

## **Oracle® Insurance Rules Palette**

### **Release Notes**

Version 9.1.0.0.0

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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 Policy Administration. The Rules Palette provides straightforward functionality that assists with configuration tasks. The Rules Palette mitigates the need to know XML and features user-friendly visual configuration tools.

These release notes contain the enhancements and fixes that were made to the Oracle Insurance Rules Palette Release 9.1.0.0.0, 2009.

### Customer Support

For customer support, please visit My Oracle Support:

<https://metalink.oracle.com/CSP/ui/index.html>.

## Fixes and Enhancements in the Oracle Insurance Rules Palette

This section describes fixes and enhancements that were made to the Oracle Insurance Rules Palette Release 9.1.0.0.0.

### Assignment

- New assignment type RemoveByFund was added.

### CopyBooks

- Assignment section CopyBooks were re-designed so that duplicate Math section tags are not created.
- General pane elements can now be edited in an Entire Transaction CopyBook.

### Chart of Accounts

- When the Chart of Accounts Criteria and the Chart of Accounts Results business rules are not configured, the wizard will still move through the Criteria and Results steps.
- A warning message was added for the user when the COAScreen rule is present but is not configured.
- On a Suspense Entity, when the user moves backwards in the wizard from the Entry step to the Entity step and changes the Entity type to Transaction, the values in the Entry, Criteria and Results steps will reload.

- When the user moves backwards from the Entity step to the COA step and selects a different company, the values in the Transaction field of the Entity step reload to those under the new company.
- A warning message was created to alert the user when a company has no transactions under it.
- A warning message was created to alert the user when a plan is not selected on the COA step of the wizard.

### **Environment Creation**

- Users have the option to select automatic log-in when creating the environment connection. If the user clicks this check box, the application will automatically log the user in after the environment connection is successfully created.

### **Global Explorer**

- A Refresh right-click option was added to the Business Rules node.

### **Help System**

- The Rules Palette help system and the XML Configuration Guide were added to the Rules Palette application.

### **Release Management**

- "Put on Hold" right-click option was removed from empty configuration packages.

### **Security**

- Security was added to the transaction Quote button.

### **Segment Screen**

- New syntax was added to the Segment screen to change how XML is written when using the visual editor to create the segment table. Some additional elements were also added to the visual editor.

### **System Date Editor**

- A system date generation wizard was added to facilitate the entry of system dates.

### **Transactions**

- Quoting support was added so that activities in the Oracle Insurance Policy Administration application can be virtually processed. Users can view the outcome of an activity without actually having to process it.
- A left to right scroll bar was added to the Spawn and Assignment panes.

### **Version History**

- Version History nodes were removed from Admin Explorer features since they were unnecessary.

### **Web Services**

- Web Service security was added for the environment creation process. Database user IDs and passwords are now required.
- Security was added to the Remote Debugger Web Service. The Web Application Utility now has a user ID and password field for remote debugging.