



Aurea[®] Insurance Process Management Release Notes version 2018.1

Notices

For details, see the following topics:

- [Notices](#)
- [Third-party acknowledgments](#)

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Welcome to Aurea[®] Insurance Process Management 2018.1

These Aurea[®] Insurance Process Management 2018.1 release notes include the following information:

- [New features for Aurea[®] Insurance Process Management \(IPM\) 2018.1](#) on page 7
- [Supported Platforms](#) on page 7
- [Known Issues](#) on page 11
- [Fixed Issues](#) on page 9

More detailed information about the features in this release is available in the product's documentation. For any upgrade or purchase inquiries, please consult your sales executive or contact sales@aurea.com.

New features for Aurea[®] Insurance Process Management (IPM) 2018.1

Listed below are the features and enhancements added in Aurea[®] Insurance Process Management 2018.1:

- **Configuring Custom Case Status:**
This change provides for a global configuration for key tasks in each workflow to allow the case status to be set to the carrier-defined value. For example, when the Onboarding workflow sends the producer an email with the application details, the case status could be set to "Application Pending" instead of "In Progress".
- **Page Loading Indicator:**
Added a page loading indicator to prevent edits while the page is still loading.
- **Background Process Indicator:**
Added a background progress indicator to key pages when the submit button is selected to indicate that work is being done by the system.

Supported Platforms

The following table lists the software platforms supported by Aurea[®] Insurance Process Management.

Table 1: Supported platforms

| Category | Software |
|--------------------|--|
| Operating system | Microsoft® Windows® Server 2012 R2 Standard/Datacenter Microsoft® Windows® Server 2008 R2 Standard/Enterprise, (x86 64) Microsoft® Windows® 7/ Windows® 8.1/ Windows® 10 Professional/Enterprise on Intel® based platforms (x86 64) |
| Application server | JBoss® EAP 6.3 WebSphere 8.5.5.1 |
| Database | Oracle® 11g r2 with Oracle® JDBC Driver |
| JDK | Oracle® JDK 1.7.0_55 |
| Browser | MS Internet Explorer (IE) 9.0/10/11 (64 bit) (Requires Java plugin 1.7.0.55; Supported on Windows only; Needs to disable MS JVM), Microsoft Edge 41.16299.402.0 |
| Open Office | Versions 3.4.1 and 4.1.2 Note: Open Office should be installed on the same machine as that of CX Process Business Manager. |
| DCM | 2015, 2016.1, 2017, 2017.1, 2018 and 2018.1. |

Note: For a complete listing of platforms supported by Aurea® CX Process Business Manager® 2017 R4, refer to the *Supported Platforms Guide*.

Certified Platforms

The following table lists the software platforms on which Aurea® Insurance Process Management 2018.1 is certified.

Table 2: Certified platforms

| Category | Software |
|--------------------|--|
| Operating system | Microsoft® Windows® Server 2008 R2 Standard/Enterprise, (x86 64) |
| Application server | JBoss® EAP 6.3 WebSphere 8.5.5.1 |
| Database | Oracle® 11g r2 with Oracle® JDBC Driver |
| JDK | Oracle® JDK 1.7.0_55 |

| Category | Software |
|-------------|---|
| Browser | MS Internet Explorer [®] version 9/11 Microsoft Edge 41.16299.402.0 |
| Open Office | 3.4.1 and 4.1.2 |

Fixed Issues

The list of fixed issues in Aurea[®] Insurance Process Management 2018.1:

Add Agreement Participant

- **AS-5593:** Add Agrmt Participant: Status start date and end dates are not reflected in DCM.

Add Appointment

- **AS-6134:** Initiate Add Appointment process - buttons in non standard format.
- **AS-6774:** Add Appointment: Get license from NIPR task gets suspended when case is initiated by agent user.

All Workflows

- **AS-5509:** Approval process: PartyID is empty for Approval process
- **AS-5750:** Data entered is lost on exiting without clicking Save button
- **AS-6421:** Initiate through CSV: Text in header menu on Confirmation page is cut off
- **AS-6501:** Sometimes case name is not set correctly when the case is initiated through CSV or API
- **AS-6753:** Approval task UI is distorted when case is initiated through API/CSV

Dashboard

- **AS-6077:** Cases widget: Search on Task Status is not working
- **AS-6079:** Cases widget: All available statuses are not shown in Task Status drop down
- **AS-6139:** Case Search: Search using custom status should not include "Completed" and "Removed" state instances
- **AS-6775:** 'Successfully' word is misspelled in the confirmation message while Reassigning task

Dispute Resolution

- **AS-6772:** Dispute Resolution: Cancel button is not working

Hierarchy Transfer

- **AS-5547:** HT: Incorrect case details after clicking Cancel on case initiation page
- **AS-6080:** HT: Incorrect case name on completing Initiation Data after fix action
- **AS-6502:** Case name for Hierarchy Transfer process contains _ instead of #
- **AS-6784:** Hierarchy Transfer error handling step in BatchErrorHandler process not able to process date data correctly.

LetterManager

- **AS-6392:** LetterManager: Analyst and Administrator dataslot values passed from parent process are overwritten by configuration values.
- **AS-6417:** Cancel button in ReviewUpdateLetter step of LetterManager process is not in standard format.

Onboarding

- **AS-5395:** Initiate Through CSV - with header: Analyst Initiation - Organization Party - Instance name is NOT in the format that is mentioned in `OnBoarding.conf` file.
- **AS-5576:** Error message too close to text box
- **AS-5679:** When the browser is zoomed in, you lose the scroll bars on the workflow viewer and you can't navigate around the workflow.
- **AS-5680:** There is no close button on Workflow view window, when browser is zoomed in.
- **AS-5698:** Reonboarding allowed for Active Party
- **AS-6344:** "Select Agreement Participant" adapter step in Onboarding process getting suspended if ebms user configured with password other than ebms
- **AS-6419:** Agreement Participation and Component Participation data are not updated for party onboarded using Onboarding process
- **AS-6420:** Initiate through CSV: OB case can be created for party having Active status
- **AS-6426:** Onboarding; Exception when first name > 30 characters
- **AS-6432:** Onboarding: Party status does not change to Pending when initiated using Initiate through CSV process
- **AS-6527:** Onboarding: Case name is set incorrectly if party type is changed while creating instance
- **AS-6650:** Incorrect instructions on Perform Eligibility Review step in Onboarding process.
- **AS-6651:** Incorrect instructions on AgentReviewNotRecontractable step in Onboarding process.
- **AS-6652:** Incorrect instructions on ViewRegulatoryAction step in Onboarding process-1
- **AS-6654:** Incorrect instructions on ViewRegulatoryAction step in Onboarding process-2

Other

- **AS-6241:** IPM-DCM integration: DCM URL is hard coded in `logoutFromDCM.jsp`, it should be read from configuration file.
- **AS-6391:** Error message displayed in `autodeploy.log` file while creating new user/groups
- **AS-6656:** IPM-DCM Integration: With latest version of Chrome or Firefox browser, the IPM page is not displayed in DCM portal.
- **AS-6745:** "Exception Notification" step from InsuranceErrorHandler process gets suspended.

Termination

- **AS-5546:** Termination: Select upline search returns incorrect results
- **AS-5562:** Termination > Select Participant: Error message is shown on searching with multiple fields
- **AS-5822:** Termination - Downline action doesn't apply when the party has no Downline
- **AS-5823:** Incorrect fields shown on Termination Target Position Search
- **AS-5833:** Incorrect fields shown on Termination Target Position Search Results

Update Contact Point

- **AS-5419:** Contact Point - Leading 0s not displayed on Tax Id Contact Point Party Search Results
- **AS-5643:** Delete functionality for a newly added Contact Point for a Person Party is not working
- **AS-6424:** On re-opening Update Contact Point task after saving, user has to search for party again to view the contact point update
- **AS-6425:** Contact Point Manager: Task can be completed without selecting any party
- **AS-6530:** Rejection Letter step missing in Contact Point Manager process
- **AS-6771:** CPM: Deleted contact point is shown in contact point grid

Known Issues

The following list provides the known issues and limitations in Aurea[®] Insurance Process Management 2018.1:

- **AS-2452:** Hierarchy Transfer - Agency Initiation should only show own Agents

