

Oracle® Financial Services Performance Analytics Release Notes



Release 8.1.2.0.0

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The Oracle logo, consisting of a solid red square with the word "ORACLE" in white, uppercase, sans-serif font centered within it.

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Preface

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

Topics:

- [Purpose of this document](#)
- [Intended Audience](#)
- [Access to Oracle Support](#)
- [Related Information Sources](#)
- [Additional Documents to Read](#)

1.1 Purpose of this Document

This document contains release information of OFS PA Applications Pack, Release 8.1.2.0.0.

1.2 Intended Audience

This document is intended for users of OFS PA Applications Pack, Release 8.1.2.0.0.

1.3 Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For more information, visit [My Oracle Support](#) or visit [Oracle Accessibility Learning and Support](#) if you are hearing impaired.

1.4 Related Information Sources

This section identifies additional documents related to the OFS IPA Application.

You can access the below documents online from the Oracle Help Center (OHC) [Documentation Library](#) for OFS PA Applications Pack:

- OFS Performance Analytics Application Pack Release Notes
- OFS Performance Analytics Applications Pack Installation and Configuration Guide
- OFS Performance Analytics Operational User Guide
- OFS Performance Analytics Business User Guide
- OFS Performance Analytics OBIEE Reports User Guide Release

[Performance Analytics Security Guides](#):

- OFS Institutional Performance Analytics Security Guide Release 8.1.x
- OFS Retail Performance Analytics Security Guide Release 8.1.x

[Performance Analytics Cloning Reference Guides:](#)

- [OFS Institutional Performance Analytics Cloning Reference Guide Release 8.1.x](#)
- [OFS Retail Performance Analytics Cloning Reference Guide Release 8.1.x](#)

[Data Protection Guide:](#)

- [OFS Performane Analytics Data Protection Guide Release 8.1.x](#)

1.5 Additional Documents to Read

Oracle Financial Services Profitability Analytics Applications Pack is built on the Oracle Financial Services Advanced Analytical Applications Infrastructure (OFS AAI).

See the following [OFS AAI Documents](#) as no separate documents are required at the pack or application level for Oracle Financial Services Profitability Analytics Applications Pack:

- [OFS Analytical Applications Infrastructure \(OFS AAAI\) Application Pack Installation and Configuration Guide Release 8.1.2.0.0](#)
- [OFS Analytical Applications Infrastructure Administration Guide Release 8.1.x](#)
- [OFS Analytical Applications Infrastructure User Guide Release 8.1.2.0.0](#)
- [OFS Analytical Applications Infrastructure Cloning Reference Guide Release 8.1.x](#)
- [OFS Analytical Applications Infrastructure Security Guide Release 8.1.x](#)

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

- [OFSAA Licensing Information User Manual](#)
- [OFS Analytical Applications 8.1.2.0.0 Technology Matrix](#)

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Introduction to OFS PA Applications Pack

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

- **Oracle Financial Services Analytical Applications Infrastructure:** In today's turbulent markets, financial institutions require a better understanding of their risk-return, while strengthening competitive advantage, and enhancing long-term customer value. Oracle Financial Services Analytical Applications (OFSAA) enables financial institutions to measure and meet the risk-adjusted performance objectives, cultivate a risk management culture through transparency, lower the costs of compliance and regulation, and improve insight into customer behavior.

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

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

- **Oracle Financial Services Institutional Performance Analytics:** Oracle Financial Services Institutional Performance Analytics (OFSIPA) is a Business Intelligence application to aid banks identify profitable and potentially profitable accounts and customer relationships in its Institutional/ corporate customer base. In particular, the customer 360 view of the application enables bankers to have a view of customers with respect to their finances, performance and profitability metrics, engagement, x-sell and channel propensities along with product behavior. All this can be compared at the customer segment and enterprise level. Fully loaded P&L's and actionable insights about customers and their relationship managers from the application enables banks to take timely and relevant strategy decisions in a rapidly evolving marketplace which is strongly customer centric.
- **Oracle Financial Services Retail Performance Analytics:** Oracle Financial Services Retail Performance Analytics (OFSRPA) is a Business Intelligence application to aid banks identify profitable and potentially profitable accounts and customer relationships in its Retail customer base. In particular, the customer 360 view of the application enables bankers to have a view of customers with respect to their finances, performance and profitability metrics, engagement, x-sell and channel propensities along with product behavior. All this can be compared at the customer segment and enterprise level. Fully loaded P&L's enable banks to take timely and relevant strategy decisions in a rapidly evolving marketplace which is strongly customer centric.
- **Oracle Financial Services Enterprise Financial Performance Analytics:** This application is based upon a dedicated reporting mart built on the Financial Services Data Model and displays Profitability results generated at the Management Ledger level by the Funds Transfer Pricing and Profitability Management applications. OFSEFPA leverages several components of OBIEE technology. It includes various aggregate Dashboards and Reports for the user to carry out Profitability Management based analytics at the level of Organization and Product.

See the subsequent chapters to know more about this release.

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

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Oracle Financial Services Institutional Performance Analytics

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

Topics:

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

3.1 New Features in this Release

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

1. Data Visualization Reports

Data Visualization (DV) provides a quick and effective way to communicate information in a universal manner using visual information. The DV stories have been packaged in the application in addition to the standard OBIEE Reports. The DV technology allows to play out interactions between various factors which are significant in the analysis enabling enhanced experience for the Business User.

2. Re-written User Documentation

The User documents (guides) for the IPA and RPA are integrated and then divided into role-based separate guides as follows:

- Business Operational User Guide
- Business Administrator User Guide
- Business User Guide
- API Reference Guide
- DV Analytics User Guide
- API Enhancements

3. API Enhancements

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

3.2 Bugs Fixed in this Release

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

3.3 Known Issues and Limitations in this Release

The known issues and limitations in the OFS Institutional Performance Analytics Application Release 8.1.2.0.0 are as follows:

- There are issues in the What-If Analysis screen concerning some operational aspects like accessibility of prior scenarios and chart readings.
- Some seeded bands have overlapping values.
- X-sell indicator logic is incorrect.
- Certain UX issues in the DV stories which are attributable to the limitations in the DV technology.
- Mapping issues with Limit Utilization and Rating SKey.

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Oracle Financial Services Retail Performance Analytics

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

Topics:

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

4.1 New Features in this Release

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

1. Data Visualization Reports

Data Visualization (DV) provides a quick and effective way to communicate information in a universal manner using visual information. The DV stories have been packaged in the application in addition to the standard OBIEE Reports. The DV technology allows to play out interactions between various factors which are significant in the analysis enabling enhanced experience for the Business User.

2. Re-written User Documentation

The User documents (guides) for the IPA and RPA are integrated and then divided into role-based separate guides as follows:

- Business Operational User Guide
- Business Administrator User Guide
- Business User Guide
- API Reference Guide
- DV Analytics User Guide
- API Enhancements

3. API Enhancements

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

4.2 Bugs Fixed in this Release

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

4.3 Known Issues and Limitations in this Release

The known issues and limitations in the OFS Retail Performance Analytics Application Release 8.1.2.0.0 are as follows:

- There are issues in the What-If Analysis screen concerning some operational aspects like accessibility of prior scenarios and chart readings.
- Some seeded bands have overlapping values.
- X-sell indicator logic is incorrect.
- Certain UX issues in the DV stories which are attributable to the limitations in the DV technology.
- Mapping issues with Limit Utilization and Rating SKey.

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Oracle Financial Services Enterprise Financial Performance Analytics

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

Topics:

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

5.1 New Features in this Release

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

5.2 Bugs Fixed in this Release

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

5.3 Known Issues and Limitations in this Release

There are issues in the What-If Analysis screen concerning some operational aspects like accessibility of prior scenarios and incorrect variances getting applied on the reporting lines.

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Oracle Financial Services Analytical Applications Infrastructure

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

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Hardware and Software Tech Stack Details

The hardware and software combinations required for OFS AAI 8.1.2.0.0 are available at [OFS Analytical Applications Technology Matrix](#).

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Licensing Information

For details on the third party software tool used, see the [OFSAA Licensing Information User Manual Release 8.1.2.0.0](#).