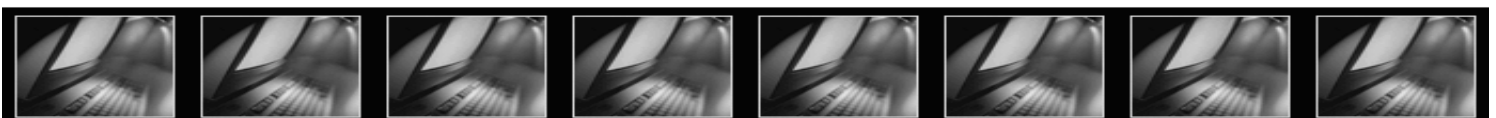


# Release Notes

*Oracle® Insurance Policy Administration*  
*Release 8.1*  
*E14444-01*  
*May 2009*



# Oracle® Insurance Policy Administration

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# Release Notes

## Overview

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The Oracle Insurance Policy Administration (OIPA) system is a rules-based line of business agnostic system that is built using modern web-based technology. Pre-configured product templates and product cloning functionality give carriers accelerated development times and improved speed to market. A common-calculation architecture allows calculations to be performed once and then reused.

These release notes contain the enhancements and fixes that were made to OIPA Release 8.1, 2009.

## Customer Support

For customer support please follow the link to My Oracle Support <https://metalink.oracle.com/CSP/ui/index.html>.

## Updates to Existing Functionality

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### Activity

- The Activity Result Screen will now display payout dollars for immediate annuity products (or deferred annuities in payout phase) instead of accumulation dollars.
- An enhancement to the Activity Result screen allows users to view the multifields data, when applicable, from the 'Entry Fields' tab of a processed activity along with all of the other fields currently viewable on that tab.
- An extension has been made to existing functional design that changes the Effective Date of an activity based on a 4:00pm cut off. This requirement gives OIPA a more robust means for limiting access to activities. Providing access to activities can be defined based on security role, time of day and activity.

### Allocations

- A change has been made to screens containing allocations. Previously, the Allocation Fund drop-downs in the OIPA system showed the first available fund. This makes it difficult for users to know which funds have already been defined. Now in the fund dropdowns, a new configurable option, if present, will cause the first available choice of fund (the default value) to be blank.
- Users can now blank out allocations at an activity and policy level. When WriteDefaultAllocations is used to copy activity allocations to any other level of allocations and the activity's allocation list is blank, then it should blank out the allocation list as well.

**Benefit Split**

- A new attribute was added to the DoBenefitSplitChange Business Rule, which specifies that Fixed Amount and Variable Amount should be added to the current BenefitSplit units and amounts. New value “AdditionalAmount” for existing attribute CHANGETYPE indicates that the existing BenefitSplit will be increased by an additional amount. Additionally, there are two new attributes: ADDVARIABLEAMOUNT, which has an amount value that is added to the Variable funds in the BenefitSplit, and ADDFIXEDAMOUNT, which has an amount value that is added to the fixed funds in BenefitSplit.
- Changes have been made to the BenefitSplit History Screen that allow the user to see the benefit split history when first adding benefit split records. The changes include checking the AsBenefitSplit table to see if there are any records with type code ‘51’. If not, benefit split history records with type code ‘05’ are added to the History screen. The previous Benefit History screen showed no history when the only “event” was adding benefit split history. With the new changes, the benefit split history displays history resulting from the calculation of the segment.
- Users can now specify benefit split allocation details within the CreatePolicy Business Rule. This allows split details to be divided between the existing policy and the newly created policy. These details include the source segment, benefit split source type, benefit split target type, and percent (math variable).

**Command Center**

- Plan Copy was updated so that it works with the AsCurrentVersion table. A new column was also added to the AsAllocation table.
- Version Generator was updated so that it works with the AsCurrentVersion table.

**Disbursement**

- When an activity is processed, the approval status of a disbursement is configurable and does not always have to default to UnApproved. When disbursement is generated from processing an activity that has a disbursement tag in its math section, prior functionality created a Disbursement activity with an ‘Unapproved status’ of ‘03’. The status is now configurable; and can be set to a math variable from the activity.

**Migration Tool**

- Migration Tool will update the new AsCurrentVersion table when migrating Versioned items.

### **Policy / Segments**

- Performance enhancements were made to the Segment Tab for faster and more efficient loading of the Segment Screen.

### **Role Configuration**

- Users now have the ability to restrict New/Save/Delete capability for an address by the address type, for any given security profile. In the security XML a new optional attribute has been added to the Button element. The attribute is named RESTRICTEDADDRESSTYPE. This attribute specifies all restricted address codes using a comma delimiter.
- Users can now configure edits in the RoleScreen using information stored in AsPolicy, AsPolicyField, AsClient and AsRole. The RoleScreen needs more specific math functionality in order to configure edits that are received when saving or changing role details. The RoleScreen business rule now has the ability to access other areas of the system including the AsPolicy, AsPolicyField, AsClient, and AsRole tables. These tables are accessible to the OIPA math engine in order to provide better functionality to the RoleScreen. The new format is very similar to the AssignRoleScreen business rule. In an effort to provide conformity, both business rules have been modified with this new format in order to pave the way for additional screen rules accessing the math engine in such a manner.
- Users can now access AsPolicy, AsRole and AsClient information in the role edit configuration. In the configurable edits there is currently access to the policy and policy fields. This access will be extended to role and role fields as well as client and client fields. There are three types of custom edits on the following actions: Delete, Save and New. When performing one of these actions on a role the role fields are valued prior to running the configurable edits.

### **Suspense, Suspense Batch and Suspense Refund Screen**

- Validation capabilities have been added to the Suspense Batch Screen. The Screen Rules can be configured to validate entry upon pushing the Save button.
- On the Batch Suspense Screen, clients now have the ability to display columns that are important to their business for the items in a Batch using the SuspenseBatchScreen business rule.
- Suspense items on Batch Suspense Screen are now ordered by Suspense Number instead of by Batch Number.
- Suspense Refund Search Screen has been made configurable via the creation of the SuspenseRefundSearchScreen business rule. The new rule defines what appears on the Suspense Refund Search Screen (enterable search criteria and return results) and is configurable based on clients' needs.

**Valuation**

- Implementation of a tolerance of 0.005 for unrounded numbers. Any number comparison that is less than .005 or less than one half a cent rounds to zero and it needs to be treated as such for comparison purposes.
- The OIPA system now uses the nearest Net Unit Value (NUV) when performing a quote during valuation. Previously, some values were blank since the effective date's Unit Values were not present at the time of the quote.
- Addition of the ability to have funds traded in terms of the fund level values. There was a need to have a configurable way of telling the code whether it should apply its calculations at the fund or deposit level. This was done by making two changes to the system: turning off deposit level rounding, which allows the ability to buy and remove a more precise level of units, and collapsing on funds during trades.
- The ability to value a policy using a date defined in the math of a transaction has been added. A new math variable type called ValuePolicy was created. This new type will allow a business analyst to value a policy with any effective date in the math section and use the results of that valuation as operands in other math calculations. The ability to access the results of this valuation using the colon-separated syntax that the current system valuation uses has also been added.

**Verification Quote Screen**

- Improved formatting within messages in the Verification (Quote) Screen for display purposes has been implemented. In the QuoteScreen business rule there are tags called <Label> that define a message to be displayed on the screen where a transaction is verified. When the FORMAT attribute is a sentence, the current configuration specifies that math variables can be contained in the message text by using a \$\$\$ delimiter. This format does not allow us to properly format the message without knowing what the math variable within the \$\$\$'s could be. To allow the proper formatting of the sentence's text, additional information will be given to the math variables contained within the \$\$\$ delimiters. A type to be placed after a comma within the declaration of the math variable will also be provided. The new syntax will follow this simple example:  
\$\$\$GrossAmount,Money\$\$\$.

## New Functionality

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### Comments

- The display of Comments associated with an activity has been added to the Splash Screen. The new functionality provides the ability to control what comments are displayed (i.e. by transaction, or other criteria, etc). Also included is the ability to prevent certain security roles from seeing comments. comments can also be configured to change dynamically when filter criteria changes.

### CopyBook Button

- A Copybook button is now displayed on the Business Rules screen Segment Name and Inquiry screens if the XML references a Copybook. On these three screens, if XMLData contains an uncommented <CopyBook> tag, a CopyBook button will be available on the screen. Pressing the CopyBook button will provide a new window with all referenced and nested CopyBook business rules and their XML in a drop down list. This provides a quick place to view and update CopyBook configuration.

### CycleMarkAndSweep for Cycle Processing

- This new database procedure was developed to support the multiple threading ability of the cycle process. This procedure accepts the machinename, cycleguid, typecode and number of returned rows from the cycle process. It then grabs rows that meet the cycleguid, typecode and entered number or rows to return criteria. It also sets each grabbed row's status code to '05' and the machine name to the entered machine name. It then returns the group of GUIDs to the cycle process. The process executes, concurrently, many times by different threads of the cycle process and cannot duplicate the return of any GUID.

### Index a Text Variable

- Added the ability to index into a text variable on a character by character basis through the use of TYPE="JAVASCRIPT." This functionality also allows you to replace, insert, and find the length of character values.

### Requirements Screen

- A new business rule called RequirementsScreen has been created to control the look and feel of the Requirements Screen associated with activities. This rule has all the required data to show the required date columns as mentioned in the Rule rather than showing all the columns by default. Validation check between these columns is also done by adding the Validate expressions tag in the rule. This tag validates the existence and relationship between the dates and will generate a user message if the validations are not met. Requirements can also be categorized to 'filter' the requirements that are displayed on the screen.



### **Version Control Tracking**

- Users can now track current versions in the base system database. This becomes important, in the event of a database copy and restore to another environment. A new database table was created called AsCurrentVersion. AsCodeRuleTypes table was also updated with the following: BusinessRules, Transaction, SegmentName, SecurityRole, InquiryScreen, File, and BatchScreen.

### **Webservice**

- A new webservice has been created. This new webservice accepts a policy number and then calls a function “process all” to effectively process all activities on that policy. The client will need to make an individual web service call for each policy.