

Oracle Utilities Customer to Meter

Release Notes

Release 2.9.0.1.1

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Oracle Utilities Customer to Meter Release Notes

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Preface

This release notes provides an overview of the new functionality, enhancements, known issues, and other changes in Oracle Utilities Customer to Meter V2.9.0.1.1.

The preface includes:

- [Audience](#)
- [Related Documents](#)
- [Updates to Documentation](#)
- [Conventions](#)
- [Acronyms](#)
- [Additional Resources](#)

Audience

Release Notes is intended for anyone installing or using Oracle Utilities Customer to Meter.

Related Documents

For more information, refer to these Oracle documents:

Installation Guides and Release Notes

- *Oracle Utilities Customer to Meter Release Notes*
- *Oracle Utilities Customer to Meter Quick Install Guide*
- *Oracle Utilities Customer to Meter Installation Guide*
- *Oracle Utilities Customer to Meter Database Administrator's Guide*
- *Oracle Utilities Customer to Meter Database Changes Guide*
- *Oracle Utilities Customer to Meter Optional Products Installation Guide*
- *Oracle Utilities Customer to Meter Licensing Information User Manual*

Administrative and Business User Guides

- *Oracle Utilities Customer to Meter Administrative User Guide*
- *Oracle Utilities Customer to Meter Business User Guide*

Supplemental Documents

- *Server Administration Guide*
- *Security Guide*

Updates to Documentation

The complete Oracle Utilities Customer to Meter documentation set is available from Oracle Help Center at <https://docs.oracle.com/en/industries/energy-water/index.html>.

Visit [My Oracle Support](#) for additional and updated information about the product.

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.

Convention	Meaning
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Acronyms

The following acronyms and terms are used in this document:

Acronym	Definition
CCB	Oracle Utilities Customer Care and Billing
C2M	Oracle Utilities Customer To Meter
SOM	Oracle Utilities Service Order Management
SGG	Oracle Utilities Smart Grid Gateway
ODM	Oracle Utilities Operational Device Management
MDM	Oracle Utilities Meter Data Management
OUAF	Oracle Utilities Application Framework

Additional Resources

Additional and updated information about the product is available on [My Oracle Support](#). For more information and support, visit the [Oracle Support](#) website.

Chapter 1

Oracle Utilities Customer to Meter Release Notes

Welcome to the Oracle Utilities Customer to Meter Release Notes. This document provides general information about Oracle Utilities Customer to Meter V2.9.0.1.1 including new functionality, known issues, and other important information.

This guide includes the following:

- [Release Overview](#)
- [Database Changes](#)
- [Enhancements in Oracle Utilities Customer to Meter](#)
 - [Customer Care and Billing Related Enhancements](#)
 - [Meter Data Management and Service Order Management Related Enhancements](#)
 - [Operational Device Management Related Enhancements](#)
- [System Data Details](#)
- [Known Issues in This Release](#)
- [Supported Integrations](#)
- [Demo Data Information](#)
- [Oracle Utilities Application Framework v4.5.0.1.1 Release Notes](#)

Refer to the *Quick Install Guide* and *Installation Guide* for information regarding supported platforms and installation steps.

Release Overview

This section contains general information about this release of Oracle Utilities Customer to Meter v2.9.0.1.1. The release includes the following components:

- Oracle Utilities Customer to Meter v2.9.0.1.1
- Oracle Utilities Application Framework v4.5.0.1.1

Please visit My Oracle Support (<http://support.oracle.com>) and Oracle Software Delivery Cloud (<http://edelivery.oracle.com/>) for the most recent service packs and patches for Oracle Utilities Customer to Meter v2.9.0.1.1 to ensure you have the most current version of this product.

Supported Platforms

See the **Supported Platforms** section in the Oracle Utilities Customer to Meter *Quick Install Guide* (included in this release) for a list of supported platforms.

Supported Upgrades

This version of Oracle Utilities Customer to Meter supports the following upgrade paths:

- From Oracle Utilities Customer to Meter v2.6.0.1.0 to v2.9.0.1.1
- From Oracle Utilities Customer to Meter v2.7.0.0.0 to v2.9.0.1.1
- From Oracle Utilities Customer to Meter v2.7.0.1.0 to v2.9.0.1.1
- From Oracle Utilities Customer to Meter v2.7.0.3.0 to v2.9.0.1.1
- From Oracle Utilities Customer to Meter v2.8.0.0.0 to v2.9.0.1.1
- From Oracle Utilities Customer to Meter v2.9.0.0.0 to v2.9.0.1.1

Addition of Operational Device Management

Oracle Utilities Operational Device Management is included as part of Oracle Utilities Customer to Meter, providing functionality for asset configuration, configuration reports, asset management for devices, and asset replication.

Customers can disable the Oracle Utilities Operational Device Management functionality if desired. Refer to the *Oracle Utilities Customer To Meter Database Administrator's Guide* and the *Oracle Utilities Customer To Meter Installation Guide* for details related to disabling Oracle Utilities Operational Device Management in Oracle Utilities Customer To Meter.

Database Changes

The database changes for the v2.9.0.1.1 release are fully documented in Oracle Utilities Customer to Meter *Database Changes Guide*.

Enhancements in Oracle Utilities Customer to Meter

This section outlines enhancements added in this release of Oracle Utilities Customer to Meter including:

- [Customer Care and Billing Related Enhancements](#)
- [Meter Data Management and Service Order Management Related Enhancements](#)
- [Operational Device Management Related Enhancements](#)

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

Customer Care and Billing Related Enhancements

This section outlines customer care and billing-related enhancements introduced in this release of Oracle Utilities Customer to Meter, including:

- [Customer Information](#)
- [Customer Interactions](#)
- [Credit and Collections](#)
- [DataConnect](#)
- [Device Installation](#)
- [Migration Tools](#)
- [Payment Processing](#)
- [Rating and Billing](#)
- [Start/Stop/Transfer Service Request Processing](#)
- [User Interface Experience](#)
- [Web Services](#)
- [User Experience Enhancements](#)

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

Customer Information

This section describes the new and enhanced customer information features in this release, including:

- [Batch Controls to Update Pending Starting and Pending Stop Service Agreements](#)
- [Customer 360 Portal – New Financial Details Zone](#)

Batch Controls to Update Pending Starting and Pending Stop Service Agreements

These new application-owned batch controls provide you with the capability to update Pending Start and Pending Stop service agreements separately:

- Activate Pending Start SA (C1-ACTSA)
- Finalize Pending Stopped SA (C1-STPSA)

Steps To Enable

To enable the new batch controls, configure or schedule the C1-ACTSA and C1-STPSA batch controls in your batch schedule to process or update Pending Start and Pending Stop service agreements independently.

Customer 360 Portal – New Financial Details Zone

The following tab views have been converted to individual zones and appear in the new tabbed display **Financial Details** (C1-FINDTLTD) zone on the **Customer 360** portal:

- Usage and Billing (converted to zone C1-FDTUSGB)
- Financial History (converted to zone C1-FDTFNHIST)
- Payment Agreement (converted to zone C1-FDTPAYAGR)
- Credit & Collection (converted to zone C1-FDTCRDCOL)

Previously, these tab views appeared in the **Financial Details** (C1-FINDTLS) zone, which has been replaced by the new zone.

Steps To Enable

No steps are required to enable this feature.

Customer Interactions

This section describes the new and enhanced customer interaction features in this release, including:

- [Customer Contact Portals](#)
- [Enhanced Template-Based Notifications](#)
- [Generating a URL to Access a Letter/Bill from an External Source](#)
- [Notification Event Type](#)

Customer Contact Portals

The Customer Contact pages have been converted to portals, leveraging a more flexible and extendable user interface metaphor. Other improvements include:

- Renaming the log entries section to Customer Contact Reminders as this is used to generate To Do Entries for further follow-up action.
- A new Log portal tab to capture log entries making it consistent with other transactional entities.

- Displaying information and Record Actions for a customer contact based on what the customer contact is intended for (for example: sending a letter, recording a template-based outbound notification).
- For template-based outbound notifications, customer contacts can now display additional information including:
 - In the new Notification Details section:
 - Notification Type
 - Customer's Communication Preference and Contact Information
 - Delivery Type (for example, email and SMS)
 - Notification Originating System (for example, Oracle Utilities Network Management System)
 - Integration Status (for example: Pending, Sent, and more)
 - In the new Related Customer Contacts section:
 - Customer contact information for other outbound notifications triggered alongside this customer contact for the same notification event (via a Notification Event Type).

The business object defined on a customer contact's Customer Contact Type controls what is shown for a customer contact. The following new application-owned business objects are defaulted on a Customer Contact Type based on its Contact Action:

- If Contact Action is blank, then the Customer Contact (C1-CustomerContact) business object is defaulted.
- If Contact Action is set to 'Send Letter', then the Customer Contact Letters (C1-CustomerContactLetters) business object is defaulted.
- If Contact Action is set to 'Record Notification' (new), then the Customer Contact – Notification (C1-CustomerContactNotification) business object is defaulted.

Steps to Enable

To enable this feature, refer to the [Setting Up Customer Contact Types](#) section of the Oracle Utilities Customer to Meter *Administrative User Guide* for more information.

Tips and Considerations

1. The following application services were added and therefore you should review and determine which user groups, if any, should be granted access to these application services:
 - Customer Contact Query (C1CUCOQ)
 - Customer Contact (C1CUCO)
2. Note that any existing bookmarks for the Customer Contact page will take the user to the previous version of the page. You need to take the following actions to move the bookmark to the new portal:
 - Click the bookmark. Take note of the Customer Contact ID.
 - Navigate to the **Customer Contact Query** portal.
 - Search and select the Customer Contact from your bookmark. This takes you to the new page.

- Delete the existing bookmark from the **Bookmark** dashboard zone.
 - Click the **Bookmark** button to add a shortcut to this record on the new portal.
3. This feature has introduced the following new business objects (as mentioned above) and algorithms for the CUST CONTACT (Customer Contact) maintenance object:

- Business Objects:
 - Customer Contact (C1-CreateCustomerContact)
 - Customer Contact - Letters (C1-CustomerContactLetters)
 - Customer Contact - Notification (C1-CustomerContactNotification)

These business objects also include the user interface behavior for the new **Customer Contact** portal.

- Determine BO Algorithm:
 - Determine Customer Contact BO (C1CUCNTDETBO) linked to the maintenance object.

If your implementation has introduced your own implementation-specific (or custom) business object(s) and Determine BO Algorithm for the CUST CONTACT (Customer Contact) maintenance object, you should review your business object's configuration and merge it into the applicable application-owned business objects and leverage the application-owned Determine BO Algorithm.

Enhanced Template-Based Notifications

The application-owned Create Template-Based Notification (C1CRETMPLNTP) algorithm type has been enhanced to include the following information on customer contacts that are created for specific types of template-based outbound notifications:

- Person Contact Identifier
- Notification Preference Identifier
- Notification Originating System (for example: Network Management System, Customer Care and Billing)
- Notification Type
- Delivery Type (for example: Email, Fax, IVR, SMS)
- Contact Information
- Customer Contact Status to Pending
- Notification Event Type (for example: Budget Monitor, Budget Review Page)
- Log Entry

Steps to Enable

No steps are required to enable this feature.

Generating a URL to Access a Letter/Bill from an External Source

The following application-owned algorithm types enable you to generate a dynamic URL and directly access a letter or bill stored at an external source (for example, a server) from the **Customer Contact** or **Bill** page:

- Generate Online Bill URL (C1GENBILLURL) for Installation – Online Bill Display plug-in spot
- Generate Online Letter URL (C1GENLTTRURL) for Installation – Online Letter Display plug-in spot

Steps to Enable

To enable this feature, refer to the [Technical Implementation of Online Letter Display](#) and [Technical Implementation of Online Bill Display](#) sections in the *Oracle Utilities Customer to Meter Business User Guide* for more information.

Notification Event Type

The Notification Event Type administration object allows you to specify the type(s) of outbound communication to initiate for a specific triggered action or system event. You may configure the following options:

- Notification Method to define how communication is to be sent
 - Send Digital & Letter
 - Send Letter if No Preference Found
 - Send Digital Only
 - Send Letter Only
- Notification Type to define the type of notification to be used for a digital communication.
- Customer Contact Class and Customer Contact Type to define the type of customer contact to create to send a letter.
- Characteristics for the notification event type.

Steps to Enable

To enable this feature, refer to the [Setting Up Notification Preference Options](#) section of the *Oracle Utilities Customer to Meter Administrative User Guide* for more information.

Tips and Considerations

The following application services were added and therefore you should review and determine which user groups, if any, should be granted access to these application services:

- Notification Event Type MO (C1-NTFEVTTYTYPE)
- Notification Event Type BO (C1-NTFEVTTYTYPEBOAS)
- Notification Event Type (C1NTEVTY)

Credit and Collections

This section describes the new and enhanced credit and collections features in this release, including:

- [Extended Life Support Severance Determination](#)

Extended Life Support Severance Determination

The SA Type - Severance Criteria algorithm type, SV CRIT LS, can now also check if life support requirements exist on any premise records linked to a service agreement's service points. The algorithm type's description and detailed description have been updated accordingly.

You can use the following new algorithms, based on the above algorithm type, to determine if a severance process should be created for a customer that has overdue debt and has not responded to a collection process:

- Check If Person Has Life Support (C1-SVCRIT-LS)
- Check If Premise Has Life Support (C1PREMLSSL)
- Check If Person Or Premise Has Life Support (C1BOTHLSSL)

Steps To Enable

To enable this feature, update SA Types with the applicable severance criteria algorithm(s) where required.

DataConnect

This section describes the new and enhanced DataConnect features in this release, including:

- [Additional Person and Service Agreement Information in Customer Data Extract](#)
- [Customer- and Meter-Related Service Point Identifiers](#)

Additional Person and Service Agreement Information in Customer Data Extract

The Customer Data-related extract enables you to obtain critical customer-related information from Oracle Utilities Customer to Meter and accelerate data distribution to other applications, cloud solutions, and third-party vendors. The extract now includes:

- Additional Person-related information
 - Person Type
 - Business Name
- Additional Service Agreement-related information
 - SA Type Code and Description
 - Special Role Flag and Description
 - CIS Division
 - Business Class Code (Standard Industry Code (SIC))

Steps To Enable

No steps are required to enable this feature.

Customer- and Meter-Related Service Point Identifiers

The following DataConnect extracts include the customer-related and meter-related Service Point identifiers:

- Customer data and SA/SP data related extracts for account data transfer
- SP/Meter Data related extracts for premise data transfer
- Interval related extracts for interval data transfer

Previously, these extracts only provided one Service Point identifier.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

Consider modifying your data mapping or ingest capabilities if your implementation uses these extracts to integrate to other solutions or applications and take into account the new data.

Device Installation

This section describes the new and enhanced device installation features in this release, including:

- [Cross Installed Meter Request Processing](#)

Cross Installed Meter Request Processing

The application-owned Cross Installed Meter (X1-CROSSEDMETER) Process Flow Type, and its associated Cross Installed Meter Request Type (X1-CrossedMeterRequestType), Cross Installed Meter Request (Cross Installed Meter Request), and Cross Installed Meter Action Method (X1-CrossedMeterActionMethod) business objects, provide the means to correct installed meters deployed at incorrect service points.

A process flow efficiently guides you, step by step, through the common steps and actions to handle incorrectly deployed cross installed meters. The supporting capabilities include:

- Locating meter records associated with a cross installed meters scenario.
- Field work integration support
 - Creating field activities to investigate incorrectly installed meters.
- Updating meter installation details, device configurations, and measuring components with the correct information.
- Optional rebilling of affected bill segments using the Off Cycle Bill Generator or creating adjustment(s) for the total rebill amount(s).
- Optional creation of customer contacts to initiate letters to be sent to impacted customers.

A process flow could also be created from a completion event as a result of information received from the field. The application-owned Create Cross Installed Meter Process Completion Event (X1-CreateCrossedMeterProcess) business object may be used to create a process flow when triggered from a field activity's Field Activity Remark.

Steps to Enable

To enable this feature, refer to the [Configuring Cross Installed Meter Processing](#) section of the *Oracle Utilities Customer to Meter Administrative User Guide* for more information.

Tips and Considerations

The following application services were added and therefore you should review and determine which user groups, if any, should be granted access to these application services:

- Cross Installed Meter Bill Correction BO (X1CIMBCBOAS)
- Cross Installed Meter - Action Method BO (X1-CIMACTNMETHDBOAS)
- Cross Installed Meter - Action Processing (X1-CIMACTNPRC)
- Cross Installed Meter - Process Menu (X1-CIMPROMENU)
- Cross Installed Meter - Request BO (X1-CIMRBOAS)
- Cross Installed Meter - Request Type Mgmt (X1-CIMRTMGT)

Migration Tools

This section describes the new and enhanced migration tool features in this release, including:

- [Additional Batch Processes for Migrating Customer Care and Billing Transactional Data](#)
- [Expanded Legacy Data Conversion Batch Processes](#)

Additional Batch Processes for Migrating Customer Care and Billing Transactional Data

In this release, additional data migration-related batch processes enable you to migrate the following Oracle Utilities Customer Care and Billing data to specific Oracle Utilities Customer to Meter objects:

- Applicable Oracle Utilities Customer Care and Billing Field Activities, that are either linked to Service Agreements (via Service Agreement / Service Point relationship) or Severance Events, to Activities using the new Migrate Field Activity (X1-MIGFA) batch control.
- Oracle Utilities Customer Care and Billing Interval Register Data Sets, with a status of 'Complete', and associated Interval Register Data to Measurements using the new Migrate Register Data Set (X1-MIGRD) batch control.
- Oracle Utilities Customer Care and Billing Interval Data Profiles to Measuring Components using the new Migrate Interval Profile (X1-MIGIP) batch control.
- Oracle Utilities Customer Care and Billing Interval Profile Data Sets (with a status of 'Complete') and Related Interval Data to Measurements using the new Migrate Interval Profile Data Set (X1-MIGID) batch control.

The following batch processes have been enhanced to support the above:

- Migrate Admin Data (X1-MIGAD) - Interval Profile Types to Measuring Component Types

- Migrate Service Agreement (X1-MIGSA) - Service Agreement's Interval Profile-related Information to Usage Subscription's Measuring Components

Additionally, the CCB/MDM/ODM Data Migration (X1-AdminDataMigMasterConfig) master configuration provides options for migrating interval profile-related data.

Steps to Enable

To enable this feature, refer to the [Transactional Data Conversion](#) section of the *Oracle Utilities Customer to Meter Administrative User Guide* for more information.

Expanded Legacy Data Conversion Batch Processes

Batch processes based on Oracle Utilities Application Framework-owned algorithms allow you to perform the following data conversion-related tasks:

- Validate data in staging tables
- Assign random, clustered keys to rows in the staging tables
- Resolve legacy keys mapped to an XML storage field with new values assigned during the key assignment task
- Insert rows into production tables from data contained in staging tables
- Validate data in production tables

The following customer-specific maintenance objects are now supported for this release:

- Account (ACCOUNT)
- Adjustment (ADJUSTMENT)
- Bill (BILL)
- Billable Charge (BILL CHARGE)
- Bill Factor TOU Value (BF TOU VAL)
- Bill Factor Value (BF VALUE)
- Bill Review Schedule (C1-BLLRVWSCH)
- Bill Segment (BILL SEG)
- Collection Agency Referral (COLL AGY REF)
- Collection Process (COLL PROC)
- Contract Option (CONTRACT OPT)
- Contract Option Event (COP EVENT)
- Customer Contact (CUST CONTACT)
- Declaration (DECLARATION)
- Device Test (DEVICE TEST)
- Field Activity (FA)
- Field Order (FIELD ORDER)
- Financial Transaction (FT)
- Interval Data Set (INT DATA SET)
- Interval Profile (INT PROFILE)

- Interval Register Data Set (INT REG DS)
- Interval Value (INT VALUE)
- Item (ITEM)
- Landlord Agreement (LANDLORD)
- Market Charge (C1-MKTCHG)
- Market Usage (C1-MKTUSG)
- Market Payment (C1-MKTPMT)
- Meter (METER)
- Meter Configuration (MTR CONFIG)
- Meter Read (METER READ)
- Non-billed Budget SA (NBB SA)
- Payment (PAYMENT)
- Payment Event (PAY EVENT)
- Person (PERSON)
- Premise (PREMISE)
- Service Agreement (SA)
- SA Relationship (SA REL)
- Service Credit Event (SC EVENT)
- Service Credit Membership (SCM)
- Service Point – CCB (SP)
- Severance Process (SEV PROC)
- SP/Item History (SP/ITEM HIST)
- SP/Meter History (SP/MTR HIST)
- Time of Use Map Classic (TOU MAP)
- TOU Data Set (TOU DATASET)
- Usage Trend Table (TREND)
- WF Process (WF PROCESS)
- WO Process (WO PROC)

Steps to Enable

No steps are required to enable this feature.

Payment Processing

This section describes the new and enhanced payment processing features in this release, including:

- [New Account Search Criteria in Payment Event and Payment Quick Add](#)
- [One-Time Payment Processing Enhancements](#)

New Account Search Criteria in Payment Event and Payment Quick Add

You can now use Bill IDs to retrieve Account IDs, to record payment details against, when adding payment(s) for multiple bills. This feature improves the efficiency in capturing payment details on both the Payment Event and Payment Quick Add transactions.

Steps To Enable

No steps are required to enable this feature.

One-Time Payment Processing Enhancements

The Add One-Time Payment window allows you to create a one-time payment event by using a customer's existing payment option(s) and/or entering new payment details. You can open this dialog box from the Add Payment Event menu item of the Main menu or Account context menu, and from the Take a Payment action on the Customer dashboard zone.

Existing payment options are retrieved from a customer's auto pay arrangement on their account and their person self-service payment options. If applicable, you have the option to save new payment details as self-service payment options for future one-time payments. If the bank account captured for new payment details is being used for the first time, web debit account validation will be performed prior to creating the payment event. If you have enabled the web debt account validation functionality, the validation process is managed by a service task governed by the following application-owned business objects:

- C1-OneTimePayTask (One-Time Payment Task)
- C1-OneTimePayTaskType (One-Time Payment Task Type)

Steps to Enable

To enable this feature, complete these steps:

1. Add a Financial Transaction Options configuration (if not existing) using **Feature Configuration**.
2. Set the **Enable Add On-Time Payment UI** value to Y.
3. If the application-owned Add One-Time Payment Navigation (C1OTPayAddNv) script does not meet your requirements, configure the **Override Script for Add One-Time Pmt UI** feature configuration option with an implementation-specific script.

Tips and Considerations

This feature does not capture payment card information for one-time payments. Use a third-party payment processing service provider like Paymentus to process one-time credit card payments.

You can use the Add One-Time BPA Payment (C1OTPayAddMn) BPA script to open the Add One-time Payment window from implementation-specific zones, contextual insights, process flow panels, and other locations.

Rating and Billing

This section describes the new and enhanced rate and billing features in this release, including:

- [Automated Budget Review/Approval and Customer Notification](#)
- [Usage Request - Multi Time Zone Support](#)

Automated Budget Review/Approval and Customer Notification

The following batch control, algorithm type, portal, algorithm, and other described changes allow you to optionally automate the budget review and approval process for applicable customer accounts.

Enhanced Monitor Budgets Batch Control

The Monitor Budgets (BUDMON) batch control has been enhanced to be plug-in driven to make it more consistent with other recently released batch controls. This batch control monitors customer accounts with a budget plan by calling the Monitor Algorithm on an account's Budget Plan. You can also select or filter customer accounts to be monitored using the following new optional batch parameters:

- CIS Division
- Customer Class
- Budget Plan

The batch control may also undertake additional processing if indicated by a Budget Plan's Monitor Algorithm (for example, automatically update an account's budget details) and optionally initiate an outbound communication to send to the customer. Outbound communication is enabled by configuring a Budget Monitor Notification Event Type.

New Budget Plan – Budget Monitor Algorithm Type

The application-owned Budget Plan – Budget Monitor algorithm type, Monitor with Automated Update Option (C1BUDMNAUO), can be used to compare an account's current budget with its recommended budget. An algorithm, based on this algorithm type, is called by the Monitor Budgets (BUDMON) batch control if defined on an account's Budget Plan and determines whether:

- The account's budget details should be automatically updated.
- The account is highlighted for manual review by a Budget Review entry on the **Budget Review** portal.
- No action is required.

The determination of which action to perform is based on whether the recommended budget for an account falls within or outside specific tolerances when compared to the account's current budget.

Budget Review Portal

The **Budget Review** page has been converted to a portal, leveraging a more flexible and extendable user interface metaphor. You can now locate customer accounts to review using the following filters:

- Account ID
- Budget Plan

- CIS Division
- Customer Class
- On or Before Review Date

The following information is displayed for each applicable Budget Review entry:

- Account information
- Account ID
- Budget Plan description
- Review Date
- Next Bill Date
- Current Budget (renamed from Total Budget Amount)
- Recommended Budget (renamed from Suggested Budget Amount)

If, after review, you determine the budget details do not need to be updated for an account or group of accounts, you can select the applicable rows and click the **Worked** button.

Note: By default, only Budget Review entries that are marked as not worked are displayed. However, you can use the **Include Worked** checkbox to display a worked Budget Review entry for a specific account.

You can also initiate updating the budget details for an account from the **Budget Review** portal. By clicking the **Edit** icon, the **Update Account Budget** screen is launched displaying the following:

- Account information
- Budget Plan description
- New date for recommended budget (may be manually updated)
- Current budget for the account
- Total recommended budget for the account (based on recommended budget amounts for applicable service agreements)
- For each applicable service agreement:
 - Service agreement information
 - Last budget changed date
 - Current budget
 - Recommended budget (may be manually updated)

After clicking the **Save** button, the account's budget details are updated and an outbound communication initiated to send to the customer (optional).

- If changes to an account's budget are successfully made, the Budget Review entry will be marked as *Worked*.
- Outbound communication is enabled by configuring a Budget Review Page Notification Event Type (optional).

New Notification Type – Template Data Algorithm

The application-owned Notification Type – Template Data algorithm, Budget Notification Template Data (C1BUDNFTMPD), can be used on applicable template-based Notification Types to build outbound notifications to notify customers of changes to their account's budget details.

Account – Budget Tab Label Updates

The following labels have been renamed to more accurately reflect what they are used for:

- Total Budget Amount to Current Account Budget
- Total New Budget to Recommended Account Budget
- Budget Amount to Current Budget
- New Budget to Recommended Budget

Steps to Enable

To enable this feature, complete these steps:

1. Configure, if required, template-based Notification Type(s) for notifying customers of changes to their account budget details. You can also leverage the application-owned Budget Notification Template Data (C1BUDNFTMPD) Notification Type – Template Data algorithm if it meets your implementation-specific requirements.
2. Configure, if required, Customer Contact Class(es) and / or Customer Contact Type(s) for customer contacts to be created to generate letters to notify customers of changes to their account budget details.
3. Configure or update, if required, Characteristic Types to be defined on Notification Event Types.
4. Configure, if required, Notification Event Types for Budget Monitor and/or Budget Review Page initiated budget updates for notifying customers of changes to their account budget details.
5. Configure or update applicable Budget Plans with Monitor Algorithms based on the application-owned Budget Monitor with Automated Update Option (C1BUDMNAUO) algorithm type if it meets your implementation-specific requirements.
6. Configure or schedule the Monitor Budgets (BUDMON) batch control to be run at implementation-specific defined intervals in your batch schedule.

Tips and Considerations

1. The following application service was added and therefore you should review and determine which user groups, if any, should be granted access to this application service:
 - Budget Review (C1BUDRVW)
2. Update implementation-specific or custom Java Budget Plan – Budget Monitor algorithm type(s) to include the API for the new Budget Monitor Action output of the Budget Plan - Budget Monitor algorithm plug-in spot.
3. Your implementation can define custom actions related to monitoring budgets by:
 - Adding implementation-specific values to the Budget Monitor Action Flag (BUDGET_MON_ACTION_FLG) Lookup.

- Configuring implementation-specific Budget Plan – Budget Monitor algorithm type(s) / algorithm(s) to compare an account's current budget with its recommended budget and determine the custom action(s) to be taken.
 - Configure or update applicable Budget Plans with your implementation-specific monitor algorithm(s).
 - Configuring implementation-specific Batch Control – Process Record algorithm type / algorithm to process each customer account with a budget plan incorporating your custom actions.
 - Duplicate the Monitor Budgets (BUDMON) batch control and replace the existing application-owned Batch Control – Process Record algorithm with your implementation-specific Batch Control – Process Record algorithm.
 - Configure or schedule your implementation-specific Monitor Budgets batch control to be run at implementation-specific defined intervals in your batch schedule.
4. You can reference the **Update Account Budget** screen throughout the application, for example as an action for contextual insights.

Usage Request - Multi Time Zone Support

The multi-time zone support for usage requests ensures that you bill your customer correctly when their premise is located in a time zone that is different from the time zone defined on the **Main** tab of the **Installation Options - Framework** portal. Additionally, multi-time zone sensitive date and time values of a usage request (for example, interval processing period and scalar read period) appear in the premise's time zone.

Steps To Enable

To enable this feature, complete these steps:

1. Click **Admin, General, and Feature Configuration**.
2. Add a System Configuration feature configuration if one does not exist.
3. Configure the **Customer Multi Time Zone Support** option to *Y*.
4. Configure the **Multi Time Zone Support - MDM** option to *DAYS*.

Start/Stop/Transfer Service Request Processing

This section describes the new and enhanced start, stop, and transfer service request features in this release, including:

- [Agent-Assisted Appointment Scheduling for Start/Stop Service](#)

Agent-Assisted Appointment Scheduling for Start/Stop Service

Process flows for managing start, stop, and transfer service requests, based on the application-owned Process Flow Types, now display an insight on the **Review and Submit** panel to highlight when a customer requires one or more appointments for field work for starting or stopping services at a premise. You can click the Schedule button on the insight to open the **Account Appointment** portal and easily book appointments.

The **Account Appointment** portal provides the following zones:

- **Account Activities** - Displays field work activities related to the customer's account.
- **Appointment Booking Results** - Displays the available slots as returned by the field work system for a selected field work activity (for example, Oracle Field Service Cloud) and allows you to book a specific appointment slot.
- **Activity Summary** - Displays field work activity details.

The following can highlight when an account requires appointments and navigate you to the **Account Appointment** portal:

- Insight Type
 - Highlight Field Activities Requiring Appointment – List (C1-FAREQAPT-LIST) - Displays the appropriate insight in the **Customer Insights** zone on the **Customer 360** portal.
- Installation - Control Central Alert Algorithm
 - Highlight Field Activities Requiring Appointment (C1FAREQAALRT) - Displays a message in the **Alerts** zone.

Steps to Enable

No steps are required to enable this feature.

Tips and Considerations

Optional. If you use the **Alerts** zone, plug in the Highlight Field Activities Requiring Appointment (C1FAREQAALRT) algorithm into the Control Central Alert System Event on **Installation Options - Framework**.

Optional. If you use the **Customer 360** portal, configure the Highlight Field Activities Requiring Appointment – List (C1-FAREQAPT-LIST) insight type on the Insight Group related to the Insight Class of Customer Insights.

User Interface Experience

This section describes the new and enhanced user interface experience features in this release, including:

- [Service Order Management Information Zone - Additional Hyperlinks](#)

Service Order Management Information Zone - Additional Hyperlinks

The Service Order Management Information (C1-FA-SRINFO) zone now provides a link for the following that may appear in the tree:

- Non-orchestrator related activities
- Completion events
- Outbound communications
- Inbound communications

In previous releases, a link was only provided for the orchestrator activity (for example, enable service).

Steps to Enable

No steps are required to enable this feature.

Web Services

This section describes the new and enhanced web services features in this release, including:

- [Additional and Enhanced REST APIs for the Integration Suite Web and/or Customer Experience Web Service Categories](#)
- [Additional REST APIs for Other Web Service Categories](#)

Additional and Enhanced REST APIs for the Integration Suite Web and/or Customer Experience Web Service Categories

These new REST API Inbound Web Services expose various customer-related entities and data, and provide the capability to create, manage, and view that data:

- C1-AccountData (Account Financial Data) - Shows how an account's current and payoff balance has changed over time, by returning the financial transactions for the account. This also retrieves various summary calculations and provides statistical data per billing account or multiple accounts for a given date range.
- C1-BillingContext (Billing Context) - Represents a billing context for various types of queries or searches (for example, accounts associated with a specific person record).
- C1-BilledUsageData (Usage Data from Bills) - Retrieves summarized billed usage and specific bill segment-related details for a given date range.
- C1-BusinessSearch (Business Search) - Supports business record queries by various criteria.
- C1-PersonSearch (Person Search) - Supports person record queries by various criteria.
- C1-SADData (SA Data) - Retrieves a list of unit of measures and some financial-related information (for example, current balance, last billed date, and last billed amount) for a service agreement.

The following updated REST API Inbound Web Services also expose various customer-related entities and data, and allow you to manage that data:

- C1-Adjustment (Adjustment) - Retrieves adjustment summary information.
- C1-Bill (Bill) - Returns a set of bills for an account with summary details for each bill.
- C1-BillSegment (Bill Segment) - Retrieves pertinent details for a single bill segment (for example, calculation lines) but excludes meter reading and financial transaction-related information. Updated search operation by adding capability to find bill segments by premise address, rate, or bill segment amount.
- C1-Case (Case) - GET search method updated to the POST method.
- C1-NotificationPreferencesForAccounts (Notification Preferences for Accounts) - Sends additional notification-related information including time zone and appending a default country calling code to a customer's retrieved

phone number. Standardizes element names to maintain consistency with other inbound web services.

- C1-Payment (Payment) - Retrieves payment summary information.
- C1-ServiceAgreement (Service Agreement) - Searches and retrieves service agreement information under a billing account along with its associated premise information.

The following REST API Inbound Web Services no longer support the POST method:

- C1-Adjustment (Adjustment)
- C1-CollectionProcess (Collection Process)
- C1-SeveranceProcess (Severance Process)
- C1-WriteOffProcess (Write Off Process)
- C1-CutProcess (Cut Process)
- C1-OverdueProcess (Overdue Process)

The following REST API Inbound Web Services no longer supports the PUT method:

- C1-Adjustment (Adjustment)
- C1-Bill (Bill)
- C1-BillSegment (Bill Segment)
- C1-PaymentTender (Payment Tender)
- C1-Payment (Payment)
- C1-PaymentEvent (Payment Event)
- C1-PayPlan (Pay Plan)

The following REST API Inbound Web Service enables the retrieval of child collections from the parent record:

- C1-Payment - Separate GET method to retrieve payment segments

The following REST API Inbound Web Services provide standardized PATCH method for updating the status of related transactional records:

- C1-Adjustment (Adjustment)
- C1-Bill (Bill)
- C1-BillSegment (Bill Segment)
- C1-Case (Case)
- C1-Payment (Payment)
- C1-PaymentEvent (Payment Event)
- C1-PaymentTender (Payment Tender)

Steps to Enable

To enable this feature, refer to the *Oracle Utilities REST API for Metering and Customer Information* documentation.

Additional REST APIs for Other Web Service Categories

The following new REST API Inbound Web Services expose various customer-related entities and data, and provide the capability to create, manage, and view that data:

- C1-CustomerContactNotification (Create / Update Customer Contact) - Creates or updates a customer contact record.
- C1-TemplateBasedNotifTypes (Template Based Notification Types) - Retrieves subscription information and individual push template-based notification types.
- C1-UnsubscribeNotifications (Unsubscribe Notifications) - Retrieves and deactivates notification communication preference(s).
- C1-UpdateServiceCallCommunication (Update Service Call Communication) - Updates service call communication.

Steps to Enable

To enable this feature, refer to the *Oracle Utilities REST API for Metering and Customer Information* documentation.

User Experience Enhancements

This section describes the new and enhanced user experience features in this release, including:

- [Menu and Menu Item Security](#)
- [Pagination, Sort Order, and Data Export](#)

Menu and Menu Item Security

In this release, the asset-related application services and access modes used by BPA scripts to determine or grant permissions on objects now applies to menu items. Users without the appropriate permissions will no longer encounter errors or inaction after clicking a menu item.

This provides a better user experience by displaying only the menu items to which the user has access to the underlying BPA action.

Steps to Enable

No steps are required to enable this feature.

Pagination, Sort Order, and Data Export

In this release, the following portals support pagination, selectable sort order, and data export to Excel:

- Asset
- Asset Location

These features provide a better search experience, which allow you to quickly find work- and asset-related information.

Steps to Enable

No steps are required to enable this feature.

Meter Data Management and Service Order Management Related Enhancements

This section outlines meter data management, service order management, and smart grid gateway related enhancements introduced in this release of Oracle Utilities Customer to Meter, including:

- [User Experience Enhancements](#)
- [Usage Calculation and Measurement Processing Enhancements](#)
- [Integration and Data Extract Enhancements](#)
- [Smart Grid Gateway Enhancements](#)

User Experience Enhancements

This section describes the new and enhanced user experience features in this release, including:

- [Operational Dashboard Filter](#)
- [Meter Health Check](#)

Operational Dashboard Filter

In this release, the following zones on the Meter Operational Dashboard allow you to filter data by Division Code:

- Incomplete IMDs by Status
- Incomplete IMDs Trend
- VEE To Dos by Exception Type
- VEE To Dos Trend
- Usage Transaction by Status
- Usage Transaction Trend
- Usage Transaction To Dos by Exception
- Usage Transaction To Dos Trend

The new filter helps reduce clutter and irrelevant data in the dashboards.

Steps to Enable

To enable this feature, turn on Division Security in Master Configuration and set up the users' default divisions.

Meter Health Check

You can check the health of the system or monitor the state of the environment through accessing the different dimensions of meter data, such as the count of Initial Measurement Data records by:

- Status: Pending, Error, and so on
- Type: scalar and interval

- Counts, averages and total

You can collect a set of data points over time to track the health of environment regularly and take appropriate actions. The tool also enables you to export data or results in Microsoft Excel or in printed formatted.

Steps to Enable

To enable this feature, refer to the **Configuring the Meter Health Check Dashboard** section of the Oracle Utilities Customer to Meter *Administrative User Guide* for more information.

Usage Calculation and Measurement Processing Enhancements

This section describes the new and enhanced usage calculation and measurement processing features in this release, including:

- [Initial Measurement Data Monitor Batch Controls](#)
- [Usage Calculation Rule - Demand at Service Point Level](#)
- [Usage Calculation Rule - Rolling Demand](#)
- [Updated Initiation for Measurement Reprocessing](#)
- [Non-final Initial Measurement Data Self-service Removal Tool](#)

Initial Measurement Data Monitor Batch Controls

The following Initial Measurement Data (IMD) Monitor batch controls minimize performance issues when adding large numbers of historical or backlog readings. These use the IMD as the processing work unit instead of the Device Configuration. This prevents situations in which an error on an IMD rolls back processing for all of the IMDS for a given device configuration. These include:

- D1-IMDV2 (IMD Monitor - Physical Devices V2): used to process initial measurements related to physical devices.
- D1-IMDD2 (IMD Monitor - Deferred IMDs V2): used to process previously held or deferred IMDs.
- D1-IMDM2 (IMD Monitor - Unattached MCs V2): used to process IMDs for standalone measuring components without a Device Configuration such as weather or price data.

In addition, these batch controls provide more frequent commits that:

- Ensure consistent records per second processing
- Preserve process during a thread shut down
- Isolate failures to a single IMD

Steps to Enable

No steps are required to enable this feature.

Tips and Considerations

The D1-IMDV2 batch control invokes monitoring rules associated with the current state of an Initial Measurement Data (IMD). All monitoring rules throughout the IMD's business object's inheritance chain are considered.

The D1-IMDV2 batch parameters govern whether the processing is further restricted by batch code, business object, status, and so on.

The D1-IMDV2 batch process is based on the standard monitor process. However, it does not need to be plugged in on a state of the IMD business objects as a "Monitor Process". You do not need to change your IMD business objects to reference this new batch control.

The D1-IMDV2 batch parameter "runAsBatchCode" can be used to process records where the current status is governed by "Run as Batch Control" when the parameter is not plugged in as a Monitor Process. For example, if there is an IMD in PENDING where the BO status is configured with a "Monitor Process" of D1-IMD then setting the "Run as Batch Control" to D1-IMD will allow this batch control to transition that record.

The D1-IMDV2 batch control processes all IMDs for a Measurement Component up to and including that limit and each additional IMD will be held if the optional parameter for Measuring Component IMD Limit is configured. For the held IMDs, there are some optional behaviors:

- A To Do entry can be created for each Measurement Component with more than the configured limit of IMDs. Note that only one To Do entry per Measurement Component is created even if there is more than one IMD over the limit.
- The IMDs over the limit can be transitioned to a new status to remove these from the normal processing flow. This ensures these are not picked up on a subsequent run of the D1-IMDV2 batch control and that these must be processed using the D1-IMDD2 batch control.

Usage Calculation Rule - Demand at Service Point Level

The "Coincident Peak and Individual SP Demand" usage calculation rule enables you to determine demand at the service point level based on:

- Individual Service Points
- Coincident Peaks
- Time-of-Use (TOU) Coincident Peaks

Previously, demand was only calculated at the subscription level.

Steps to Enable

To enable this feature, refer to the [Usage Calculation Rules](#) section of the *Oracle Utilities Customer to Meter Administrative User Guide* for more information.

Usage Calculation Rule - Rolling Demand

The Rolling Demand usage calculation rule allows you to support meters that record intervals at one interval length (for example, a 15 minute interval) and tariffs that require demand values to be calculated at higher interval lengths (for example, 30 minute intervals). This allows you to bill rolling demand in a standardized way across various interval rates.

Steps to Enable

No steps are required to enable this feature.

Updated Initiation for Measurement Reprocessing

Measurement Reprocessing is initiated when install event dates change. Previously, measurement reprocessing was only initiated when the installation constant was changed. When the installation and removal dates expand to cover a longer time, this process checks for existing measurements that require a change in multiplier and reprocessing.

Steps to Enable

No steps are required to enable this feature.

Non-final Initial Measurement Data Self-service Removal Tool

You can identify and remove unnecessary Initial Measurement Data (IMDs) in "non-final" status with a self-service tool that enables you to filter IMDs by date range, business object, business object status, and device configuration. This allows you to perform quick data cleanup and reduces manual record deletion.

Steps to Enable

No steps are required to enable this feature.

Integration and Data Extract Enhancements

This section describes the new and enhanced integration and data extract features in this release, including:

- [DataConnect Interval AMI Extract - Additional Data](#)
- [Measurement and Initial Measurement Data Header Extract-related Batch Processes](#)

DataConnect Interval AMI Extract - Additional Data

The "Interval AMI" DataConnect data extracts now include the following data:

- Service Quantity Identifier
- Time of Use
- Service Type
- Device Id (meter number (customer-facing))

These extracts can be used for Opower integration or as integration to other energy management systems. These provide more detailed interval data extracts. It also reduces project cost and configuration time.

Steps to Enable

To enable this feature, refer to the **Defining DataConnect Options** section of the *Oracle Utilities Customer to Meter Administrative User Guide* for more information.

Measurement and Initial Measurement Data Header Extract-related Batch Processes

These batch controls streamline the initial export of Measurement data and Initial Measurement Data (IMD) header data:

- Specialized IMD Header Initial Extract (D1-SIMDI) - Extracts IMD headers of IMDs whose "To" date/time are later than the Start Date/Time and equal or earlier than the End Date/Time
- Specialized Measurement Initial Extract (D1-SMDIE) - Extracts measurements whose Measurement date/time are later than the Start Date/Time and equal or earlier than the End Date/Time

Additionally, you can extend the default SQL Timeout value (900 seconds) of the Specialized IMD Header Extract Current (D1-SIMDC) or Specialized Measurement Extract Current (D1-SMDECS) batch control with the "Override SQL Timeout" parameter.

Steps to Enable

No steps are required to enable this feature.

Smart Grid Gateway Enhancements

This section describes the new and enhanced smart grid gateway features in this release, including:

- [Generic Common Information Model \(CIM\) Adapter](#)
- [Unit of Measure Filtering for On-Demand Reads](#)
- [Generic CIM AMI Adapter - On-Demand Read and Device Status Check Commands](#)

Generic Common Information Model (CIM) Adapter

The Adapter Development Kit provides you with Common Information Model (CIM) IEC 61968-9, Edition 2.0 interfaces for file-based processing of usage and events, and a real time interface for events.

This provides productized CIM file-based processing of usage and events, and a real-time interface for events. It also reduces project time and costs when working with CIM head-end systems.

Steps To Enable

To enable this feature, complete these steps:

1. Add the ADK - Master Configuration and enter the details to support the real-time event interface.
2. Add a Usage and Events entries for the SGG Payload Processing Configuration extendable lookup to leverage the `com.splwg.d1.domain.sgg.dg.processing.PayloadHandlerViaUserExits` payload handler class.
3. Add two batch controls using D1-PLPRM (Payload Processing Monitor Template) and associate these with the appropriate SGG Payload Processing Configuration extendable lookup values.
4. Update the ADK - UOM Code to Standard UOM mapping extendable lookup with the mapping for the ReadingType values. These should map to UOM, TOU, and SQI where applicable.

5. Update the ADK - Device Event Mapping extendable lookup with configuration for the event types that will be processed.
6. Add an entry to the File Storage Configuration extendable lookup indicating where the real-time event processing will store and receive files.
7. Create a head end system with the appropriate processing roles to process initial measurement data and events.

Unit of Measure Filtering for On-Demand Reads

The application provides Unit of Measure (UOM) filtering for on-demand read commands for the following Smart Grid Gateway adapters:

- Landis+Gyr
- Itron AMM (formerly Silver Springs Networks)
- Adapter Development Kit

These UOM filters minimize IMD Seeder errors on devices where UOMs are not configured as measuring components.

Steps to Enable

No steps are required to enable this feature.

Generic CIM AMI Adapter - On-Demand Read and Device Status Check Commands

In this release, the Adapter Development Kit includes on-demand read and device status check commands based on the Common Information Model (CIM) IEC 61968-9, Edition 2.0 standard. This provides support for the CIM standard and a framework for other commands. It also reduces project time and costs when working with CIM head-end systems.

Steps To Enable

To enable this feature, refer to the **Adapter Development Kit - Common Information Model Commands** section of the *Oracle Utilities Smart Grid Gateway Administrative Guide* for more information.

Operational Device Management Related Enhancements

This section outlines relevant operational device management-related enhancements introduced in this release of Oracle Utilities Customer to Meter, including:

- [Asset Management Enhancements](#)

Asset Management Enhancements

This section describes the new and enhanced asset management features in this release, including:

- [Failure and Downtime Service Histories](#)
- [Framework Wrapper-Based Asset Location and Organization Tree Views](#)
- ["Question" Label Renamed](#)

Failure and Downtime Service Histories

Oracle Utilities Customer to Meter and Oracle Field Cloud Service support the following:

- Creation of failure and downtime service histories
- Passing of valid failure and downtime information to external systems
- Creation of failure and downtime service histories from Oracle Field Service

Additionally, the **Asset Type** portal maintains the list of valid failure and downtime information shared with the service order management application component.

Steps to Enable

To enable this feature, complete these steps:

1. Define Failure Profiles, refer to the **Defining Failure Profiles** section of the *Oracle Utilities Customer to Meter Administrative User Guide* for more information.
2. Use these sections of the **Asset Type** portal to add the information shared with the service order management application component:
 - **Valid Service History Types** - Service history types and failure information
 - **Asset Management** - Failure profiles

Framework Wrapper-Based Asset Location and Organization Tree Views

The **Asset Location**, **Asset**, **Organization**, and **Out of Service Location** tree views now allow you to expand the tree view up to 15 levels, but the ability to broadcast Asset Locations to display all the installed assets is no longer available.

You can configure Framework wrapper-based tree views to be up to 15 node levels.

Steps to Enable

No steps are required to enable this feature.

"Question" Label Renamed

In this release, the Question label for maintenance and search portals, menu items, and the Question maintenance object has been changed to Service History Question to distinguish it from a similarly named field.

This renaming prevents potential confusion arising from the introduction of a new Question entity related to questions for Customer Service Representatives to ask customers.

Steps to Enable

No steps are required to enable this feature.

System Data Details

Refer to the **System Data Details** sections in the following documents for information about new and updated system data delivered in this release of Oracle Utilities Customer to Meter that may need to be reviewed for possible impact by implementations:

- *Oracle Utilities Customer Care and Billing v2.9.0.1.1 Release Notes*
- *Oracle Utilities Meter Data Management v2.5.0.1.1 Release Notes*
- *Oracle Utilities Operational Device Management v2.4.0.1.1 Release Notes*

Known Issues in This Release

Following are the known issues in Oracle Utilities Customer to Meter at the time of this release:

Name	Description	Workaround
Conversion	The conversion tool's validation of objects maintained in a list maintenance, such as UOM, will always return an error and should instead be validated using SQL queries. This is due to the objects still having old-style all-in-one maintenance services. Conversion of these maintenance services will be considered for a future release.	Use SQL queries to validate the objects maintained in a list maintenance.

Supported Integrations

The following integrations are supported in this version of Oracle Utilities Customer to Meter.

Note: Version numbers listed below are supported as of the v2.9.0.1.1. release (April 2023). Refer to the Certification Matrix for Oracle Utilities Products (Document ID 1454143.1) on My Oracle Support to

determine if support for newer versions of the listed products have been added.

Oracle Utilities Product Integrations

- C2M V2.9.0.1.1 to Oracle Utilities Network Management System V2.4.0.x, or V2.5.0.x

Other Integrations

Refer to the **Supported Integrations** sections in the following documents for information about other integrations that are supported in this version of Oracle Utilities Customer to Meter:

- *Oracle Utilities Customer Care and Billing v2.9.0.1.1 Release Notes*
- *Oracle Utilities Meter Data Management v2.5.0.1.1 Release Notes*
- *Oracle Utilities Operational Device Management v2.4.0.1.1 Release Notes*

Demo Data Information

The application delivers a demo database based on the application versions provided with the release, including Oracle Utilities Application Framework. Demo data provides sample configuration and data for key application features.

Demo data is included in the package and includes its own installation instructions. Please refer to the *Oracle Utilities Customer To Meter Database Administrator's Guide* for more information or contact Oracle Support.

Oracle Utilities Application Framework v4.5.0.1.1 Release Notes

This section describes enhancements, system data details and deprecation notices in Oracle Utilities Application Framework v4.5.0.1.1 including:

- [Application Security](#)
- [Product Usability](#)
- [Data Export](#)
- [To Do Management and Processing Enhancements](#)
- [Batch Processing Enhancements](#)
- [Implementation Tool Enhancements](#)
- [Content Migration Assistant \(CMA\)](#)
- [Miscellaneous Enhancements](#)
- [Oracle Utilities Application Framework Deprecation Notices](#)

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

Application Security

This section describes the new and enhanced application security features in this release, including:

- [Detailed Description Added to Application Service](#)
- [Screen Information Hidden on Session Timeout](#)

Detailed Description Added to Application Service

Detailed Description was added as an optional attribute for application services. For most product delivered application services, the **Secured Objects** zone, which highlights which metadata objects in the system are linked to the application service, provides enough information to security administrators for them to understand what features are controlled by this record. There are a small number of application services that are referenced from JavaScript or Java, which are not discoverable by the **Secured Objects** zone. For these types of application services, a detailed description helps provide more information about the purpose and use of the record. For these examples and any other use case where the product has determined that additional information is warranted, the detailed description for such application services includes a detailed description.

Steps To Enable

No steps are required to enable this feature.

Screen Information Hidden on Session Timeout

When a user's session times out, the underlying page is changed so that the underlying information is no longer visible. The user sees an alert that the session has timed out and they should click **OK** to log into the application again.

This ensures that possibly sensitive information is no longer visible.

Steps To Enable

No steps are required to enable this feature.

Product Usability

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

- [Algorithm Portal](#)
- [Application Security Query Portal](#)
- [Application Service Query Portal - Search by Release Version](#)
- [Characteristic Type Portal - Support Large Number of Characteristic Values](#)
- [Currency External Reference](#)
- [Currency Portal](#)
- [Dashboard Location Values Adjustment](#)
- [Display Icon Portal](#)
- [Geographic Type Portal](#)
- [Improved Field Portal](#)
- [Inbound Web Service Query Portal - Additional Search Options](#)
- [Language Portal](#)
- [Lookup Portal](#)
- [Menu Portal](#)
- [Online Help Opens in Oracle Help Center for Oracle Utilities Application Framework-based Applications](#)
- [Phone Type Portal](#)
- [Shortcut Key for Navigating Multiple Tabs Adjusted](#)
- [Unified Search Improvements](#)
- [User Group Portal](#)
- [Work List Zone - Improved Item Navigation](#)

Algorithm Portal

The **Algorithm** page has been converted to a portal, leveraging a more flexible and extendable user interface metaphor. The portal includes a **References** tab that list all entities associated with an algorithm. Knowing where an algorithm is used provides you with a better view of your custom rules and will help you target your testing. This portal improves efficiency for building and maintaining algorithms for developers without impacting extensions.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

A new business object (BO) for Algorithm 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
Algorithm Portal	F1ALG	CILTALGP

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 Algorithm.
2. Navigate to the **Algorithm** portal page via the menu.
3. Search for and select the Algorithm 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.

Application Security Query Portal

While application security can be configured at the granular level of an application service and its access modes, it is more intuitive to review access rights to broader application components such as menu lines, dashboard zones, batch processes, and more. A new **Application Security Query** portal supports various options for reviewing this configuration across users, user groups, and various types of secured components. This portal improves efficiency for building and maintaining security without impacting customizations.

Steps To Enable

To enable this feature, provide access to the Application Security Query (F1APSECQ) application service.

Key Resources

See the [Security Enhancements](#) training.

Application Service Query Portal - Search by Release Version

The **Application Service Query** portal is enhanced to support a new query option that lists application service by the release they were introduced in. The recording of this information is only available from this release going forward, so it is only applicable to

new application service going forward. This makes the uptake step of reviewing new application services easier. This change is transparent to customizations as it improves efficiency for building and maintaining security.

Steps To Enable

No steps are required to enable this feature.

Key Resources

See the [Security Enhancements](#) training.

Characteristic Type Portal - Support Large Number of Characteristic Values

The maintenance of the list of characteristic values for a pre-defined characteristic type has been moved to a separate zone on the portal rather than a list built into the main section. The new zone better handles use cases where a large number of characteristic values exist. The zone includes paging and supports filters for more easily finding and maintaining individual entries.

View and maintain characteristic values for a pre-defined characteristic type in a separate zone with filters and paging support.

Steps To Enable

No steps are required to enable this feature.

Currency External Reference

Note: This feature is only an infrastructure change, allowing for edge products or implementations to choose to add support for currencies that are more than three characters. There is no additional functionality provided by the product for this feature.

There is a new external reference column in the Currency table. This allows implementations to define currencies that use a currency code that is more than three characters. This may be required to support crypto currencies with codes of more than three characters. Internalization currencies and the product's current code field are still three characters.

Be aware of the following:

- The currency table still limits the primary key of currency code to three characters. To support a crypto currency with more than three characters, a unique Currency Code should be defined and the External Reference should be used to capture the recognized industry reference.
- References to the currency in product tables continues to use the three character unique currency code.
- Specific interfaces related to payments may need to be enhanced to support this feature. Contact your implementation team to confirm what customization are needed to handle larger currency references.

Steps To Enable

No steps are required to enable this feature.

Currency Portal

The **Currency** page has been converted from the "list" maintenance fixed page style to a portal-driven user interface page. An "all-in-one" metaphor is used, providing a list of the existing currency codes along with the standard ability to broadcast, edit, delete, duplicate, and add a new record.

The **Currency** page has been converted to a portal to provide you with a more flexible and extendable user experience.

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. This table lists the existing and new application services.

Object	New Application Service	Access Added to any User Groups with this Application Service / Read Access
Currency Portal	F1CRNCY	CILTCURP

Dashboard Location Values Adjustment

The dashboard location values were adjusted to reflect the behavior in a right-to-left language. The values are now 'Before' and 'After', which reflect the location of the dashboard relative to the location of the main page display.

- If the user's language is 'left to right', then the value of 'Before' means the dashboard is on the left and the value of 'After' means the dashboard is on the right.
- If the user's language is 'right to left', then the value of 'Before' means the dashboard is on the right and the value of 'After' means the dashboard is on the left.

Previously, the values were 'Left' and 'Right' with the product behavior based on a 'left to right' language. For a user with a 'right to left' language, the product was reversing the order of the page, including the location of the dashboard. The updated values now reflect the behavior for both types of languages.

Steps To Enable

No steps are required to enable this feature.

Display Icon Portal

Maintain display icon information using a standard portal.

The **Display Icon Reference** page has been converted to a portal to provide you with a more flexible and extendable user experience.

The display icon reference page has been converted from the 'list' maintenance fixed page style to a portal-driven user interface page. It includes a query zone where you can search by the code or the description. The image of the icon is displayed in the results.

Display Icon Query

Main

Display Icon Search

Expand Filters

Filters: Description arrow

	Display Icon	Description	Image
1	F1ALEFT	Arrow - Left	
2	F1ARGHT	Arrow - Right	
3	F1ARRCL	Arrow - Circled - Left	
4	F1ARRCR	Arrow - Circled - Right	
5	F1ARRCU	Arrow - Circled - Up	
6	F1ARWODL	Arrow - Open - Down - Left	
7	F1ARWODR	Arrow - Open - Down - Right	
8	F1ARWOUL	Arrow - Open - Up - Left	

12 Results.

Any page that includes a search for a display icon, such as Tree or Insight Type, uses the same query and also benefits from the enhancement to include the icon's image.

Display Icon: Arrow - Circled - Up

Add Search Bookmark Refresh

Main

Display Icon

Main

Display Icon

F1ARRCU

Description

Arrow - Circled - Up

Icon Type

Variable (SVG)

URL

ico-arrow-circle-up.svg

Image

Record Actions @

Edit Delete Duplicate

Record Information

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. This table lists the existing and new application services.

Object	New Application Service	Access Added to any User Groups with this Application Service / Read Access
Display Icon Query Portal	F1ICONQ	CILTDIRP
Display Icon Portal	F1ICON	CILTDIRP

Geographic Type Portal

The **Geographic Type** page has been converted to a portal to provide you with a more flexible and extendable user experience. An "all-in-one" metaphor is used, providing a list of the existing geographic types along with the standard ability to broadcast, edit, delete, duplicate, and add a new record. This portal improves productivity for adding and maintaining geographical types without impacting extensions.

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. This table lists the existing and new application services.

Object	New Application Service	Access Added to any User Groups with this Application Service / Read Access
Geographic Type Portal	F1GEOTYP	CILTGOTP

Note that any existing bookmarks for this page will take the you to the previous version of the page. Because this was a list-based page previously, the assumption is that you did not have any specific record bookmarked. If desired, you can delete the existing bookmark from the **Bookmark** dashboard zone and add a new bookmark of a specific geographic type.

Improved Field Portal

The **Field** page can now add or update the corresponding lookup field record. The only remaining reason to navigate to the **Lookup** page is for deletion or revision control purposes. Before this release, defining a lookup field involved setting the lookup field itself in the **Lookup** page and then adding it again in the **Field** page. This provides you with a seamless experience to maintain lookup fields. It improves efficiency for developers without impacting customizations.

Steps To Enable

No steps are required to enable this feature.

Inbound Web Service Query Portal - Additional Search Options

The **Inbound Web Service Query** portal is enhanced to support search by information related to REST operations and help text configuration. This provides additional query options for searching inbound web services. This is transparent to customizations as it improves efficiency for building and maintaining inbound web services for developers.

Steps To Enable

No steps are required to enable this feature.

Language Portal

The **Language** page has been converted from a "list" maintenance fixed page style to a portal-driven user interface page. An "all-in-one" metaphor is used, providing a list of the existing language codes along with the standard ability to broadcast, edit, delete, duplicate, and add a new record.

The **Language** page has been converted to a portal to provide you with a more flexible and extendable user experience.

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. This table lists the existing and new application services.

Object	New Application Service	Access Added to any User Groups with this Application Service / Read Access
Language Portal	F1LANG	CILTNGP

Lookup Portal

The **Lookup** page has been converted to a portal, leveraging a more flexible and extendable user interface metaphor. The portal supports navigating to the corresponding field associated with the lookup. This makes it easier to access the information. This portal improves efficiency for building and maintaining lookups for developers without impacting extensions.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

A new business object for Lookup 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
Lookup Portal	F1LKUP	CILTLKFP

Note that any existing bookmarks for this page will take the user 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 Lookup Field.
2. Navigate to the **Lookup** portal page via the menu.
3. Search for and select the Lookup Field 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.

Menu Portal

The **Menu** page has been converted from the fixed page style to a portal-driven user interface page.

The **Menu** portal includes an **Application Security** tab for reviewing and configuration application security information for any of the menu lines.

This functionality was previously released on a separate **Menu Application Security** portal that was accessible via a dashboard zone associated with the fixed style menu page. With the conversion of the menu page to a portal, all menu configuration options, including application security setup, are provided in one place.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

An upgrade script updates all user groups that currently have access to the existing Menu page application service CILEMNUP to have the same access to the new portal application service F1MENU. Note that any existing bookmarks for this page will take the user to the previous version of the page. You should delete those bookmark sand add them again as needed.

Online Help Opens in Oracle Help Center for Oracle Utilities Application Framework-based Applications

Opening online help from a Framework-based application now brings you to the relevant documentation page in Oracle Help Center. This removes the need to manage and

deploy the help engine used in past releases, and reduces the overall deployment times significantly.

You can use standard browser functions to bookmark pages and page headings, and use your browser's option to open the content in a new tab or open it in a new window. Note that because the help launches as a standard browser window, the default behavior is that it will open in a new tab in the same window. Once the help is launched, you can set in your browser to move the tab location or separate it to its own window as desired going forward. There were also some enhancements to the online help to make navigating the content easier.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

If you delete the part of the URL following the product name, you will be taken to the page that contains all the documentation for that product. For example, removing 22C/ccs-user-guides/ from <https://docs.oracle.com/en/industries/energy-water/customer-cloud-service/22c/ccs-user-guides/> takes you to the main documentation page for the Oracle Utilities Customer Cloud Service where you can access release readiness materials, cloud service guides, video training, and more.

Phone Type Portal

The **Phone Type** page has been converted to a portal to provide you with a more flexible and extendable user experience.. An "all-in-one" metaphor is used, providing a list of the existing phone types along with the standard ability to broadcast, edit, delete, duplicate, and add a new record. This portal improves productivity when adding or maintaining phone types without impacting extensions.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

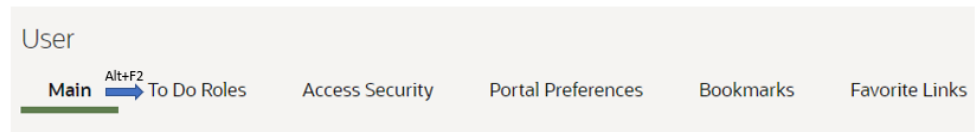
Upgrade scripts ensure that users with Read access to the existing application service will have access to the new application service associated with the new portal. The table below lists the existing and new application services.

Object	New Application Service	Access Added to any User Groups with this Application Service / Read Access
Phone Type Portal	F1PHNTYP	CILTPHTP

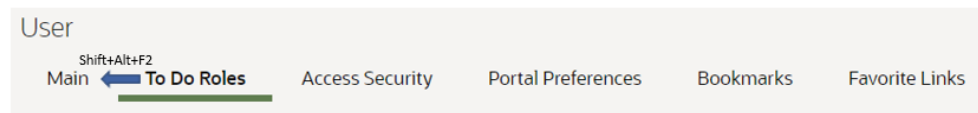
Note that any existing bookmarks for this page will take the user to the previous version of the page. Because this was a list-based page previously, the assumption is that you did not have any specific record bookmarked. If desired, you can delete the existing bookmark from the **Bookmark** dashboard zone and add a new bookmark of a specific phone type.

Shortcut Key for Navigating Multiple Tabs Adjusted

The shortcut key for navigating from one tab of a page to the next tab on the same page is now Alt+F2. In the following example, if you are on the **Main** tab of the **User** page and wish to go to the **To Do Roles** tab, you could use Alt+F2 to get there.



To go to the previous tab, use Shift+Alt+F2:



Previously, the shortcut keys for this functionality were F2 and Shift+F2, respectively. OJet uses F2 for some of its keyboard navigation and since the product uses OJet widgets for base functionality like Trees and Insights, the shortcut keys were adjusted to be able to take advantage of the built-in OJet features.

Steps To Enable

No steps are required to enable this feature.

Unified Search Improvements

Previously, the Unified Search supported a single search option for a user. Now a user may switch between search options to which they have access. In addition, information about the current search option, which filters and hints it supports, and a recent search history, are all new features easily available to assist the user.

The unified search is enhanced to provide help on each filter and hint, and allow you to toggle between multiple search options you can access.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

Refer to [Unified Search Enhancements](#) training.

User Group Portal

The **User Group** page was replaced with a standard query portal that supports additional search filters by application service and user.

The **User Group Maintenance** page was replaced with a standard portal with the ability to use mass actions to:

- Add and remove application services, both at the service and access mode levels.
- Add and remove users.
- Set the expiration data for application services and users.

- Configure security type authorization information.

You can also review application components that are secured by the user group. This is similar to the **Application Security Query** portal which was also introduced in this release.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

A new business object for User Group 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
User Group Portal	F1UGRP	CILTUSGP
User Group Query Portal	F1UGRPQ	CILTUSGP

Note that any existing bookmarks for this page will take the user 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 User Group.
2. Navigate to the **User Group** portal page via the menu.
3. Search for and select the User Group 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.

Key Resources

See the [Security Enhancements](#) training.

Work List Zone - Improved Item Navigation

The Work List zone is populated whenever you click the **Work List** icon in the header of a data explorer results list.

The following enhancements were made to the **Work List** zone:

- The entry that you are currently working on is marked with a star. Previously, a check was used for both the current entry and entries already visited. Now the check is only for the previously visited entries.

	2	Process Flow Delete Validation
---	---	--------------------------------

- Previous** and **Next** buttons allow you to move through the list without having to find the next entry to click.



- You may actively mark a row to ignore when using the **Previous** and **Next** buttons. You can do this by clicking the column adjacent to that entry. Clicking this icon removes the indication and allows the entry to be included in the next/previous processing again.

	6	Determine Algorithm BO
--	---	------------------------

- If you have a long list, the zone keeps the current entry position in view even after refreshing the dashboard. Previously, any refresh of the zone would reposition the list to the top requiring you to scroll to find your current entry.

Work List

Clear





Previous

Next

	18	Status Reason - Only One Reason for Use
	19	Validate a User's Access to a BO State
	20	Take BO Status/Reason Final Snapshot

Steps To Enable

No steps are required to enable this feature.

Key Resources

See the [Enhanced Work List Zone](#) training.

Data Export

This section describes the new and enhanced data export features in this release, including:

- [Data Redaction Rules](#)
- [General Data Export - Restrict Initial Export by Time](#)
- [Generalized Export Dashboard Portal Enhancements](#)
- [Generalized Data Export Support for Entity Log Records](#)
- [Generalized Data Export Support for Lost Ongoing Export Files](#)

Data Redaction Rules

Personal Identifiable Information (PII) that is not encrypted may require special handling when it is exported out of the application and written to files. Depending on how the export file is used, this type of information may need to be anonymize before being written to the file. Now, Generalized Data Export and Content Migration Assistant (CMA) batch processes support the anonymization of PII data based on customer-defined redaction rules.

A redaction rule defines the type of information that should be redacted, where it resides, and what function to apply to the value to anonymize it. For example, a phone number field may be redacted by applying a function that replaces all digits with 0. A library of common redaction functions is provided as an extendable lookup, and you may extend the list as needed. Sample redaction rules are provided as accelerator data, and you can update the rules as needed.

As a way of tracking and identifying fields that may contain sensitive information, a new searchable PII Class option now appears in the Field record definition.

The export tools were enhanced as follows:

- Content Migration Assistant
 - By default, data redaction rules are applied to anonymize sensitive information before it is written to the export file.
 - Depending on application security, you may indicate on a specific migration data set export request that data should be exported as it is (non-redacted). This option is only available to if you are provisioned with the "Do Not Apply Redaction Rules (NRDT)" access mode associated with the migration data set export's application service (F1MIGRDEXP).
- Generalized Data Export batch processes
 - By default, data redaction rules are applied to anonymize sensitive information before it is written to the export file.
 - A new batch parameter "Do Not Apply Redaction Rules" allows data to be exported as it is (non-redacted). The option requires that the user submitting the batch process is provisioned with the "Do Not Apply Redaction Rules (NRDT)" access mode associated with the data export application service (F1-DATAEXPORT).

- Note that Generalized Data Export data export is a single stream of files that may be sent to multiple targets. You should review these integrations to be sure they do not have conflicting redaction requirements.

Once redaction rules are defined in an environment, these processes will automatically anonymize data by default.

A new **Obfuscation Configuration** portal provides a consolidated view of all masking, encryption, and redaction rules.

Steps To Enable

Provide the required access before using the feature. Details are in the Access Requirements section.

Key Resources

Refer to the [Redaction Rules](#) training.

Access Requirements

System administrators should set/grant users/grant access as follows:

- Redaction Rule - Provide users with access to the following application services:
 - F1RDCTM - Redaction Rule portal
 - F1RDCTQ - Redaction Rule Query portal
 - F1-REDACTRULE - Redaction Rule maintenance object
- Obfuscation Portal - Provide users with access to F1OBFCFG application service.
- CMA - To allow users the option of exporting data as it is (not redacted), provide them with the "Do Not Apply Redaction Rules (NRDT)" access mode associated with the migration data set export's application service (F1MIGRDEXP).
- Generalized Data Export - To allow users the option of exporting data as it is (not redacted), provide them with the "Do Not Apply Redaction Rules (NRDT)" access mode associated with the data export application service (F1-DATAEXPORT).

General Data Export - Restrict Initial Export by Time

By default, the initial export batch process exports the entire data for an entity. In some situations, typically around high volume historical data, there is a need to restrict the export to more recent data (for example, the last few months of data).

The initial export batch process now supports an optional batch parameter named "Restrict By Date" that allows utilities to constrain the history they export. The parameter references the date field to use and the requested time frame in terms of number of days prior to business date. Refer to the Generalized Initial Export Template (F1-GEIXP) batch control for more information.

Note that excluding records from export should be carefully considered as this may result in data discrepancies when the excluded data is referenced on other entities. Refer to online documentation for additional considerations when using this option.

The option is only applicable to specific entities that have a qualifying reference date and the time frame for export may vary for each customer. Therefore, the new parameter is not added to any base product Initial Export batch control aside of the template batch

control for documentation purposes. Customers can clone the base product batch control for a specific entity and add the parameter to their custom version.

Steps To Enable

To enable this feature, complete these steps:

1. Clone the initial export batch control for the specific maintenance object.
2. Add the Restrict By Date parameter as defined on the Generalized Initial Export Template (F1-GEIXP) batch control.

Generalized Export Dashboard Portal Enhancements

When the list of entities to add or edit export settings for is too large, the transaction may time out. This situation often required the user to repeat the update in smaller batches. Now, by default, the application attempts to make the update in smaller batches. This minimizes timeout situations and makes them less problematic.

In addition, in some rare situations, the process to enable an entity for ongoing export may leave the entity not fully configured. Entities that are not fully configured are now explicitly highlighted as not configured, and they are listed at the top of the **Export Entities** zone. The user can then repeat the enablement action for these entities to resolve the problem.

Steps To Enable

No steps are required to enable this feature.

Generalized Data Export Support for Entity Log Records

By default, the Generalized Data Export batch process does not export maintenance object log tables due to performance and data volume considerations. Also, log records are omitted from export because they do not usually contain useful business information. However, there are entities for which log records have analytical value. As of this release, a new **Export Log Tables** maintenance object option allows an entity to be configured to explicitly include its log records when exported.

Steps To Enable

No steps are required to enable this feature.

Generalized Data Export Support for Lost Ongoing Export Files

The Generalized Ongoing Export (F1-GEEEXO) batch process now keeps a backup of all entity keys exported by a specific batch run number in a designated backup table. A new Restore Generalized Export Keys (F1-GERST) batch process assists in recovering from such lost file situation. The new process restores the keys of all entities that were exported during a specific batch run, from the backup table back to the ongoing changes queue, causing them to be exported again on the next ongoing export batch run.

Note that this method does not restore the exact content of the original file that was lost. That content cannot be reproduced. Instead, this process ensures that the entities that were included in the lost file would be extracted again.

Previously, the Generalized Ongoing Export (F1-GEEEXO) batch process did not keep a record of which entities were exported on a specific batch run. In cases where an export file is lost or damaged, there was no way to identify which entities should be exported again.

Steps To Enable

Provide the required access before using the feature. Details are in the Access Requirements section.

Access Requirements

System administrators should set/grant users/grant access to the F1-GERST application service for any user that should be able to run this batch job.

To Do Management and Processing Enhancements

This section describes the new and enhanced To Do features in this release, including:

- [To Do Management by Assigned User](#)
- [To Do Dashboard Details Tab](#)

To Do Management by Assigned User

Previously, the **To Do Management** portal restricted queries to a specific To Do Type. Now either a To Do Type or an Assigned User are required. As a result, there is now support for management of entries assigned to a user across multiple to do types.

Steps To Enable

No steps are required to enable this feature.

Key Resources

Refer to the [To Do Processing](#) training.

To Do Dashboard Details Tab

The **To Do Dashboard** portal is enhanced to provide a detailed list of the entries selected by the charts on a new **Details** tab.

The new tab supports further filtering and actions a user can take to manage the selected entries. This provides the same functionality supported by the **To Do Management** portal.

Note: With this enhancement to the **To Do Dashboard**, utilities are strongly encouraged to discontinue the use of the **To Do Summary** and **Supervisor To Do Summary** pages. The To Do Dashboard provides the functionality found in the two legacy 'summary' pages, and it also provides additional functionality not found in those pages.

Steps To Enable

No steps are required to enable this feature.

Key Resources

Refer to the [To Do Processing](#) training.

Batch Processing Enhancements

This section describes the new and enhanced batch processing features in this release, including:

- [Batch Logs for Issues Found Before Thread Execution](#)

- [Batch Submission Parameters Defaulted from Batch Control](#)
- [Manifest File Includes Previous Manifest File Information](#)
- [Plug-in Driven Batch Variables](#)
- [Plugin-driven Extract - Support for Writing to Multiple Files and Flexibility in File Names](#)
- [Submit Batch Job REST Linux Script](#)
- [Support for Encrypted Files and Digital Signatures](#)
- [Support Override of Base Algorithm on Batch Control](#)

Batch Logs for Issues Found Before Thread Execution

The product captures a standard output file for each thread. If there are errors found in any thread, an error file is also produced which is accessible from the **Batch Run Tree** page. You can now capture log files for steps performed prior to the thread execution, for example in the "get job work" step.

The batch framework writes some basic logging information for the standard output file. The format of the file name produced is *batch control + run number + re-run number + date-time.stdout*. You will see an 'stdout' file for the batch run as well as one for each thread. Individual batch jobs may now also write log statements to the new stdout file at the batch run level.

If a batch job encounters an error in the steps before the thread execution, for example in the "Select Records" step, an error file is also produced. The format is *batch control + run number + re-run number + date-time.stderr*.

These files are also accessible from the **Batch Run Tree** page.

Steps To Enable

No steps are required to enable this feature.

Batch Submission Parameters Defaulted from Batch Control

When submitting a batch job via any method, the system compares the provided parameters to those defined on the batch control.

- Any parameters that are missing from the request are populated from the batch control. Note that if the parameter is required and a default value is defined on the batch control, that value is used. If the parameter is optional, any default value found on the batch control is ignored. For optional parameters, the default value is only for online defaulting (where the user is able to choose to remove the default).
- In addition to the value, parameters define both a parameter name and sequence. If the parameters in the request only provide parameter name or sequence, the missing field is filled in based on the related batch control's definition. Note that if the request includes both the parameter name and the sequence, the system does not validate that the sequence is correct for the parameter name. The parameter name is the important field for the batch job functionality. The sequence is needed to ensure that the row is unique.

This feature improves the usability of the REST API used to submit a batch job (the 'submit' operation for the F1-SubmitJob inbound web service). Previously, the caller of

this API was required to determine the batch parameters from the batch control ahead of time. With this enhancement, callers can submit the request for the batch submission and only supply the parameter name/parameter value for optional parameters where a value is desired or for required parameters when the value differs from the default value on the batch control. Any optional parameters where no value is needed or required parameters where the default value from the batch control is acceptable do not need to be provided.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

Any implementation that is calling the REST API for submitting a batch job or submits a batch job in some other manner (besides online) can review their code to reduce steps for setting the batch parameters, if desired.

Manifest File Includes Previous Manifest File Information

When sending the latest data export file using the Generalized Data Extract functionality, the manifest file produced with an extracted file now includes the previous successful batch run number and the previous manifest file name. The receiving systems can use this information to compare with the most recent file received to determine if any expected file is missing.

This allows for quick detection of issues when information is regularly extracted to an external system.

Steps To Enable

No steps are required to enable this feature.

Plug-in Driven Batch Variables

The Plug-in Driven Upload process (template batch control is F1-PDUPL) now supports the following variables in the Processed File Extension parameter in addition to text:

- {RDT} or {runDateTime}
- {RD} or {runDate}
- {RT} or {runTime}
- {BC} or {batchCode}
- {BN} or {batchNumber}
- {RN} or {rerunNumber}
- {TN} or {threadNumber}
- {USR} or {userId}

The parameter must still end with text to streamline the existing system check, which ensures that the name of the file to upload does not include the text included in the Processed File Extension parameter. The User ID used for the parameter is the submission user instead of the "batch user."

Also, the Plug-in Driven Extract process (template batch control is F1-PDBEX) now supports the additional variables {USR} or {userId} as part of the file name. When these variables are specified, the submission user's ID is used.

Steps To Enable

No steps are required to enable this feature.

Plugin-driven Extract - Support for Writing to Multiple Files and Flexibility in File Names

The plug-in driven extract process has been enhanced to allow for the Process Records algorithm to return one or more file names to write the data to. This allows for use cases where the data should be segregated by a business value. It also supports indicating a different file name for each schema returned by the algorithm, allowing for one unit of work to contribute to more than one file. Several use cases informed this enhancement:

- The data being extracted is related to different service providers and a file should be produced for each service provider. In this case, service provider is the unit of work and each unit of work could produce a separate file.
- The implementation has several CIS divisions and when extracting data, for example an asset, the data should be segregated such that each division gets its own file.
- An extract of Person data should result in a file with all the individual person information, a file with all the business person information, and a consolidated file of contact information for all person types. In this case, one call to the Process Records algorithm will result in data written to two different files (individual or business person information and contact information).

If a batch job is multi-threaded, each thread continues to produce its own set of files. For the service provider use case above, a multi-threaded process should still result in a file per service provider. However, for the Division and Person examples, each thread may include files for the same division or person type. The option to concatenate files is still supported and will concatenate files where the file name is the same except for the thread number. The existing limitations for the use of file concatenation still apply. This is documented in the batch control parameter description in the metadata.

Steps To Enable

To enable this feature, refer to [Extract Record Processing](#) in the **Flexible File Name** section of the *Oracle Utilities Framework Administrative User Guide* for more information.

Submit Batch Job REST Linux Script

The submitbatchREST.sh Linux script enables implementations to submit batch jobs when using external batch schedulers. This script uses the Submit Operation of the F1-SubmitJob REST service to create an entry in the Batch Job Submission table, which the batch daemon polls to pick up and run the batch job. The script also uses the Get Operation of the F1-SubmitJob REST service to periodically poll the system to retrieve the "Get Batch Job" or "Batch Run" details to provide status updates until the completion of the batch job.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

The script accepts various parameters, including parameters for all the fields available to populate when submitting a batch job online using the **Batch Job Submission** page.

Information about the REST URI associated with the Batch Submission web service and the user name and password may be provided as parameters or may be determined using environment variables.

There is a parameter to indicate how often to poll for the batch job status.

Key Resources

Refer to the **Command Line Utilities** section of the *Oracle Utilities Server Administration Guide* for more information.

Support for Encrypted Files and Digital Signatures

Exchanging and signing encrypted files requires the sender and recipient to share keys. The system needs to record the public keys provided by external parties and generate public/private key pairs so the public keys may be exchanged when encrypting or signing files.

A new public encryption key ring business object (F1-ExtKeyRing) allows the public keys provided by the recipients of encrypted files to be stored. The key ring also captures the external system ID and external reference of the system receiving the encrypted files. A new encryption key pair business object (F1-InternalEncryptionKey) allows private/public key pairs to be generated and stored using standard PGP format. The new internal key pair is classified as 'File Encryption / Signing'. Key rings previously classified as 'Signature' are now referred to as 'RSA Signature'. A new flag has been added to key ring to categorize key rings as external, internal, or OAuth.

The lifecycle of a key ring key has been changed to provide more flexibility when rotating keys. Internal generated keys are created in a status of pending. They may be manually activated when the public key has been shared with the applicable third parties. When an external public key is added, the new key is automatically activated and the previously active key is expired. Expired keys may be manually inactivated. Note that inactive keys can no longer be activated again.

Batch processing has been enhanced to implement file encryption and decryption using PGP standards. Digital signatures are also supported, using the standard 'Sign' option. New batch parameters have been introduced to specify the external and internal keys to be used for encryption and/or signing and the file adapter automatically encrypts, decrypts and signs the file data based on the existence of these parameters.

Steps To Enable

To enable this feature, refer to **Understanding Background Processes** in the **Parameters Supplied To Background Processes** section of the *Oracle Utilities Application Framework Administrative User Guide* for more information.

Key Resources

See the [Security Enhancements](#) training.

Access Requirements

System administrators should set/grant users/grant access to the F1-EXTENCRYPTKEYBOAS, F1-EXTENCRYPTADDKEY and F1-INTKEYENCRBOAS application services.

Support Override of Base Algorithm on Batch Control

The following batch control plug-in spots are single algorithm plug-in spots:

- [Select Records](#)
- [Process Record](#)
- [File Upload](#)

If the product provides batch controls with algorithms for any of the above plug-in spots plugged in, you can now override the base algorithm by plugging in your own custom algorithm using a higher sequence. The system uses the algorithm with the highest sequence.

Previously, if a base product batch control was provided with algorithms for any of the above plug-in spots, you were not able to override the batch control algorithm. You could only clone the entire batch control if you wanted to override any of the provided algorithms.

Steps To Enable

No steps are required to enable this feature.

Implementation Tool Enhancements

This section describes the new and enhanced implementation tools in this release, including:

- [Action Provided to MO Audit Plug-In Spot](#)
- [Attachment Malware Scan Plug-in](#)
- [Base Product Index Data Visible in Table Portal](#)
- [Business Object Status Reasons REST API](#)
- [Characteristic Mapping Language Genericized](#)
- [Debugging Tools - Consolidated into a Single Button](#)
- [Dropdown Lists REST API](#)
- [Expand Tree REST API](#)
- [Extensions Dashboard Portal](#)
- [HTML Editor Syntax Highlighted](#)
- [HTML Row Header Reference Update](#)
- [Insights REST API](#)
- [Javadocs Viewer](#)
- [Menu Item Configuration for Add Action](#)
- [New Base Display Icon Images](#)
- [Parameter Update for New Language Batch Program](#)

Action Provided to MO Audit Plug-In Spot

The action of a record is now provided to the MO Audit plug-in spot. For business use cases where the algorithm should perform different logic based on whether the record is added, changed, or deleted, this information simplifies algorithm code. Previously, algorithms with this requirement had to determine whether the record was new, changed, or deleted themselves.

MO Audit algorithms now receive the action for the impacted object simplifying logic that may differ based on the action.

Steps To Enable

No steps are required to enable this feature.

Attachment Malware Scan Plug-in

The system supports a malware scan algorithm that is called when adding an attachment. This uses the "Attachment Malware Scan" System Event for on the **Algorithms** tab of the **Installation Options - Framework** portal. If an algorithm is plugged into this spot, it is called every time an attachment is uploaded, regardless of the method. In addition, the product has supplied a base algorithm that calls ClamAV. The ClamAV is not provided. Implementations need to separately install that software. If your implementation prefers to use a different malware scanning software, you can implement your own algorithm and plug it into the Installation Options.

Scanning attachments for malware before they are uploaded allows you to prevent harmful information from getting loaded to the system.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

Note that if you use ClamAV, there are properties to configure to indicate the host and port for the software.

Base Product Index Data Visible in Table Portal

The **Index** tab on the **Table** portal now shows the base product-owned indexes. This allows for developers and implementers to view the information about the product delivered indexes.

Previously, the index information was only visible in the database. Also, in a previous release, metadata tables were added for defining indexes associated with a Table, however the new index metadata tables were not populated with the based product delivered indexes.

Steps To Enable

No steps are required to enable this feature.

Business Object Status Reasons REST API

A new Status Reasons REST API (F1-StatusReasons) allows an external user interface application to retrieve valid reasons to be presented to a user when they perform an action that transitions an entity to a new status.

User interface applications like Visual Builder can use a new API for presenting valid reasons for transitioning an entity to a new status.

Steps To Enable

No steps are required to enable this feature.

Characteristic Mapping Language Genericized

The characteristic mapping maintenance object (MO) is enhanced to allow for future support of mapping identifier values as well. As part of this effort, the maintenance object and the UI portal and many of the related artifacts are renamed to be more generic: Analytics Attribute Mapping.

Characteristic Mapping continues to be a business object for this MO and no changes exist for that functionality.

The newly rebranded Analytics Attribute Mapping table now includes new columns to support mapping of identifier values. There is a new business object visible in this release: F1-IDMapping. This business object captures the data needed to configure mapping of a given identifier type and value defined in a child table of an MO to a user defined field for a target dimension for the parent table of that MO. Note however that the changes to Oracle Utilities Analytics Visualization (OUAV) to support the identifier mapping are not supplied in this release. You may choose to define the metadata for the identifier mapping but they will not be used by OUAV at this time.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

The new business object uses the same application service as the Characteristic Mapping business object. (F1-CHARMAPBOAS). This application service description is changed to "Operational Analytics Mapping BOs" reflect its broader purpose.

Debugging Tools - Consolidated into a Single Button

The various debugging tools that are enabled when the URL includes the `debug=true` parameter have been moved to a slide out panel enabled by a new 'bug' icon. The options visible to you when the debug parameter is turned on depend on whether your implementation is cloud or on-premise and your individual security rights.

In addition, the product has provided a new menu entry in the Help menu: Enable | Disable Debug. If you have access to the security application service for this menu entry, you can turn on or off debug without changing the URL parameter.

Steps To Enable

Provide the required access before using the feature. Details are in the Access Requirements section.

Tips and Considerations

Security is only needed for the menu entry. Using the `debug=true` parameter in the URL functions the same as before with respect to security.

Key Resources

Refer to the **Debug Mode** section of the *Oracle Utilities Application Framework Administrative Guide* for more information.

Access Requirements

System administrators should grant users access to the application service F1OUDBUG.

Dropdown Lists REST API

A "Dropdown Lists" (F1-DropdownLists) REST API retrieves data needed for building one or more drop-downs. Information for a drop-down includes a list of valid codes and their corresponding descriptions.

The web service supports the following types of drop-down data sources:

- Lookup field
- Extendable lookup
- All records in an admin maintenance object (only single prime key field entities are supported)
- Business service/service script computed list of values

User interface applications like Visual Builder (VB) may use a new API for retrieving data displayed as drop-downs.

Steps To Enable

No steps are required to enable this feature.

Expand Tree REST API

The product provides a comprehensive infrastructure that supports user interface rendering of hierarchical information for a specific context based on configurable tree definitions. For example, it can present a tree view of entities related to an account. Now a new "Expand Tree" REST API (F1-ExpandTree) allows an external user interface application to retrieve hierarchical information for a specific context based on the same tree configuration. The information provided by the web service focuses on presentation content and includes minimal visualization recommendations, allowing the external application to render each tree node as per its own configuration and rules. Since they are application specific, the information also does not include action-related settings.

Steps To Enable

No steps are required to enable this feature.

Extensions Dashboard Portal

The new **Extensions Dashboard** portal provides a high-level summary of all utility-owned entities and extensions made to base product entities. Information is summarized by maintenance object and allows the user to view the specific entities for a specific maintenance object and navigate to the respective page or portal for more information. With this information, utilities can better assess the necessary testing when planning for product upgrades and investigate the removal of extensions when upgrading to reduce costs.

Steps To Enable

Make the feature accessible by assigning or updating privileges and/or job roles.

Key Resources

Refer to the [Extensions Dashboard Portal](#) training.

Roles and Privileges

System administrators should set or grant users access to the F1CMEXT application service.

HTML Editor Syntax Highlighted

The HTML editor on the UI Map/Schema tab has been updated to use a syntax highlighter to make it easier to review and update HTML.

HTML Editor

```

1 <!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Strict//EN" "http://www.w3.org/TR/xhtml1/DTD/xhtml1-strict.dtd">
2 <html xmlns="http://www.w3.org/TR/xhtml1/strict">
3
4 <head>
5 <title></title>
6 </head>
7
8 <body class="oraZoneMap" onload="createChart()">
9
10 <oraInclude map="F1-OJETLIBS" />
11 <link href="cisDisabled.css" type="text/css" rel="stylesheet" />
12
13 <script type="text/javascript">
14 // <![CDATA[
15 function createChart() {
16     var refreshFunc = null;

```

This makes it easier to review and update the HTML.

Steps To Enable

No steps are required to enable this feature.

HTML Row Header Reference Update

The HTML5 standard requires the use of the <TH> element within a table row when it is being used as the row header (<th scope="row"></th>). Previously, these elements were allowed to use a <TD> element for the row header.

For tables that are generated by Oracle Utilities Application Framework (Data Explorers, standard UI Map grids, and more), the HTML is automatically updated to match Oracle standards. If you are creating a table manually, a change is not required but it is recommend you update your HTML for better accessibility.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

While this update will generally not require any changes, there is the possibility that a problem may occur if you have a specific type of code within your product. If you are gathering an array of <TD> elements, then the index may have changed (or not exist any more). For example:

- `var myTDs = myRow.getElementsByTagName('td');`

This will no longer return the same number of elements, as one of the <TD> elements may now be a <TH>. You will need to adjust any code to account for the new index number. We would recommend not using this technique as referring directly to the column number (`myRow.col[3]`) or applying a class name query (`myRow.querySelector('.specialColumn')`) is safer and more "future-proof". Additionally, if you have applied any custom styling to <TD> elements, this may need to be updated to include <TH> elements in a non <THEAD> row.

Insights REST API

The product already provides a comprehensive infrastructure that supports user interface rendering of various types of insights for specific contexts. For examples, billing insights about an account, person, and more.

A new "Insights" REST API (F1-Insights) allows an external user interface application to retrieve insight information for a specific context based on the same insight configuration. The information provided by the web service focuses on insight content and includes minimal visualization recommendation, allowing the external application to render the insights as per its own configuration and rules. For the same reason, the information does not include action-related settings because they are application specific.

Steps To Enable

No steps are required to enable this feature.

Javadocs Viewer

Javadocs viewer is now available via the Admin > Implementation Tools menu. This launches the Javadocs landing page, which allows you to view information about base delivered Java classes and packages. In addition, when viewing an algorithm type, batch control, or foreign key reference, a 'source viewer' icon is visible when a Java program is displayed. If you click the icon, it launches Javadocs for that particular program.

In the **Script** page, the **Script Tips** zone in the dashboard includes a link to View Groovy Javadocs. This allows script writers to view information about methods and classes available for developing Groovy scripts.

Steps To Enable

Provide the required access before using the feature. Details are in the Access Requirements section.

Tips and Considerations

The Javadocs menu entry has an application service described above. For the View Groovy Javadocs link in the script tips zone, no additional security is needed. As long as you have inquire access to the Script page, you have access to view the Groovy Javadocs. Similarly, for launching Javadocs using the 'view source' icon on Algorithm Type, Batch Control or FK Reference, no additional security is required. As long as you have inquire access for the Algorithm Type, Batch Control or FK Reference pages respectively, you are able to view the Javadocs.

Access Requirements

System administrators should set/grant users/grant access to the F1JAVADOCS application service to grant access to the new Javadocs Viewer menu entry.

Menu Item Configuration for Add Action

Menu items include optional configuration for application service and access mode. For menu items associated with searching, security is controlled by the associated portal or transaction's application service. Therefore, defining an application service on these menu item is only useful to override the base application service, which is not common. However, for many menu items related to the add action, if a users did not have access to that action, they may still see the option on the menu and would only get a security error later after attempting to add. Utilities could override this by configuring an application service for the "add" Menu Item.

All product menu items handling an 'add' or any other action are configured with an application service or access mode by default.

Steps To Enable

No steps are required to enable this feature.

Tips and Considerations

If your implementation has associated any base menu item with an application service, this configuration will not be overridden.

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
	F1STAR	Star
	F1STARTS	Star - Solid
	F1VWHD	Hidden from View

Additional icons allow for an enhanced user experience for displayed information.

Steps To Enable

No steps are required to enable this feature.

Parameter Update for New Language Batch Program

The language input parameters in the F1-LANG (New Language) batch program were adjusted to avoid confusion when submitting the batch for deletion of a language.

The two parameters were previously called Source Language and Target Language. Their descriptions have changed to Copy From Language and Action Language. The parameter names were not changed.

* 20	sourceLanguage	Copy From Language	Enter the language code for the source data. Only required for the add action. 
* 30	targetLanguage	Action Language	Enter the language code for which the data is being added or deleted. 

The behavior for adding a new language has also not changed. You should continue to put the Language to copy from first, and then the language you are adding as the second parameter. For example, if you are creating German language rows, using English as the Copy From Language, you would populate:

- **Action: ADD**
- **Copy From Language (formerly Source Language): ENG**
- **Action Language (formerly Target Language): GER**

However, the behavior for deleting changes has been updated. Previously, you populated the Source Language for the delete. Now you populate the Action Language. For example:

- **Action:** DEL
- **Copy From Language (formerly Source Language):**
- **Action Language (formerly Target Language):** GER

In addition, the batch program has been updated to prevent you from deleting rows for the ENG language that would result in the product system metadata being deleted.

Steps To Enable

No steps are required to enable this feature.

Content Migration Assistant (CMA)

This section describes the new and enhanced CMA features in this release, including:

- [CMA Import Performance Improvements](#)
- [CMA Support for Separate Configuration and Business Data Migrations](#)
- [Export Content Migration Assistant Data to an Older Version](#)
- [Migration Plan Pre-Compare Algorithm Execution Update](#)

CMA Import Performance Improvements

By default, the Content Migration Assistant (CMA) import process creates a migration object for each imported entity. This allows for a granular reporting and error handling at the entity level. When importing a high volume data set of business entities, this granular management has a performance toll.

The CMA import process now supports a Bulk Import option by which a group of entities, of the same maintenance object, is managed as a single migration object. Using this option reduces the migration object management effort throughout the process and results in better performance. Each entity is still individually validated in this mode, as in regular import processing, but if one entity is invalid the entire migration object is not applied (impacting all entities within it). Bulk import mode is useful when importing a large set of data from a validated data source when almost no errors are anticipated.

The indication of whether to use bulk import or not is specified on the migration data set import request.

Another new option, also specified on the migration data set import request, allows you to indicate that all imported entities are assumed to be new additions to the current environment. By indicating that this import is Insert Only, the import process avoids unnecessary steps to determine whether the entity should be added or updated.

These options are only supported for master and transaction maintenance objects. They are not applicable to configuration migrations.

The import step of the CMA process has been enhanced to execute insert statements more efficiently by leveraging the database's bind variables functionality. This is transparent to existing in-progress migrations.

Steps To Enable

No steps are required to enable this feature.

CMA Support for Separate Configuration and Business Data Migrations

By default, the same import CMA batch processes manage configuration and business data migrations. Typically, business data migrations involve high volume of records compared to much lighter configuration data sets. Processing them together by the same batch process slows down the performance of configuration migrations, preventing them from completing faster and more frequently. The issue mainly affects test-like environments where mixed data class migrations is more common: configuration data is imported from a lower environment and large test data is imported from a higher environment. Now you can adjust your CMA configuration in such environments to benefit from separating the import processes for configuration and business data.

The need to separate import processes mainly applies to migration objects because of their volume. Migration data set and transaction records are of low volume and as such are still managed by the same batch processes.

New batch processes are provided for importing migration objects containing business data:

- F1-MGOPB - Migration Object Monitor (Business)
- F1-MGOAB - Migration Object Monitor (Business) - Apply

By default, the existing migration object batch processes continue to handle both classes of data. To use the new batch processes for business data, you need to associate the new business data migration object BO provided as part of this enhancement with the new batch processes. See the steps below for details.

Steps To Enable

To enable this feature, update the Migration Object Business Data (F1-MigrObjectBus) business object to reference the new batch controls on the following statuses:

- Pending - Migration Object Monitor (Business) (F1-MGOPB)
- Error Applying - Migration Object Monitor (Business) (F1-MGOPB)
- Needs Review - Migration Object Monitor (Business) (F1-MGOPB)
- Approved - Migration Object Monitor (Business) - Apply (F1-MGOAB)

If the customer is using event driven job submissions:

- Add the new submission algorithm F1-MGOPRB-SJ to the Migration Data Set Import business object on specific statuses:
 - Ready to Compare
 - Retry Objects
- Add the new submission algorithm F1-MGOAPB-SJ to the Migration Data Set Import business object on specific status: Apply Objects
- Add the post processing algorithm F1-MGDIM-NJ to the Migration Object Monitor (Business) - Apply (F1-MGOAB) batch control to submit the data set monitor when the step of applying business migration objects is complete
- Add the post processing algorithm F1-MGTPR-NJ to the Migration Object Monitor (Business) (F1-MGOPB) batch control to submit the transaction monitor when the step of business migration objects monitoring is complete

Export Content Migration Assistant Data to an Older Version

When performing a Content Migration Assistant (CMA) export, the format of the file is specific and the CMA import step knows how to read the file. There are times when the product makes an enhancement to CMA that requires a change in the structure of the export file at which point the 'version' of the CMA file is incremented. When this happens, the import step is able to detect if you are importing an older version of the CMA file and proceeds accordingly.

The product now provides support for exporting a CMA file using an older version format. For example, the current CMA version is 5. When creating a Data Set Export, you can indicate that you want to export using version 4. This is useful if you have upgraded one of your environments to a version of the product that uses CMA version 5, and you need to export data to an environment that has not yet been upgraded and is therefore still on version 4.

Migration Data Set Export

Main

Migration Request	F1-GeneralSystemOptions	Q General System Options, Criteria-based
* Export Directory ⓘ	/tmp	
File Name	servicePack1.txt	
File Suffix ⓘ	txt	
Export Description	Service Pack 1	
Source Environment Reference	https://ugbu-phx-90.snphxprshared1.gbucdsint02phx.or	
Migration File Version	4	

This is analogous to choosing to save a Microsoft Word document using an older version of Word (for example, with the .doc file type) during the period where not all software could consume the newer (.docx) version.

Steps To Enable

No steps are required to enable this feature.

Migration Plan Pre-Compare Algorithm Execution Update

When the migration data import process runs the pre-compare algorithms for a given migration plan, the logic now includes the algorithms configured on the migration plan in the target environment as part of the execution. Previously, this step only included the pre-compare algorithms carried over from the source environment. This ensures that any additional data updates applicable at the target are included.

Steps To Enable

No steps are required to enable this feature.

Miscellaneous Enhancements

This section describes the new and enhanced miscellaneous features in this release, including:

- [Application Service's Application Security Zones](#)
- [Cloud Object Storage Support for Platform as a Service \(PaaS\)](#)
- [Implementations using Platform as a Service \(PaaS\) can configure the file adapter of the Oracle Cloud Infrastructure Object Storage service to store interface files and reports.](#)
- [HTML Sanitization Improvements](#)
- [Improved Characteristic Type Referential Integrity](#)
- [Key Ring Support for OAuth Client and Secret](#)
- [New Class Element on Business Flag Standard Name Business Object](#)
- [Support for Capturing and Exporting Batch Run Analytics Data](#)

Application Service's Application Security Zones

The zones on the **Application Service - Application Security** tab have the following improvements:

- The **Deny Access** button in the **User Groups Linked** zone has been converted to a mass action button, allowing updates to multiple groups with one action. In addition, the search filters have been enhanced to provide a search within search to find a specific user or user group, filter by user group description, and exclude expired links. The Expiration Date column has been enhanced to highlight expired links in bold with red text and an asterisk. The Access Modes column now shows only the application service access codes that are not configured for the user group.

User Groups Linked ⓘ

Filters: Application Service CILQTDPE

Deny Access

☐	User Group	Description ⓘ	Expiration Date	Missing Access Modes	Security Types with Authorization
☐	ALL_SERVICES	System User Group	01-01-2100		
☐	CMA-WAM-BASE	Base User Group ALL non-WAM_BASIC Users would need	01-01-2100	Add,Change,Complete,Execute,Forward,Send Back	
☐	CMA-WAM-READ-ONLY	Read Only Access to all non-Admin WAM Portals	01-01-2100	Add,Change,Complete,Execute,Forward,Send Back	
☐	WD-DACS-SERVICES	New Digital Asset Cloud Service Security	01-01-2100	Add,Change,Complete,Execute,Forward,Send Back	

User

Q

User Group

Q

User Group Description

Exclude Expired User Groups

☐

Search

- The **Grant Access** button on the **User Groups Not Linked** zone has been converted to a mass action, allowing updates to multiple groups with one action. A pop-up window provides the ability to set the expiration date and remove unwanted access modes. In addition, the search filters have been enhanced to

provide a search within search to find a specific user or user group and to filter by user group description.

User Groups not Linked ⓘ

Filters: Application Service CLOQDEP

Grant Access

☐ User Group	Description ⓘ
☐ CMA-ASSET-MGR	Asset Manager - full access to all Asset portals
☐ CMA-CUST-SERVE	Customer Services Clerk
☐ CMA-CWM-PLANNER	Construction Work Management Planner
☐ CMA-INVENTORY	Inventory - full access to all Inventory related portals
☐ CMA-PREV-MAINT	Preventive Maintenance Planner
☐ CMA-PURCHASING	Purchasing - full access to all Purchasing related portals
☐ CMA-SCHEDULER	Scheduler - full access to all Scheduling portals

User

User Group

User Group Description

Search

Steps To Enable

No steps are required to enable this feature.

Cloud Object Storage Support for Platform as a Service (PaaS)

Implementations using Platform as a Service (PaaS) can configure the file adapter of the Oracle Cloud Infrastructure Object Storage service to store interface files and reports.

Steps To Enable

No steps are required to enable this feature.

Digital Self Service Masquerading Using Key Ring

The product supports the ability for a utility to authorize an external person to view the customer's account information in a customer-facing portal (such as Digital Self Service). The system uses a private/public key to enforce standard security measures. Previously, the, Redirection Targets master configuration captured a reference to the alias for the key pair stored in the application keystore. Users may now capture a reference to a Signature key ring instead of the alias. This allows implementations to generate the key pair and to rotate the key pairs over time for greater security. Keystore aliases may no longer be used.

The master configuration for Redirection Targets now allows a key ring to be defined instead of the application keystore alias. This provides you with the ability to more easily manage Digital Self Service security.

Steps To Enable

No steps are required to enable this feature.

HTML Sanitization Improvements

The product uses HTML sanitization logic to protect against HTML injection. In this release, the product has improved how it handles custom attributes. Previously, the sanitization logic would automatically sanitize unrecognized custom attributes. Now the sanitization logic has been adjusted to assess the data referenced by the attribute. If the data appears to pose an HTML injection risk, the attribute is sanitized by adding 'data-' to the attribute, rendering it harmless. If the data is considered safe, the custom attribute is accepted as implemented.

Improvements to the HTML sanitization functionality to better handle custom attributes.

Steps To Enable

No steps are required to enable this feature.

Improved Characteristic Type Referential Integrity

The logic to check referential integrity for characteristic types and characteristic values is adjusted to be more targeted, and uses the characteristic entity configuration.

Tables that hold characteristic types and values fall into one of the following categories:

3. Characteristic tables that are a child record of a maintenance object and are used to capture additional information about that object.
4. Log tables that use characteristics to reference additional information related to the log.
5. Configuration tables to define valid characteristics for a related master or transaction table. For example, on the To Do Type, you can configure valid characteristic type for To Do Entries of that type.
6. Configuration tables that use characteristic types for eligibility criteria.
7. Staging tables that capture characteristics as part of an integration step.

Most characteristic tables fall into the first two categories. For these two categories, there is a characteristic entity flag value for each table and the table metadata defines its characteristic entity. For example, the To Do Entry Characteristic table defines the To Do Entry characteristic entity flag value. In this release, those tables have been updated to turn off the Enable Referential Integrity switch for the Characteristic Type and Characteristic Value constraints. Instead, explicit deletion validation logic has been added for Characteristic Type and Value. The logic looks at the Characteristic Entity values associated with the Characteristic Type and will only check the tables related to those values for references to the Characteristic Type/Value.

Tables in category 3 do not reference a characteristic entity value. Since these are configuration tables and low volume, the constraints for Characteristic Type and Characteristic Value continue to turn on the generic referential integrity.

Tables in categories 4 and 5 may or may not have an explicit characteristic entity value depending on the use case. For these types of tables, if there is no Characteristic Entity, it is at the discretion of the product that owns that table as to whether or not referential integrity is enabled for that table.

This enhancement ensures that the deletion logic will not spend time checking every characteristic table for a reference the characteristic type/value. It will first explicitly check the tables related to the characteristic entities configured on the Characteristic Type, and then the standard generic referential integrity based on the constraint configuration will be applied.

Note that as part of this change the referential integrity is also checked when removing a Characteristic Entity value from the Characteristic Type. For example, if you have a Characteristic Type that references the To Do Entry characteristic entity and you want to remove that characteristic entity value, the system will check first that there is no To Do Entry that references that Characteristic Type.

Steps To Enable

No steps are required to enable this feature.

Key Ring Support for OAuth Client and Secret

The product supports securing outbound messages using OAuth authentication. The client ID and secret used to obtain access are stored as message sender context values.

A new OAuth key ring business Object (F1-OAuthKeyRing) allows the client ID and secret to be stored in the same secure repository as other key ring classes, such as Signature keys. The key ring may be configured on the message sender context, replacing the client ID and secret context types. This enables the client secret to be updated periodically without having to update the associated message senders.

In addition, the key ring maintenance object is now an 'owned' entity. Message senders can now be delivered with the appropriate key ring already configured. Users will only have to add their specific keys to the delivered key ring.

Steps To Enable

No steps are required to enable this feature.

New Class Element on Business Flag Standard Name Business Object

The F1-BusinessFlagStandardName business object is enhanced to include a new, required element for Class. The class element is mapped to a characteristic of type F1-BSFCL, which has values of Business Flag and Real Time. The description on the F1-BusinessFlagStandardName BO has been changed to External Insight Standard Name to reflect its expansion to a wider set of external insights.

Additional class element added to the External Insight Standard Name (formerly described as Business Flag Standard Name) extendable lookup business object allows developers to restrict the choice of standard name types on a business flag type to specific classes.

Steps To Enable

No steps are required to enable this feature.

Support for Capturing and Exporting Batch Run Analytics Data

There is a high volume of batch run data in the operational system that changes frequently and is recorded in a complex set of relationships. This is not well suited for analytics that run directly off the operational data or for being exported for use in other environments. The previous release introduced new tables to support snapshots containing only the batch run and batch thread data applicable to analytics. This release introduces new batch processes designed to populate and export from these tables in increments.

The Batch Run Analytics Snapshot Update and the Batch Thread Analytics Snapshot Update processes are used to add data to the snapshot tables on an ongoing basis. Each snapshot update selects only the batch runs and threads not already in the snapshot. In order to support the initial population of the tables, parameters are provided to limit the records selected to a range of months. Refer to batch controls F1BRANSN and F1BTANSN for more information.

The Batch Run Analytics Snapshot Data Export and the Batch Thread Analytics Data Export processes are used to extract data from the snapshot tables on an ongoing basis. These processes assume that a Data Export Control exists for each of the snapshot maintenance objects to capture the date of the previous extract as a reference point for

selecting the next set of records. Refer to batch controls F1BRANEX and F1BTANEX for more information.

The analytics views have not been amended to reference the batch snapshot tables in this release. The batch processes are provided to allow the tables to be populated ahead of the introduction of new batch views in future.

Steps To Enable

Provide the required access before using the feature. Details are in the Access Requirements section.

Access Requirements

System administrators should grant access to the F1-BTCHSN application service for any user that should be able to run this batch job.

Oracle Utilities Application Framework Deprecation Notices

This section provides information on functionality that has been removed, is no longer supported by Oracle Utilities Application Framework v4.5.0.1.1, or is planned for removal.

- [Deprecated Items](#)
- [Items Planned for Future Deprecation](#)

Deprecated Items

This is a list of functionality / system data that Oracle already removed from the Oracle Utilities Application Framework.

Support for Migration Requests F1-FrameworkAdmin and F1-SchemaAdmin

These two migration requests have been marked as not recommended for a long time. As of this release, they are no longer delivered in base.

For backward compatibility, the two migration requests are updated to have a "CM" owner for upgrading utilities. To avoid confusion, you may remove the records from your installation if they have never been used.

Work Calendar Legacy Page Metadata

The following navigation keys have been removed:

- workCalendarMaint
- workCalendarMainPage
- workCalendarHolidayGrid
- workCalendarMainPage_H

Records in the UI metadata program component tables related to the above navigation keys.

Time Zone Legacy Page Metadata

These navigation keys have been deprecated:

- timeZoneMainPage

- timeZoneMainPage_H
- timeZoneTabMenu

Records in the UI metadata program component tables related to the above navigation keys.

Invite User to Mobile Application Zone

This zone was implemented as part of the mobile application, which is no longer supported.

Mobile Remote Message Artifacts

The user interface metadata has been removed for this object. This table was originally configured to support ILM, but it is no longer included in ILM partitioning steps.

Batch controls related to processing this table were removed if no instance data in the Batch Run table is found. If instance data is found, the batch control metadata is retained with a CM owner flag.

Mobile Data Terminal Artifacts

The user interface metadata has been deprecated for this object.

Mobile Component Artifacts

The user interface metadata and migration plan pan have been removed for this object.

Mobile Data Terminal Type Artifacts

The user interface metadata and migration plan have been deprecated for this object.

Deployment Part Artifacts

The user interface metadata and migration plan pan have been removed for this object.

Deployment Type Artifacts

The user interface metadata and migration plan have been deprecated for this object.

Deployment Artifacts

The user interface metadata has been removed for this object.

Master Configuration Business Objects Related to Mobile Application Framework

The master configuration business objects F1-MobileConfigurations and F1-MobileIdentityConfiguration are no longer delivered in base. Artifacts related to these BOs are removed if no master configuration records are found for the respective BOs. If there is a master configuration found for either, then the related data remains with a 'CM' owner.

The REST service and corresponding script to update the master configuration is deprecated.

- IWS: F1-MobileIdentityConfiguration
- Script: F1-MobIdMCfg

Migration Plan - Import Algorithms

The Import algorithm plug-in spot for migration plan was flagged for deprecation many years ago and the base product does not deliver algorithms for this plug-in spot. The Pre-

Compare plug-in spot is the recommended mechanism for adjusting migration data during import.

User Group Service Management Portal

This functionality was moved entirely from the **User Group Service Management** portal to the **Service Manager** tab on the new **User Group** portal.

Items Planned for Future Deprecation

This is a list of functionality / system data that Oracle plans to deprecate in a future release.

Support for Previous User Experience

In the current release, the product provides an option to Switch UI View. This changes the current user experience for the user for that session. Assuming the user is in the latest user experience (referred to as Redwood), this action switches the user experience to the previous look-and-feel.

In the future, the product plans to remove support for the ability to switch that design that preceded Redwood.

F1-DFLTAPS and FWLZDEXP Application Services

In an effort to consolidate application services, the product is removing all references in base delivered metadata to F1-DFLTAPS and FWLZDEXP. Records will instead reference F1-DFLT.

You should select **Admin > Security > Application Service** and view F1-DFLTAPS. Review the Secured Objects zone. Note especially if your implementation uses this application service within HTML or Schemas. Any references should be adjusted to F1-DFLT or a different application service that is appropriate for the business rule.

Implementations should repeat the above steps for the application service FWLZDEXP.

In addition, if your implementation has any hard-coding of either F1-DFLTAPS and FWLZDEXP in code that is not detectable by the Secured Objects zone, those references should also be updated to use F1-DFLT or a different application service that is appropriate for the business rule.

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 Utilities Customer Care and Billing product.

Mobile Application Framework Metadata

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 will be removed in a future release.

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 items will be removed in a future release.

- 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.

- To Do Entry Maintenance
 - toDoEntryCharGrid
 - toDoEntryDrillKeyValuesListGrd
 - toDoEntrySortKeyValuesListGrid
 - todoentrykeyvalue
 - todoentrymain
 - toDoEntryMaint
 - toDoEntryPopupAdd
 - toDoEntryPopupForward

- toDoEntryPopupSendBack
- Any help navigation keys
- Table Maintenance
 - metaDataTableFieldsGrid
 - metaDataTableMainPage
 - metaDataTableCFldsGrid
 - metaDataTableConstPage
 - metaDataTableMaint
 - metaDataTableRefByConstPage
 - metaDataTableFieldPage
 - Any help navigation keys
- Work Calendar Maintenance
 - workCalendarMaint
 - workCalendarMainPage
 - workCalendarHolidayGrid
 - Any help navigation keys
- Message Maintenance
 - msgMaintDetailsPage
 - msgMaintGrid
 - msgMaintPage
 - msgMaintTabMenu
 - Any help navigation keys
- Time Zone Maintenance
 - timeZoneMainPage
 - timeZoneTabMenu
 - Any help navigation keys
- Application Security Portal
 - flappsecTabMenu
- Display Icon Portal
 - displayIconRefMaint

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

Object	Data	Description/Comments
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
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.

Batch Run Statistics Portal Functionality

The **Batch Run Statistics** portal provides 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.

Configuration Migration Assistant Import Algorithm Plugin Spot

The Content Migration Assistant Import algorithm plug-in spot will be deprecated. It is recommended that you review any existing algorithms and create appropriate Pre-Compare algorithms instead.

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.