better user experience.

### Steps To Enable

No steps are required to enable this feature.

## Improved Display of Overridden Labels

Entities that support override labels typically display both the original and overridden values, except when these labels are maintained as a list. For example, on the Lookup portal, values and their labels are displayed as a list for which the override value (if it exists) is presented instead of the original label. Previously, you had to edit the record to view the original value, and there was no visual cue as to which label was overridden.

Now a list-based display of overridable labels is standardized to show the original and overridden values so that you do not have to edit a record to see the full content.

### Steps To Enable

No steps are required to enable this feature.

## Improved Process Flow Cancellation Experience

When you cancel a process flow, you navigate back to the previous page you were working on. Previously, cancelling a process flow resulted in a blank process flow page.

This allows for a more intuitive and efficient user experience.

### Steps To Enable

No steps are required to enable this feature.

## Improved Process Flow Query

By default, the process flow query now displays the current user's in-progress process flows. The user may further bookmark the query as a quicker way to get to these flows. The new **My Process Flows** query option also supports the ability to delete multiple flows as needed. You can no longer delete another user's process flow.

Previously, the process flow query portal may have been accessed from different parts of the menu by different products. As of this release, it is included in the **Tools** submenu consistently across all products.

### Steps To Enable

No steps are required to enable this feature.

## Non-applicable Zone Header Actions Hidden on Batch Run Portal

The **Download Zone** header action links on the **Threads** zone of the **Batch Run** portal are now shown only if the corresponding file exists and the user has security access to download the file.

In addition, the **Close** header action link is only shown when more than one batch job request was submitted for the batch run. When a single batch job exists, its parameters are displayed by default and there is no need to close the zone.

### Steps To Enable

No steps are required to enable this feature.

## Process Flow Characteristics

The control data area structure shared by all process flow scripts now includes a list of characteristics. Process flow scripts may populate the list as needed, and the list is saved along with the process flow record by the base product's process flow manager.

Allowing process flow business rules to capture additional details about a flow makes it easier to locate flows in progress that you may want to resume.

### Steps To Enable

No steps are required to enable this feature.

## Tips and Considerations

If your implementation uses a custom process flow manager script, you may need to adjust it to handle characteristics in order to take advantage of this functionality. Refer to the base product's process flow manager script for more information.

## Sidebar Reorganization

The sidebar content is organized into **Main**, **Favorites**, and **Tools** sidebars. These are accessible using an icon bar at the bottom of the sidebar.

A portal of type sidebar is introduced for the **Main**, **Favorites**, and **Tools** sidebar. **Sidebar** zones that represent the user's favorite options are displayed as part of the **Favorites** sidebar portal and those classified as tools are displayed in the **Tools** sidebar portal. The remaining zones are displayed as part of the **Main** sidebar portal and are considered key information.

This enhancement allows context sensitive zones to be directly linked to these sidebar portals and displayed relative to other zones on the portals. These context-sensitive zones can now be managed for user preference like any other zone.

This is the default configuration for new customers, but it is an opt-in feature for upgrading customers.

When enabled, it is recommended that you review your custom sidebar zones. When applicable, move the zones to the favourites or tools sidebar portals to unclutter the main sidebar and keep the focus on only key information.

In addition, the **To Do Summary** zone is no longer available by default on the sidebar for new installations. The **To Do Management** and **To Do Dashboard** portals, introduced in prior releases, provide better tools to manage and review this information, so there is no need to include it on the sidebar by default as well. If you wish to still use this sidebar zone, you can add it as needed. Note that the zone is retained as a custom zone for existing customers.

### Steps To Enable

To enable this feature, complete these steps:

1. Go to the Sidebar Configuration Extendable Lookup.
2. Set the CI\_DASHBOARD record to inactive.
3. Set the other records to active.
4. Flush the cache.

## Worklist Sidebar Zone Hidden When Empty

As part of an effort to unclutter the sidebar, this zone is now hidden when it is empty. Previously, the **Worklist** sidebar zone was always present when enabled regardless of whether it contained a list to manage or not.

This update reduces unnecessary content in the sidebar and improves the user experience.

### Steps To Enable

No steps are required to enable this feature.

## Application Toolbar Consolidation

The application toolbar area has been streamlined to one line to allow for more space for the main display area.

Several changes have been made to the application toolbar.

- There is now a single **Menu** icon. **Main Menu** and **Admin Menu** are line items in the new consolidated menu dropdown. Note that the shortcut key previously used to open the Admin Menu (Ctrl+Alt+A) has been deprecated.

Note that to open submenus, you need to click the line of the name of the submenu. Previously, hovering your mouse on the submenu line expected the selection

- In addition if you have any Favorite Links, Favorite Scripts, Favorite Searches or Bookmarks configured, they are also menu items in this new consolidated menu. The sidebar zones for these are still supported.
- Navigation history is no longer a separate button. Now, if you want to see a list of your previous navigation, you simply click and hold the 'back' arrow button. The same functionality works for the 'forward' arrow button. Clicking and holding show you navigation that you had performed and have since 'gone back' from. Note that the shortcut key that used to open the History (Ctrl+Alt+H) has been deprecated.
- The badge with the environment's domain name (if populated) is now displayed directly after the product name.
- The button to toggle the sidebar to collapse / expand was previously an arrow icon on the vertical border between the sidebar and the main display area. This has been replaced by an icon in the header, adjacent to the 'help' menu icon. The icon visible depends on whether your sidebar is configured on the left or the right side of your display. Note that the shortcut key "Alt + J" is still configured for this feature.
- The **Home** icon button is now on the right side, adjacent to the toggle sidebar.
- In an environment where links to **Control Central** and **Account Information** are configured in the toolbar, these are now icons rather than link text and they are positioned before the **Advanced Search** widget.
- Finally, the toolbar is now responsive when zooming in or when resizing the browser window. As the width of the browser gets smaller, the following will occur:
  - o The application name is shortened and an ellipsis is added.
  - o The environment badge, if visible, is removed.
  - o The application name is removed.
  - o The home icon is removed.
  - o Finally, the search widget is removed.

### Steps To Enable

No steps are required to enable this feature.

## Determine Insight Group by Action Method

An insight class defines the UI context for which insight information should be provided. Prior to this release, the types of insights included in that context were defined by a single insight group associated with that insight class. There are situations where the list of insight types may vary based on some configuration criteria like CIS division for example. As of this release, action method rules may be used to determine the insight class to use when multiple are defined for an insight class.

Allowing multiple insight groups for an insight class and determining the appropriate one to use by action method rules supports more flexible insight configurations.

### Steps To Enable

No steps are required to enable this feature.

## Improved Sort Order of Insights

Prior to this release, insights were sorted alphabetically by insight type code. In this release, insights are sorted by their severity category when applicable, followed by the relative sequence of the insight type within the insight group definition and only then by the insight type code.

Sorting insights by severity and a configurable display order allows for a better user experience.

### Steps To Enable

No steps are required to enable this feature.

## New Base Display Icon Images

The following additional SVG icons are provided for use in contextual insights, trees, and other user interface features that support SVG icons.

| Icon                                                                                | ID       | Description           |
|-------------------------------------------------------------------------------------|----------|-----------------------|
|  | F1ARWORD | Arrow - Open - Down   |
|  | F1ARWOL  | Arrow - Open - Left   |
|  | F1ARWOR  | Arrow - Open - Right  |
|  | F1ARWOU  | Arrow - Open - Up     |
|  | F1CISRCH | Search - Content Item |
|  | F1CLFT   | Chevron - Left        |

| Icon                                                                                | ID         | Description          |
|-------------------------------------------------------------------------------------|------------|----------------------|
|    | F1DETINFO  | Information - Detail |
|    | F1EDITBOX  | Edit - Box           |
|    | F1ERASER   | Eraser               |
|    | F1LOCKC    | Lock - Closed        |
|    | F1LOCKO    | Lock - Open          |
|    | F1MENUO    | Menu - Overflow      |
|    | F1RESET    | Reset                |
|    | F1RESETDD  | Reset - Dirty Data   |
|    | F1RESETF   | Reset - Filters      |
|    | F1SLASH    | Slash - Forwards     |
|  | F1ADOWN    | Arrow - Down         |
|  | F1APPRLIST | Approved List        |
|  | F1AUP      | Arrow - Up           |
|  | F1BCK2MAP  | Back To Map          |
|  | F1BKMARK   | Bookmark             |
|  | F1CONT     | Contact              |
|  | F1CONTG    | Contact Group        |
|  | F1CONTGA   | Contact Group - Add  |
|  | F1DATADOC  | Data Document        |
|  | F1DIAMOND  | Diamond              |

| Icon                                                                                | ID         | Description                |
|-------------------------------------------------------------------------------------|------------|----------------------------|
|    | F1DOMAIN   | Domain                     |
|    | F1NEWWIN   | Open in New Window         |
|    | F1PAUSEC   | Pause - Circled            |
|    | F1PEN      | Pen                        |
|    | F1RECNTR   | Re-center                  |
|    | F1ROWRMV   | Row - Remove               |
|    | F1SBARL    | Sidebar - Left             |
|    | F1SBARR    | Sidebar - Right            |
|    | F1SQUARE   | Square                     |
|    | F1TARGET   | Target                     |
|   | F1TOOLSHW  | Tools - Hammer and Wrench  |
|  | F1TOOLSW   | Tools - Wrench             |
|  | F1VBOXNRW  | Vertical Box - Narrow      |
|  | F1VBOXWIDE | Vertical Box - Wide        |
|  | F1XMLSCH   | XML Schema                 |
|  | F1SBARLC   | Sidebar - Left- Collapse   |
|  | F1SBARLE   | Sidebar - Left - Expand    |
|  | F1SBARRC   | Sidebar - Right - Collapse |
|  | F1SBARRE   | Sidebar - Right - Expand   |

Additional icons enhance the user experience for displayed information. These have no impact on existing customizations.

### Steps To Enable

No steps are required to enable this feature.

## Schema Time Zone Support for Date/Time Elements Stored in Legal Time

Schema based UI already supports an implicit time zone and daylight-saving conversion to and from the element's storage and display time zones when the element is stored in standard time. As part of this capability, the element's time zone name is also presented along with its value on a display map for clarity.

Many date/time fields are historically stored in legal time and therefore could not have benefited from this functionality. As of this release, this functionality is also supported for elements stored in legal time.

New schema attributes `legalTime=` and `legalTimeRef=` has been introduced to explicitly identify date/time elements as stored in legal time and specify their storage time zone.

The schema based user interface engine has been enhanced to properly display and maintain such elements based on their time zone schema definition. Similar to existing functionality for elements stored in standard time.

Similarly, inbound and outbound message functionality has been enhanced to support time zone conversion for elements explicitly marked as stored in legal time. Similar to existing functionality for elements stored in standard time.

**Note:** Existing elements that do not explicitly define their storage time zone are not impacted.

### Steps To Enable

No steps are required to enable this feature.

## Switch Language Zone Only Visible When Applicable

In this release, the Switch Language zone in the sidebar is now only displayed if your implementation has more than one language enabled.

In previous releases, this zone was always visible to any user that had the appropriate security for it, even if your implementation only had one language enabled.

### Steps To Enable

No steps are required to enable this feature.

## Compact View of User Interface

There is now a system-wide option to turn on a compact view of the user interface. This option reduces the amount of whitespace on the rendered pages.

Enabling the compact view for all users in your implementation allows for more information to be displayed without scrolling.

### Steps To Enable

To enable this feature, complete these steps:

1. Navigate to **Admin > General > Feature Configuration**.
2. Search for a feature configuration entry for the **Custom Look and Feel** feature type. If one does not exist, use the **Add** action to add a feature configuration of this type.

3. Edit the record and add an entry in the options collection for the Option Type "UI View". Populate the value as 'Compact'.

## Consistent User Interface Label Justification

All user interfaces are now showing labels as right justified as specified in the Redwood user interface standards. Previously, there was an inconsistency on which side user interface elements were justified.

In addition, the spacing of the labels has been increased to reduce the instances of label wrapping.

Figure 6: User Screen

### Steps To Enable

No steps are required to enable this feature.

## File Integration Record Portal

The **File Integration Type** portal lists all the record types included in the configuration along with key details about each record type. Previously, the only way to review the entire record type definition was to edit it, which did not support navigation to various settings like data area and algorithms.

For this release, a standard **File Integration Record** portal is provided for reviewing and maintaining a record type definition. The portal also supports a list view of all record types included in the same File Integration Type configuration. The list of record types on the **File Integration Type** portal was enhanced to support navigation to the new portal.

### Steps To Enable

No steps are required to enable this feature.

### Tips and Considerations

Upgrade scripts ensure that users with Read access to the **File Integration Type** portal will have access to the new application service associated with the new **File Integration Record** portal. The table below lists the existing and new application services.

| Object                  | New Application Service | Access Added to any User Groups with this Application Service/Read Access |
|-------------------------|-------------------------|---------------------------------------------------------------------------|
| File Integration Portal | F1FLINRC                | F1FLINTP (File Integration Type Portal)                                   |

## Option to Suppress an Explicit Map Zone's Header

By default, an explicit map zone includes a header area that includes the zone title, a zone menu (with the action to Print the zone), and a collapse/expand icon.

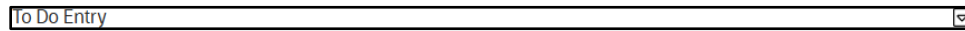


Figure 7: To Do Entry Zone

If there is a portal where this information is not needed, the system provides a new configuration to suppress the header. This is only recommended if there is one zone on the portal so the header title and collapsed option are not needed.

Suppressing an explicit map zone's header area allows you to have more vertical space when the page only has one zone and the standard actions on the zone header are not relevant.

### Steps To Enable

To suppress a map zone header, complete these steps:

1. Navigate to the explicit map zone whose header you want to suppress via **Admin > System > Zone**.
2. In the **General Parameters** section, click **Edit All** and find the **Zone Header Visibility** parameter. Alternatively, you can select the **Show All** checkbox in the header, find the **Zone Header Visibility** parameter, and click the **Edit** (Pencil) icon.
3. Enter 'false' in the **Parameter Value** field and click **Save**.
4. Flush the cache.

## Option to Suppress the Page Title Area

You can configure a portal to indicate that the page title should be hidden. You can do this by setting a portal option with type Page Title Visibility and an option value of 'false'. Be aware of the following:

- The page actions displayed in the same row as the page title are also suppressed. As such, page designers should only use this option if the actions in that area are not needed, including **Bookmark**, **Clear**, and **Refresh**.
- This type of option is only applicable to "Standalone" portals, which is related to the **Main** tab of a page. It is not applicable to other types of portal (for example a tab page portal).
- If the page has other portals associated with it (tab page portals), the page title and page actions are also suppressed for those tabs if a user clicks on any of those tabs.

Configuration to suppress the page title and page actions allows for portal-based pages to utilize more vertical space if the title and the page actions are not needed.

### Steps To Enable

To suppress a map zone header, complete these steps:

1. Navigate to the standalone portal that defines the **Main** tab for the portal page.
2. Click the **Edit** hyperlink in the **Options** zone.
3. Add a row and choose the **Page Title Visibility** option type.

4. Enter an option value of 'false' and click **Save**.
5. Flush the cache.

## Option to Suppress Tabs on a Page

You can configure a portal-based page to indicate that a tab should never appear. This is an example of the **Tab Menu Area** where tabs appear on the **To Do Entry** page.

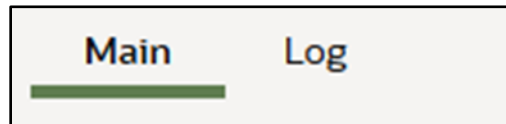


Figure 8: Tab Area

You would only want to hide the tab menu if the page has one tab (the **Main** tab), and you would like to suppress the whole **Tab Menu Area** and provide more vertical space. You can use the **Tab Menu/Tab Visibility** option type with a value of 'false' to make this change.

Additionally, you can define a service script that checks a condition and only display the tab if the conditions are met. For example, on the **Business Object** page, the **Hierarchy** tab is only applicable if the business object being viewed is part of a hierarchy. You can use the syntax `ss='serviceScriptName' input=[ ] output=booleanValue` to configure this option. Similar to zone visibility configuration, the input supports one or more name value pairs: `input=[ELEMENT_NAME=ELEMENT_REF ELEMENT_NAME=ELEMENT_REF]`, where `ELEMENT_NAME` is the target XPath in the service script to populate and `ELEMENT_REF` is either a hard-coded value surrounded by single quotes or any portal or global context field. For example, a script to check if a business object has any hierarchy may have the option type populated as follows:

`ss='CM-CheckHierarchy' input=[bo=BUS_OBJ_CD] output=shouldShowTab.`

When a tab portal is configured with a visibility option, the **Tabs** zone on the related **Main** (standalone) portal will indicate that the tab is conditional.

| Tabs |          |                |                                                                                            |                                     |  |
|------|----------|----------------|--------------------------------------------------------------------------------------------|-------------------------------------|--|
|      | Sequence | Tab Page       | Portal  | Conditional                         |  |
| 1    | 2        | Schema         | Business Object Schema                                                                     | <input type="checkbox"/>            |  |
| 2    | 3        | Algorithms     | Business Object Algorithms                                                                 | <input type="checkbox"/>            |  |
| 3    | 4        | Options        | Business Object Options                                                                    | <input type="checkbox"/>            |  |
| 4    | 5        | Lifecycle      | Business Object Lifecycle                                                                  | <input type="checkbox"/>            |  |
| 5    | 6        | Lifecycle View | Business Object Lifecycle View                                                             | <input type="checkbox"/>            |  |
| 6    | 7        | Hierarchy      | Business Object Hierarchy                                                                  | <input checked="" type="checkbox"/> |  |
| 7    | 8        | References     | Business Object References                                                                 | <input type="checkbox"/>            |  |

Figure 9: Tabs Zone

## Steps To Enable

See the feature description above for details.

## Miscellaneous Enhancements

This section describes the following miscellaneous enhancements introduced in this release:

- [Adjusted Locale for English Language](#)
- [Improved Explorer Zone SQL Maintenance](#)
- [Portal and Zone Roles](#)
- [Upload Large Attachments to Object Storage](#)
- [Maintenance Portal Configuration Improvements](#)
- [Option Configuration Visibility on Lookup Portal](#)
- [New Platform](#)
- [Sharing Attachments as Links](#)
- [Support for External URL-based Attachments](#)
- [Groovy Update to 3.0.17](#)

### Adjusted Locale for English Language

As more integrations use the Locale as the standard method to determine a language, the product is adjusting the value defined for the default language row (ENG - English) to use the generic locale "en", instead of the more specific "en-US".

The default record's configuration is now aligned with the typical browser configuration for English.

#### Steps To Enable

No steps are required to enable this feature.

### Improved Explorer Zone SQL Maintenance

Copy and delete actions are available in the SQLs zone when maintaining a data explorer zone. These actions are only allowed in an environment that owns the zone.

This makes it easier to configure queries.

This does not impact any extensions.

#### Steps To Enable

No steps are required to enable this feature.

### Portal and Zone Roles

An explicit definition of the functional role associated with portal and zones is provided.

Assigning the functional role of portal and zones in metadata allows for a more streamlined conversion to corresponding Redwood templates and other role-related configuration enhancements in the future.

This does not impact any extensions.

### Steps To Enable

No steps are required to enable this feature.

## Upload Large Attachments to Object Storage

By default, an attachment is uploaded and stored in the database along with its entire content. Prior to this release, the process of uploading very large content like videos etc. was often limited by memory constraints. In addition, storing large content in the database is costly.

As of this release, the upload process has been enhanced to support an optional configurable threshold above which content is stored in Oracle Cloud Infrastructure Object Storage and a link to the file is kept on the attachment record.

To enable this functionality, define the object storage attachment location and threshold size in the General System Configuration feature configuration. In addition, you may also use the same feature configuration to set a maximum aggregate size for concurrent attachment uploads for performance reasons.

This feature is an opt in. If such configuration is provided then large attachments are stored in Object Storage, else they are stored in the database subject to existing resource limitations if any.

The following are known limitations with storing content in Object Storage:

- The responsibility for data recovery of attachment content shifts to the customer as part of their Object Storage files management.
- Custom logic if any that relies on attachment content to exist in the database will not work for attachments stored in Object Storage.

### Steps To Enable

To enable this feature, complete these steps:

1. Add the **Attachment Location** option to the General System Configuration feature configuration.
2. Set the **Attachment Threshold Size** option on the same feature configuration.
3. Optionally, set the **Maximum Attachment Aggregate Size** option on the same feature configuration.

## Maintenance Portal Configuration Improvements

Previously, introducing a new maintenance portal would require manual effort to generate a corresponding maintenance zone, a maintenance script, and an **Add** portal action. In this release, these artifacts can be generated along with the new maintenance portal.

Generating more of the artifacts needed to support a maintenance portal saves implementation time and increases product quality.

### Steps To Enable

No steps are required to enable this feature.

## Option Configuration Visibility on Lookup Portal

The **Lookup** portal is enhanced to simplify the review of lookup fields that represent standard options by providing a navigation for each lookup value to its corresponding Option Configuration extendable lookup record.

This improves usability by providing a navigation to additional option configuration information for applicable lookup fields.

### Steps To Enable

No steps are required to enable this feature.

## New Platform

A new platform ensures you are current with the latest technologies and compliant with support and industry standards.

The following changes to the platform were implemented:

- As per previous releases, the latest versions of Google Chrome, Microsoft Edge, and Mozilla Firefox are supported. It is recommended you use the relevant corporate editions of these products.
- The products now support the latest releases of Java 17. Java 8 is not supported in this release. You must upgrade all your Java extensions and related site-specific third-party libraries to Java 17 for this release. Libraries supplied by Oracle in the installation are pre-certified, but any additional libraries must be appropriate for Java 17. See the [Oracle JDK Migration Guide](#) for more information on utilities to use and to learn about the process.
- Oracle Database 19c and Oracle Database 23ai are now supported for customers. Refer to the Oracle documentation for details of the upgrade process.
- Oracle Linux 8.x and Oracle Linux 9.x are now supported to house the product tiers. In this release, Oracle Solaris and IBM AIX are not supported as Oracle WebLogic no longer supports those platforms.

Platform changes are necessary to keep the products and service current and compliant with support and industry standards.

### Steps To Enable

No steps are required to enable this feature.

## Sharing Attachments as Links

Previously, including large attachments in emails was rejected due to content size or caused performance issues. This release supports the ability to share attachments as links instead of sharing their content.

A new **Maximum Email Attachment Size** feature option was added to the General System Configuration feature type to give you the flexibility of restricting the size of actual attachment content embedded in emails. When populated, attachments with their content stored in the database that exceed the size limit are provided as links when attached to emails.

Attachments that are not stored in the database, such as those stored in object storage or their content is referenced via an external URL, are shared only as links when attached to emails.

### Steps To Enable

No steps are required to enable this feature.

## Support for External URL-based Attachments

Documents residing in an external system can be made available as attachments using a new External URL business object. When adding an attachment, the user can specify a file name (as before) or a URL to a document in an external system.

This allows users to internally reference such attachments as needed to support their business requirements.

### Steps To Enable

No steps are required to enable this feature.

## Groovy Update to 3.0.17

Groovy was upgraded from 3.0.7 to 3.0.17.

The Groovy upgrade was necessary for Java 17 compatibility.

### Steps To Enable

No steps are required to enable this feature.

### Tips and Considerations

There are some behavior differences between Groovy 3.0.7 and 3.0.17 that may require changes to existing groovy scripts. It is strongly advised to run Compile All Groovy Scripts (F1-CAGVY) and remediate any compilation errors before the upgrade so that existing compilation errors are not attributed to this groovy upgrade.

# Deprecation Notices for OUAF Version 25.4

This section describes features and system data that are deprecated in this release and planned for deprecation in the future release of Oracle Utilities Application Framework. It contains the following topics:

- [Deprecation in This Release](#)
- [Deprecation Planned for Future Releases](#)

## Deprecation in This Release

The following functionality or system data is deprecated in Oracle Utilities Application Framework Version 25.4:

- [Legacy User Experience \(OPE\)](#)
- [Batch Run Statistics Portal/Sidebar Zone](#)
- [Ability to Switch to the Previous User Experience](#)
- [Message Legacy Page Metadata](#)
- [Display Icon Legacy Page Metadata](#)

### Legacy User Experience (OPE)

Removed the OPE engine and as an alternative to the Redwood user experience.

### Batch Run Statistics Portal/Sidebar Zone

With the introduction of the new **Batch Run** portal, **Batch Day Dashboard** and **Batch Analytics**, the usefulness of the **Batch Run Statistics** zone is limited and was removed from Oracle Utilities Application Framework.

The **Batch Run Statistics** portal provided additional information about batch runs, but some functionality on the portal is related to capturing additional information from an external tool. This information is stored in a Fact record. Support for capturing additional information from an external tool will be discontinued in a future release.

The **Batch Run Statistics** portal was accessible from the original **Batch Job Submission** fixed page. Most functionality in the **Batch Run Statistics** portal is now visible in the **Batch Run** portal. There were additional functionality on the **Batch Run Statistics** portal related to capturing additional information from an external tool. This information is not supported in a future release.

### Ability to Switch to the Previous User Experience

Previously, the product supported the ability to switch from the Opattern Enterprise user experience to the Redwood user experience. Going forward, only the Redwood user experience is supported.

## Message Legacy Page Metadata

Replaced by portal-based user interface.

## Display Icon Legacy Page Metadata

Replaced by portal-based user interface.

## Deprecation Planned for Future Releases

This section lists the functionalities and system data that will be deprecated in the future releases of Oracle Utilities Application Framework:

- [Ability to Log In with SYSUSER](#)
- [Support for Zone Header Map](#)
- [Support for Cube Viewer](#)
- [Support for Guiding Business Process Assistant \(BPA\) Scripts](#)
- [Support for Switch UI View](#)
- [Workflow and Notification Metadata and Database Tables](#)
- [Mobile Application Framework Metadata and Java Packages](#)
- [Key Ring Validation Scripts, Algorithm Types, and Algorithms](#)
- [UI Metadata Related to Converted Pages](#)
- [Miscellaneous System Data](#)
- [XSLT Managed Content Type](#)
- [REST IWS - Original REST Servlet](#)
- [Append Setting from Pagination](#)
- [Support for Master/Subordinate Servers for Web Service Catalog](#)
- [F1-MAINPROC Business Object Read When Pre-processing Exists](#)

## Ability to Log In with SYSUSER

The system provides a user out of the box: SYSUSER. In an upcoming release, the product is going to limit the ability to log in using SYSUSER. Implementations should plan to review all their processes and identify ones where SYSUSER is used for system authentication and authorization and instead define a proper user for the process.

In addition, other system delivered users provided as template users will limit login access in an upcoming release.

## Support for Zone Header Map

Currently all base delivered zone types support a parameter called Zone Header Map, which can be used to override the zone's header area. The reasons for using this may be to have more control over Actions in the header and to be able to suppress the header.

In a future release, we are no longer going to support defining a zone header map. Implementations should review any zones that are currently defining a custom zone header map. If the map is used to implement actions, use the existing zone action parameters to implement this functionality. If the map is used to suppress the header, an upcoming release will provide zone configuration to achieve this functionality.

## Support for Cube Viewer

In the future, the product plans to remove support for the Cube Viewer. Note that this includes support for the F1-COLOR characteristic type that is only used by Cube Viewer. The product uses the F1-Color extendable lookup going forward.

## Support for Guiding Business Process Assistant (BPA) Scripts

In the current release, the product supports guiding BPA scripts that surf on top of one or more application pages and interact with these pages in parallel to script execution. This approach is considered legacy functionality and as such limited to fixed pages. It does not work with portal pages. In the future, the product plans to remove support for such scripts.

## Support for Switch UI View

In a future release, the F1UIVIEW application service related to the function to switch the user interface to an older user experience will be removed.

## Workflow and Notification Metadata and Database Tables

Workflow and notification functionality was an early way to support exchanging messages with an external system (notification) and providing a configurable process for acting on incoming messages (workflow). In more recent years, the functionality for managing external messages is supported using Outbound Message and Inbound Web Service functionality. In addition, there are several features to support processing incoming messages. Service scripts can handle simple use cases. For more complicated processes, the service task or other business object driven objects are available.

The metadata and database tables related to this feature will be removed in a future release. Note that only a portion of the functionality for this feature is managed by Oracle Utilities Application Framework. Most of the functionality is supported in the Oracle Revenue Management and Billing product.

## Mobile Application Framework Metadata and Java Packages

Removal of support for the Mobile Application Framework has already been announced in a previous release. However, there is metadata still included in the application related to this functionality.

The metadata and Java packages will be removed in a future release. CM Java code that references services or methods in the `../mobile/..` package should be reviewed.

## Key Ring Validation Scripts, Algorithm Types, and Algorithms

The product is removing all scripts, algorithm types, and algorithms that performed validation rules on the K1-SignatureKeyRing business object. The algorithms have been removed from the BO configuration. There are requirements to expand the use of a signature key ring beyond the current implementation for object file storage and the existing validations are not applicable to other planned use cases.

The following metadata is no longer in use and will be removed in a future release:

| Object Type    | Object Name             |
|----------------|-------------------------|
| Algorithm      | K1-KRDCKFS, K1-KRINCKFS |
| Algorithm Type | KRDCKFS, K1-KRINCKFS    |
| Message        | 11009 / 1402            |
| Plugin Script  | K1-KRDCKFS, K1-KRINCKFS |
| Service Script | K1-ChkCfgExL            |

## UI Metadata Related to Converted Pages

The UI metadata related to fixed pages that have been converted to portals will be removed in a future release. The navigation keys listed are related to each maintenance page. The related UI program component data will also be removed. Note that the metadata related to the search pages will not be removed at this time in case they are used on other fixed pages.

The following metadata is no longer in use and will be removed in a future release:

| User Interface | Related Metadata                                                                                                                                                                                                                                                                                                             |
|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Script         | <ul style="list-style-type: none"> <li>scriptMaintenanceMainPage</li> <li>scriptMaintenanceStepPage</li> <li>scriptMaintenanceStepAccordion</li> <li>scriptStepSendFieldsGrid</li> <li>scriptStepPromptsGrid</li> <li>scriptStepReceiveFieldsGrid</li> <li>scriptMaintenanceCopyStepPopup</li> <li>scriptDataArea</li> </ul> |

| User Interface          | Related Metadata                                                                                                                                                                                                                                                                                                                                                                                                     |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                         | <ul style="list-style-type: none"> <li>scriptDataAreaGrid</li> <li>scriptSchemaPage</li> <li>scriptMaintenanceEligPage</li> <li>scriptMaintenanceEligCritGrid</li> <li>scriptTree</li> <li>scriptMaintenanceTabMenu</li> </ul>                                                                                                                                                                                       |
| Maintenance Object      | <ul style="list-style-type: none"> <li>maintenanceObjectAlgorithmsGrid</li> <li>maintenanceObjectAlgorithmsPage</li> <li>maintenanceObjectGrid</li> <li>maintenanceObjectTabMenu</li> <li>maintenanceObjectOptionsGrid</li> <li>maintenanceObjectMainPage</li> </ul>                                                                                                                                                 |
| Business Service        | <ul style="list-style-type: none"> <li>businessServiceMainPage</li> <li>businessServiceSchemaPage</li> <li>businessServiceTabMenu</li> </ul>                                                                                                                                                                                                                                                                         |
| Batch Run Portal        | <ul style="list-style-type: none"> <li>batchRunTreeMaint</li> <li>batchRunTree</li> <li>batchRunTreePage</li> <li>batchRunMaintPage</li> <li>batchRunTabMenu</li> </ul>                                                                                                                                                                                                                                              |
| Batch Submission Portal | <ul style="list-style-type: none"> <li>batchSubmitMainPage</li> <li>batchSubmitTabMenu</li> <li>batchJobParmGrid</li> </ul>                                                                                                                                                                                                                                                                                          |
| Business Object Portal  | <ul style="list-style-type: none"> <li>businessObjectAccordionPage</li> <li>businessObjectAccordionPrtPage</li> <li>businessObjectAlgorithmsGrid</li> <li>businessObjectAlgorithmsPage</li> <li>businessObjectLifecyclePage</li> <li>businessObjectMainPage</li> <li>businessObjectOptTypeGrid</li> <li>businessObjectSchemaPage</li> <li>businessObjectStatAlgGrid</li> <li>businessObjectStatTRRuleGrid</li> </ul> |

| User Interface          | Related Metadata                                                                                                                                                                                                                                                                                                                                          |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                         | <ul style="list-style-type: none"> <li>businessObjectStatusOptionGrid</li> <li>businessObjectSummaryOptTree</li> <li>businessObjectSummaryPage</li> <li>businessObjectSummaryUseTree</li> <li>businessObjectTabMenu</li> </ul>                                                                                                                            |
| Lookup Portal           | <ul style="list-style-type: none"> <li>ctLookUpMaintListGrid</li> <li>ctLookUpMaintMainPage</li> <li>Any help navigation keys</li> </ul>                                                                                                                                                                                                                  |
| Algorithm Portal        | <ul style="list-style-type: none"> <li>algorithmMainGrid</li> <li>algorithmMainPage</li> <li>algorithmTab</li> <li>Any help navigation keys</li> </ul>                                                                                                                                                                                                    |
| User Group Portal       | <ul style="list-style-type: none"> <li>userGroupMainPage</li> <li>userGroupProfileGrid</li> <li>userGroupProfilePage</li> <li>userGroupTabMenu</li> <li>userGroupTabMenu2</li> <li>userGroupUserGrid</li> <li>userGroupUserPage</li> <li>Any help navigation keys</li> </ul>                                                                              |
| To Do Entry Maintenance | <ul style="list-style-type: none"> <li>todoEntryCharGrid</li> <li>todoEntryDrillKeyValuesListGrd</li> <li>todoEntrySortKeyValuesListGrid</li> <li>todoentrykeyvalue</li> <li>todoentrymain</li> <li>todoEntryMaint</li> <li>todoEntryPopupAdd</li> <li>todoEntryPopupForward</li> <li>todoEntryPopupSendBack</li> <li>Any help navigation keys</li> </ul> |
| Table Maintenance       | <ul style="list-style-type: none"> <li>metaDataTableFieldsGrid</li> <li>metaDataTableMainPage</li> <li>metaDataTableCFldsGrid</li> </ul>                                                                                                                                                                                                                  |

| User Interface              | Related Metadata                                                                                                                                                                                            |
|-----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                             | <ul style="list-style-type: none"> <li>metaDataTableConstPage</li> <li>metaDataTableMaint</li> <li>metaDataTableRefByConstPage</li> <li>metaDataTableFieldPage</li> <li>Any help navigation keys</li> </ul> |
| Work Calendar Maintenance   | <ul style="list-style-type: none"> <li>workCalendarMaint</li> <li>workCalendarMainPage</li> <li>workCalendarHolidayGrid</li> <li>Any help navigation keys</li> </ul>                                        |
| Message Maintenance         | <ul style="list-style-type: none"> <li>msgMaintDetailsPage</li> <li>msgMaintGrid</li> <li>msgMaintPage</li> <li>msgMaintTabMenu</li> <li>Any help navigation keys</li> </ul>                                |
| Time Zone Maintenance       | <ul style="list-style-type: none"> <li>timeZoneMainPage</li> <li>timeZoneTabMenu</li> <li>Any help navigation keys</li> </ul>                                                                               |
| Application Security Portal | <ul style="list-style-type: none"> <li>f1appsecTabMenu</li> </ul>                                                                                                                                           |
| Display Icon Portal         | <ul style="list-style-type: none"> <li>displayIconRefMaint</li> </ul>                                                                                                                                       |

## Miscellaneous System Data

The following metadata is no longer in use and will be removed in a future release:

| Object       | Data                   | Description/Comments                                                        |
|--------------|------------------------|-----------------------------------------------------------------------------|
| Lookup Value | CHAR_ENTITY_FLG / F1SE | Characteristic Entity / Sync Request Inbound Exception                      |
| Script       | F1-TDMgActSS           | To Do Management – Process Actions (Deprecated) / Replaced by F1TDMgActSS   |
| Script       | F1AddDebugLg           | Add Log for Monitoring Probe (Deprecated) / Replaced by a BS - F1-MONPRBLOG |
| Script       | F1MgOImpMnt            | Not in use by base functionality                                            |
| Script       | F1MgoSqlPks            | Not in use by base functionality                                            |
| Script       | F1MgOImpPst            | Not in use by base functionality                                            |

| Object | Data                           | Description/Comments             |
|--------|--------------------------------|----------------------------------|
| UI Map | F1-MigrObjectImportMaintenance | Not in use by base functionality |
| Zone   | F1-BOMOSRCH                    | Not in use by base functionality |
| Zone   | F1-CATCHSCH                    | Not in use by base functionality |
| Zone   | F1-MONAVKEY                    | Not in use by base functionality |
| Zone   | F1-REVCONQRY                   | Not in use by base functionality |

## XSLT Managed Content Type

Entries in the Managed Content table related to XSL should be using the XSLTC managed content type and not the XSLT managed content type. In a future release, the XSLT managed content type will no longer be supported.

## REST IWS - Original REST Servlet

The original URL supplied for invoking IWS based REST services included the IWS Service name in its makeup. Support for this will continue for backward compatibility purposes, but it will be deprecated in a future release. You should adjust your existing integrations to use the currently supported URL.

## Append Setting from Pagination

There are several known issues with the functionality of the "append" option in pagination. It is recommended that you do not use this pagination setting.

## Support for Master/Subordinate Servers for Web Service Catalog

The Service Catalog Configuration (master configuration) enables you to define subordinate servers. Defining subordinate servers is no longer applicable for the Oracle Integration Cloud.

## F1-MAINPROC Business Object Read When Pre-processing Exists

In the original implementation of configuration tools, the main framework maintenance BPA (F1-MainProc) did not perform a Read of the BO when a pre-processing script was linked to the BO via options. The pre-processing script was responsible for the Read.

In a subsequent release, a BO Read was added in F1-MainProc (even if a pre-processing script existed) to resolve a UI Hint issue related to child business objects. This solution introduced a problem only visible for specific scenarios and a different fix has been introduced. The new fix made the BO Read unnecessary in F1-MainProc. Because there are many pre-processing scripts that are properly performing the Read of the BO, ideally the BO Read should be removed from F1-MainProc so that multiple reads are not performed. However, there may have been pre-processing scripts introduced after the BO Read was included in F1-MainProc that were coded to not perform a BO read in the pre-processing script. Due to this situation, the BO Read is still performed as part of the processing of F1-MainProc.

When a pre-processing script exists, we plan to remove the BO Read from F1-MainProc logic. You should review your custom pre-processing scripts that are linked to your BO options to ensure that they properly perform a Read of your BO.

## Deprecation Notices for ORMB Version 8.1.0.0.0

This section describes features and system data that are deprecated in this release and planned for deprecation in the future release of Oracle Revenue Management and Billing. It contains the following topics:

- [Deprecation in This Release](#)
- [Deprecation Planned for Future Releases](#)

### Deprecation in This Release

The following table lists the objects which are deprecated in Oracle Revenue Management and Billing Version 8.1.0.0.0:

| Object Type      | Object Name                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Batch Control    | GLASSIGN, C1-IAENT, C1-DARSU, BILLING                                                                                                                                                                                                                                                                                                                                                                                                            |
| View             | CI_EFF_ACCT_PRICING_VW, CI_EFF_PER_PRICING_VW                                                                                                                                                                                                                                                                                                                                                                                                    |
| Business Service | C1-EffectivePricing, C1_PriceParmBS<br><div> <b>Note:</b> Instead of using the <b>C1-EffectivePricing</b> business service, use the <b>C1-GetEffectivePricing</b> business service to view the data on the <b>Pricing (Account)</b> and <b>Pricing (Person)</b> screens. Similarly, instead of using the <b>C1_PriceParmBS</b> business service, use the <b>C1_PRICE_PARM</b> business object to add, edit, copy, and delete a parameter. </div> |
| Service Program  | EFFPRCSERVICE, C1_PRICEPARM                                                                                                                                                                                                                                                                                                                                                                                                                      |

### Deprecation Planned for Future Releases

The following table lists the objects which will be deprecated in the future release of Oracle Revenue Management and Billing:

| Object Type           | Object Name                                                                                                       |
|-----------------------|-------------------------------------------------------------------------------------------------------------------|
| Algorithm Type        | C1_CURALG, SA_DERV_POPC, C1-PLASGNAU, C1-PRCASGNAU, C1-PLAUALG, C1-STPFTXINF                                      |
| Algorithm             | C1-PLASGNAU, C1-PRCASGNAU, C1-PLAUALG, C1-STPFTXINF                                                               |
| Feature Configuration | C1_EX_ROUND                                                                                                       |
| Option Types          | Currency Conversion Algorithm and Payment Distribution To-Do (from the <b>C1_MLTCURACC</b> feature configuration) |

| Object Type   | Object Name                                                                                                                                                                                                                                                                                                                         |            |             |             |                                                                                                                             |
|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|-------------|-------------|-----------------------------------------------------------------------------------------------------------------------------|
| Table Columns | <p>The following table lists the columns which will be deprecated in the next release:</p> <table> <tr> <th>Table Name</th><th>Column Name</th></tr> <tr> <td>CI_ACCT_PER</td><td>BILL_RTE_TYPE_CD, RECEIVE_COPY_SW,<br/>BILL_FORMAT_FLG, NBR_BILL_COPIES,<br/>CUST_PO_ID, NOTIFY_SW, and<br/>BILL_ADDR_SRCE_FLG</td></tr> </table> | Table Name | Column Name | CI_ACCT_PER | BILL_RTE_TYPE_CD, RECEIVE_COPY_SW,<br>BILL_FORMAT_FLG, NBR_BILL_COPIES,<br>CUST_PO_ID, NOTIFY_SW, and<br>BILL_ADDR_SRCE_FLG |
| Table Name    | Column Name                                                                                                                                                                                                                                                                                                                         |            |             |             |                                                                                                                             |
| CI_ACCT_PER   | BILL_RTE_TYPE_CD, RECEIVE_COPY_SW,<br>BILL_FORMAT_FLG, NBR_BILL_COPIES,<br>CUST_PO_ID, NOTIFY_SW, and<br>BILL_ADDR_SRCE_FLG                                                                                                                                                                                                         |            |             |             |                                                                                                                             |
| Batch Control | C1-PNDBL, C1-BLGEN, C1-BLPPR                                                                                                                                                                                                                                                                                                        |            |             |             |                                                                                                                             |
| Column        | ADDRESS1, ADDRESS2, ADDRESS3, ADDRESS4, CITY, NUM1, NUM2, COUNTY, POSTAL, HOUSE_TYPE, GEO_CODE, IN_CITY_LIMIT, STATE, and COUNTRY from the CI_PER table                                                                                                                                                                             |            |             |             |                                                                                                                             |
| Table         | CI_PER_ADDR_SEAS                                                                                                                                                                                                                                                                                                                    |            |             |             |                                                                                                                             |

Therefore, we strongly recommend you not to use these objects in any custom implementation.

## Product Documentation

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

- **Oracle Technology Network (OTN)** – You can access the ORMB 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 On-Premises Solution** section. You can view and download a release-specific documentation library by clicking the **View Library** and **Download** links, respectively, corresponding to the respective ORMB version.

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

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

The ORMB OHC page contains a drop-down list which allows you to select the ORMB version for which you want to access the documentation.

### Points to Note:

You can access the documentation of a release prior to 5.0.0.0.0 from OHC by selecting the **Previous Releases** option from the list.

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

From 6.0.0.0.0 release onwards, the Oracle Revenue Management and Billing Online Help (i.e., help.ear file) is not packaged with the application. The ORMB Online Help is published on Oracle Help Center (OHC). You can continue to use context-sensitive help from the application which will point to the respective topic on OHC.

## Technical Support

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For any technical support, consult with Oracle Support, Oracle Partner, or Oracle Consulting that may be supporting your implementation or upgrade process.