Oracle Policy Automation
The intelligent advice platform

Release 19A features and benefits
(February 2019)

V1.00
Program agenda

1. Overview of Oracle Policy Automation
2. New features in 19A release
3. For more information
Safe Harbor Statement

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle’s products remains at the sole discretion of Oracle.
Program agenda

1. Overview of Oracle Policy Automation
2. New features in 19A release
3. For more information
Modern service delivery requires many types of policies

- regulations
- government policies
- service and advice rules
- organizational best practices
- legislation
- product decisions and eligibility rules
Customers expect simple, accurate and personalized advice
Smarter Advice

Personalized
Agile
Transparent
Mission 1: Provide

Personalized Experiences

Directly answer the individual’s question
With OPA you can Tailor customer experiences with contextualized, personalized immediate advice
Mission 2: Provide Agility

Quick to create

Easy to deploy across all channels
With OPA you can

Author rules in natural language using familiar tools

Write once deploy across multiple languages and channels
Mission 3: Provide Transparency

See how decisions were made and policies applied
With OPA you can

**Empower** business users to write and review rules

**Instantly** explain every decision
Oracle Policy Automation overview

Oracle Policy Automation Cloud Service

- Mobile
- Interviews
- Analytics
- Modeling
- APIs
- Connectors

Other cloud applications

On-premises applications
Oracle CX
Complete customer experience platform

Integrated Customer Experience Foundation
- Social Network
- Mobile
- Analytic KPIs & Dashboards
- Predictive Analytics
- Integrations
Program Agenda

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Highlights of Policy Automation 19A release

✓ Use uploaded images in generated forms
   Meet branding needs and simplify workflows

✓ Use any interview data in extensions
   Simplify custom navigation development

✓ Chat API
   Conversational auditable advice, anywhere
Meet branding needs and simplify workflows

19A: Use uploaded images in generated forms

**CAPABILITY HIGHLIGHTS**

- Add image upload groups in form templates to indicate the location in a form where an uploaded image should appear

**KEY BENEFITS**

- Use uploaded brand logos to generate tailored advice documents for particular customers
- Include uploaded photos in generated forms, to simplify workflow of environmental assessments, student applications, credential validation and more

Uploaded photo embedded in generated form
Simplify custom navigation development

19A: Use any interview data in extensions

**CAPABILITY HIGHLIGHTS**
- Define which fields will be available on every screen for use by custom interview extensions
- Customize navigation and other behavior of interviews by accessing those available fields in custom interview extensions

**KEY BENEFITS**
- Provide advanced navigation experiences without adding complicated custom authoring requirements
- Ensure information security is preserved by only exposing fields that are needed to drive those custom experiences
Conversational auditable advice, anywhere

19A: Chat API

**CAPABILITY HIGHLIGHTS**

- **Use the provided Chat API** to develop personalized and reliable chat advice experiences, including ability to easily return to previous answered questions
- **Leverage OPA’s intelligent screen and question authoring** to make the conversational advice easy to deliver and easy to maintain
- **Create service requests** and much more using standard OPA connectors

**KEY BENEFITS**

- **Reduce maintenance costs for chat-based service and advice** with the ability to put OPA interviews behind any digital assistant intent
- **Define a single auditable advice flow** and leverage it through multiple chat-based interfaces, including Oracle Digital Assistant, Facebook Chat, and more
Feature Deep Dive

Use any interview data in extensions
Use any interview data in extensions – Overview

Simplify custom navigation development

- Easily define which interview information should be available on every screen
- Get at this data from within any interview extension
- Deliver flexible and intuitive experiences to advice getters, including custom navigation, custom controls and more
Use any interview data in extensions – Setup

Securely choose data to be available on every screen

 ✓ Define list of the information to be available on every screen
  - Create a file called `opm.extension.data.json`
  - Include in the file a JSON array of attribute and relationship names
  - Refer only to data that is OK for interview user to know
  - Place the whitelist file in Interview > Styles > Custom Files directory

```javascript
["biz_Type",
 "biz_LegalStructure",
 "biz_Status"]
```
Use any interview data in extensions – Write Extension

Get at data from within any interview extension

OraclePolicyAutomation.AddExtension({
    customHeader: function(interview) {
        return {
            mount: function(el) {
                var wrapperSection = document.createElement("section");
                // add HTML elements to section, and initialize them
                // ...
                el.appendChild(wrapperSection);
            },
            update: function() {
                // get all the available data, and use it to set HTML content
                var extensionData = interview.getExtensionData();
                bizTypeText.textContent = extensionData.biz_Type;
                bizTypeDiv.style.visibility = extensionData.biz_Type
                -- null ? "hidden" : "visible";
                legalStructText.textContent = extensionData.biz_LegalStructure;
                legalStructDiv.style.visibility = extensionData.biz_LegalStructure
                -- null ? "hidden" : "visible";
            }
        }
    }
});

✓ Use JavaScript API to get at all the listed data, from any screen
  ▪ Develop any interview extension type – customHeader, customInput etc.
  ▪ Retrieve whitelisted data using getExtensionData(), or getValue()
  ▪ Extension data returned in JSON format like Batch Assess REST API

✓ Use data for any purpose: e.g. display it, perform client-side calculations, or call a REST API
Use any interview data in extensions – Interview experience

Deliver intuitive experiences to advice getters

- Deliver a flexible experience to interview users
  - Display custom headers that summarize information regardless of which screen it was collected on
  - Change the way input options are displayed depending on selections made earlier in the interview
  - Perform advanced custom rendering that uses any data from the interview
Feature Deep Dive
Chat API
Chat API – Overview

Conversational, auditable advice, anywhere

- Provide automated advice to customers through chat
- Create Service Requests in Service Cloud, and much more
- Compatible with digital assistants such as Alexa, Cortana etc.
- Flows are designed as OPA interviews by policy experts
  - Deploy to the chat channel, and integrate using the provided API
Chat flows are authored just like OPA web interviews

- Use Oracle Policy Modeling to define the screens of questions, and write decision rules
- Use logic to dynamically control which questions to ask
- Map data into and out of any connected application (Service Cloud, Engagement Cloud or other)
- Define forms to generate and attach to Service Requests etc.
Chat API – Deploying interviews

Easily publish any interview for integration with chat interfaces

- Simple to deploy
  - Deploy to OPA Hub like any other policy model
  - Enable the Chat channel
  - Create an API client with the Chat Service role
  - Use the Chat API HTTP endpoint to interact with JSON chat API
Chat API – Build chat experiences

Simple API that provides a lot of power

<table>
<thead>
<tr>
<th>OPA Chat API</th>
<th>Service Cloud or other app</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send to JSON Chat API start URL</td>
<td>Load</td>
</tr>
<tr>
<td>• Bearer token of API client</td>
<td>Save</td>
</tr>
<tr>
<td>• initid if required to identify user</td>
<td></td>
</tr>
<tr>
<td>• Information/question to show next</td>
<td></td>
</tr>
<tr>
<td>• Investigate URL to submit response</td>
<td></td>
</tr>
<tr>
<td>Send to investigate URL</td>
<td></td>
</tr>
<tr>
<td>• Response from customer</td>
<td></td>
</tr>
<tr>
<td>• Or go back to previous question</td>
<td></td>
</tr>
<tr>
<td>• End of interview reached</td>
<td></td>
</tr>
</tbody>
</table>

- **Simple API for each chat session**
  - Start any number of chat sessions
  - Each session keeps track of answers, and what needs to be asked next

- **Interacts with data as needed**
  - Automatically pre-load, query and submit to the connected application

- **Most control types are supported**
  - Provide lists of choices, explanations, images, form download links
  - No signature or captcha controls
Chat API – Integrate with digital assistants

Embed in any customer facing interface

- Flexible integration
  - Custom integrate directly to Facebook Messenger, WeChat etc.
  - Can use Alexa or Google to provide a spoken assistant interface
  - Use Oracle Digital Assistant to map intents onto OPA and support multiple different assistant interfaces

- Note OPA does not have any NLP
  - Exit phrases and mapping to data values must be done by harness that calls OPA (e.g. to convert “day after tomorrow” to an actual date value)
Other Enhancements
Other enhancements

**Interviews**
- Resume interviews when some data can’t be loaded
- Custom button control extensions

**Analytics**
- Checkpoint inspection API

**Policy Lifecycle**
- Inclusions report

**Mobile**
- Mobile Answer API
- URL scheme for launching Service Cloud assessments
Resume interviews when some data can’t be loaded

Simplify the deployment update cycle

- Deploy data model changes while checkpoints are in use
  - Allow interviews to resume even if some data won’t load in new model
  - On upgrade, 18D projects default to strict (18D) behavior
- Service Cloud users can restart even if checkpoint resume fails
  - If strict loading is on and checkpoint resume fails, message provides a link for user to start a new interview
  - Can configure this message
Custom button control extensions

Customize interview button appearance and behavior

- Use interview control extensions to customize button behavior
  - Extensions for Next, Back, Restart, Exit, Add and Remove entity instances, and upload Add buttons
  - Methods to get the current screen, find out which buttons should be shown on the screen, and to get each button’s caption
  - Also a method to invoke the add file dialog for use by custom upload Add buttons
Checkpoint inspection API

Perform custom analytics on saved interview progress

- Look inside any stored checkpoint
- Analyze abandonment patterns and other behavior

To use OPA Hub Checkpoint API:
- Pass in Service Cloud or Web Service Connector checkpoint data
- Data returned is described using the project’s data model names
- Missing names get unique ids – note these may change between versions
- Includes attachments, if present
Inclusions report

Ensure all projects are using correct versions of shared assets

- Easily check whether a project is using correct inclusion versions
  - Generate from the OPA Hub Repository tab or Policy Modeling Project | Inclusions.
  - Generates a .csv file that lists the inclusions in each repository project
  - Shows the included version and the latest available version for each
  - Timestamp lets you check when report was generated
Mobile Answer API
Integrate flexible decision making into mobile applications

- Validate configurations, shopping carts or other application data without showing an interview
  - Answer API included with the OPA Mobile SDK
  - Pass in data that you have loaded into your custom MAF application
  - Get answers using downloaded rules from a deployed OPA policy model
  - Works with the Web Service Connector metadata model (Engagement Cloud, Siebel, custom)

GetInputDataDefinition
- Returns data required to get answers

GetAnswer
- Pass in required data; get answers!
URL scheme for launching Service Cloud assessments

Provide seamless field service assessments on disconnected mobile devices

Before going on site

- Download assessments into OPA mobile app

When conducting job on site

- Launch OPA mobile app
- Sync assessment data when reconnected

Integrate OPA Mobile app with other field service applications

- Immediately switch to OPA mobile app using published URL scheme
- Provide the ID of a Service Cloud assessment (interview) to launch
- Assessment must have been pre-downloaded by OPA Mobile App
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Where to get more information

OPA Generally

Documentation

News, Discussion and Updates
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Integrated Cloud
Applications & Platform Services