Oracle Intelligent Advisor

Release 20C Features and Benefits (August 2020)

V1.0
Program agenda

1. Overview of Intelligent Advisor
2. New features since last 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, timing, and pricing of any features or functionality described for Oracle’s products may change and remains at the sole discretion of Oracle Corporation.
Program agenda

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Customers expect service that is

- simple
- accurate
- personalized
Which loan product is best for me?

Do I meet the language requirements for my course?

Am I eligible for an upgrade? Can you recommend a product based on my needs?

What is my new insurance premium based on my change in circumstances?

Am I eligible for compensation? If so, how much?

How much rental subsidy am I eligible for?

How is my bonus incentive calculated?
Intelligent Advisor

Empower organizations to delight customers with simple, insightful, transparent advice

Enable business experts to automate service experiences and processes as part of Oracle’s CX Suite
Key Capability

Personalized advice for customers and agents

Deliver intuitive customer advice with contextual online forms and chatbot dialogs

Transition seamlessly between self-service and call center interactions
Key Capability
Transparent decisioning for everyone

*Explain* all advice, to customers, to agents and for auditing purposes

*Generate high fidelity forms* that capture data and decisions

*Optimize* experiences with interview analytics
Key Capability
Agile authoring for business experts

Configure rules and advice experiences transparently

Easily integrate with other applications
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Release highlights

- **WCAG 2.1 compliance, including auto fill input purpose**
  Adherence to the latest accessibility standards on a wide range of devices

- **Batch decision reports, assessment rate charts and timing details**
  For auditable decisions and performance transparency using REST API

- **Enhanced interview styling extensions for entity controls**
  Customize data entry experiences for object lists

- **Rule profiling and test case execution reports**
  To find opportunities for performance improvements and testing gaps
Capability Highlights
- **Check for WCAG 2.1 compliance** when authoring interviews
- **Tag input fields with auto fill input purpose**, so browsers can help with pre-populating the most relevant information (or with none)
- **VPAT for Intelligent Advisor** now fully conforms accessibility to WCAG 2.1 (minor exceptions only for some generated forms)

Key Benefits
- **Satisfy even the most demanding accessibility requirements** with Intelligent Advisor across all functionality including authoring and consuming advice interviews

Up to date accessibility for all users

20C: WCAG 2.1 compliance, including auto fill input purpose

20C: WCAG 2.1 compliance, including auto fill input purpose

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Easy integration of auditable headless decision making

20B: Decision reports for Determinations Batch REST API

Capability Highlights

- **Obtain detailed explanations** for single and batch decisions made via Intelligent Advisor Determinations Batch REST API

- **Configure the amount of detail** to include in the explanation, for each decision attribute

Key Benefits

- **Simplify integration** by standardizing on REST APIs for all headless decisioning use cases, even when detailed audit trails are needed of how each decision was reached

- **Strike the right balance between speed and size** of audit reports according to particular use case requirements

```json
"child_improvements": {
  "id": "dn:8", "attributeId": "child_improvements", "value": true, "text": "There are improvements that Homer could make to Bart’s diet.", "entityId": "child", "instanceId": "children-1", "type": "boolean", "children": [
    {
      "id": "dn:1", "attributeId": "00f9f03f-5e82-4a5f-bcb5-6a537218f6d8", "value": true, "text": "Bart needs to eat more grains.", "entityId": "child", "instanceId": "children-1", "type": "boolean"
    },
    {
      "id": "dn:2", "attributeId": "baf84db-b847-4e6c-923f-5952598eaf6b", "value": true, "text": "Bart needs to eat more vegetables.", "entityId": "child", "instanceId": "children-1", "type": "boolean"
    },
    {
      "id": "dn:3", "attributeId": "0e3cbf5d-14d4-4d6f-9b2e-c471602b48a8", "value": true, "text": "Bart needs to eat more fruit.", "entityId": "child", "instanceId": "children-1", "type": "boolean"
    }
  ]
}
```
Understand headless decision service performance over time
20B Monthly Update 2: Assessment rate statistic for decision services

Capability Highlights

- **View the assessment rate** for decision services over time, as a chart, as a table or as downloaded data
- **Compare the assessment rate** across project versions, and between different projects

Key Benefits

- **Identify whether throughput changes were caused by new project versions** or might be caused by other factors
- **Easily provide evidence to business stakeholders** of throughput capabilities of Intelligent Advisor
Understand detailed behavior of REST API calls
20B Monthly Update 2: Per case timing and queuing statistics

```
{
    "cases": [
        {
            "@Id": 1,
            "@time": 0.40,
            ...outcomes...
        },
        ...more cases...
    ],
    "summary": {
        "casesRead": 10,
        "casesProcessed": 10,
        "casesIgnored": 0,
        "processorDurationSec": 2.62,
        "processorCasesPerSec": 3.02,
        "processorQueuedSec": 0
    },
    "links": [
        ...link info...
    ]
}
```

**Capability Highlights**
- **12.2.20 batch REST API version** includes @time and processorQueuedSec metrics

**Key Benefits**
- **Capture case-level timing** data for further analysis of how data size or other factors affect performance
- **Optimize total load sent to Batch REST API** by understanding and minimizing the amount of time requests spend queued
Customize data entry experiences for object lists
20B Monthly Update 2: Enhanced interview styling extensions for entity controls

Capability Highlights
- Selectively control both format and behavior with standard interview extensions when entering multiple records
- Both portrait and tabular entity collect layouts are supported

Key Benefits
- Display read-only rows when collecting additional data
- Confirm or prevent deletion of sensitive data
- Streamline data entry by copying previous row
Find opportunities for decisioning speed improvements

20C: Rule execution profiling report

### Capability Highlights
- **Report where time is spent** when simulating batch data running through a headless decision service.
- **Use standard tools like Excel to compare timing results** to identify where performance changes between versions.

### Key Benefits
- **Identify rule logic that could benefit from optimization** to improve batch processing times.
- **Build understanding of the performance of different rule structures** to help guide future development.
Detect performance changes and identify testing gaps

20C: Test case execution statistics

Capability Highlights

- **Time taken to run all test cases** is automatically recorded, allowing easy comparison across versions

- **Profiling report .csv file** also generated automatically, with details of how long is spent testing each individual rule

Key Benefits

- **Ensure performance stays high between releases** by understanding when and where rule changes cause slowdowns

- **Improve test coverage** by filling gaps where reports show rules are not currently being tested

![Test case execution statistics](image)
Other Enhancements
Empower non-technical users to review administrative history

20B Monthly Update 1: Download audit log from Intelligent Advisor Hub UI

Capability Highlights

• Obtain detailed explanations for single and batch decisions made via Intelligent Advisor Determinations Batch REST API

• Configure the amount of detail to include in the explanation, for each decision attribute

Key Benefits

• Meet requirements to review change and access history without needing technical skills

• Quickly produce reports for updates to users, deployments, projects, connections or any other Intelligent Advisor object type
Simplify lifecycle as projects move to production

20C: Branch repository projects

Capability Highlights

- **Branch a project** to create an independent copy in Intelligent Advisor Hub repository, without using Policy Modeling desktop tool
- **Clear link to the original project version** it was branched from

Key Benefits

- **Simplify the release lifecycle** by quickly creating separate projects for ongoing development vs. the version being finalized for release
- **Understand lineage of projects** to ease future change tracking and troubleshooting
And more...

- Experience fresh and consistent documentation
  - Updated user guide look and feel

- Simplify the authoring lifecycle for integrated interviews
  - Interviews can now auto-discard any loaded data that is invalid
  - CX Sales and B2B Service connections auto-update to latest version
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Where to get more information

Intelligent Advisor Generally

Documentation

News, Discussion and Updates
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