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Oracle Insurance Rules Palette Release Notes

The Oracle Insurance Rules Palette is a standalone application that can be used in conjunction with Oracle Insurance applications. The Rules Palette allows users to create and configure business rules that support their business process model. Plans hold related policies that share a set of business rules, plan rules, requirements, transactions, segments, plan data and plan values. Copybook functionality enables transactions and business rules to be used across multiple plans, leveraging existing information and reducing configuration time.

These release notes contain the enhancements that were made to the Oracle Insurance Rules Palette GA release 11.0.0.0, 2016.

Customer Support

For customer support, please visit My Oracle Support: https://support.oracle.com

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Enhancements in the Oracle Insurance Rules Palette

This section describes enhancements that were made to the Oracle Insurance Rules Palette GA release 11.0.0.0.

New Business Rules

UnifiedSearch

A new business rule **UnifiedSearch** is introduced, which combines all the different entity search mechanisms into single search mechanism. Unified search is available to access from each screen in OIPA, which improves the navigability across all the screens.

» It provides the flexibility to the configuror to alter the default entity, the order of the entities in the entity drop-down and search criteria against which the entity will be searched.

» It provides 'quick search' capabilities for more frequently searched entity and attributes that the user typically searches as the default search criteria. User has the flexibility to go to advanced search by adding more search criteria to get more refined results.

ShadowClient

A new business rule **ShadowClient** is introduced which can be used to change the status of the Client to shadow. This is an attached rule that enable the configuror to attach the rule to a company level activity. Processing the transaction to which this business rule is attached shall shadow the client. The rule will take a single client GUID or an array of client GUIDs as input and change the status of the client to shadow. If a single client GUID is passed, then it can be in the form of activity field or a math variable. Once shadowed, the client will not be visible / search-able.

Enhanced Business Rules

CaseScreen

The CaseScreen rule is modified to provide the ability in OIPA to create a new case and application using the "Case" option available under Central Add capability.

» The rule is modified to include <DisabledStatus> element with **CaseStatus** and **ApplicationStatus** attributes . This element dictates the combination of case status and application status codes which would trigger the lock-down of editable field. The configuror will have the flexibility to dictate whether or not the case fields should lock up based on combination of case status and application status.

» The <AutomaticCaseNumber> element dictates whether the case number should be generated automatically or not. If the tag is set to "yes" then the case number shall be generated automatically according to the format set in AutomaticCaseNumber BR.

AssignmentProcessing

» AssignmentProcessing rule is enhanced to add a configurable trigger to a rule that can alter the fund name order behavior to be case sensitive. A new attribute CASESENSITIVE is added to the <FundAssignmentOrder> element with "Yes/No" values. The CASESENSITIVE attribute is effective when the <FundAssignmentOrder> value is "FundName".

» The rule is modified to include the ability to order allocation funds in an "AllocationValue" order as the primary sort and a case insensitive fund name order as a secondary sort. "AllocationValue" refers to the AllocationPercent, PercentInAllocation, AllocationAmount or AllocationUnits as indicated by the AllocationMethod ("01", "02", "03", "04", "05").

InterestRateCalculation

» The InterestRateCalculation rule is modified to include the <MaintainMonthEnd> element with **Yes/No** values.
  » This element will be the trigger that signals to the system alternative anniversary and monthaversary results that are important to determine leap years and changes to interest rates.
  » The element applies to compound and simple interest calculations. The method determines the leap years is based on a reference date; or interest rate changes that are based on a duration from a reference date or an anniversary of a reference date.

» A new element <CalculationScale> is added to the rule. The value of this new element is any integer value from 0 to 100. The higher the number, the more decimal places will be given to "time". In rules where the new element has not been added, the default scale will be 10. This maintains the current behavior without the user needing to change the configuration.

Release Management

» Release packages that have been deployed to a target environment can now be "rolled back," i.e., un-deployed from the target environment.

» Rules Palette environments can now be given an "IVS Sequence" value in the Web Application Utility. This value assigns the environment a place in the release management sequence. When release packages are being deployed to multiple target environments, they must be deployed in the order specified by each environment's IVS Sequence value.

» Release packages are now given a deployment order. Each package must be deployed in the proper sequence or an error will occur.

Security

Rules Palette security is now environment-specific, rather than being shard across all environments and tracks in the same IVS database.

Palette

N/A

Deprecated Items

CaseScreen Business Rule

To make the case manager and underwriter application specific rather than case specific, the elements **<CM>** and **<UW>** are removed from the CaseScreen rule. The configuror will have to define these roles in PolicyScreen rule, which the application will pick up from the PolicyScreen rule.

Technology-Specific Enhancements

Please refer to the 11.0.0.0 version (part number E78460-01) information published in the Technology Stack section of the Oracle Technology Network (OTN).

Technology-Specific Enhancements