Oracle Policy Automation
A Modern Enterprise Policy Automation Solution
Features and Benefits
August 2015
Program Agenda

1. Overview of Oracle Policy Automation
2. New features in August 2015 release
3. For more information
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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.
Challenges in service delivery

60% of issues that end up as a call didn’t start that way\(^1\)

Are your customers able to self-serve effectively?

46% of customers say their 1\(^{st}\) choice is something other than the phone\(^2\)

Do you offer multi-channel service for complex inquiries?

29% of companies say inflexible technology prevents adapting to new ways of doing business.\(^3\)

How quickly can you adapt to change?

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\(^1\) Sales and Service Excellence, Effortless Experience, Nick Toman, 1 Oct 2013.
\(^2\) CFI Group, Contact Center Satisfaction Index 2013.
\(^3\) Oracle CX Study, February 2013.
Modern service delivery requires many types of policies

- Service and Advice Rules
- Organizational Best Practices
- Regulations
- Legislation
- Government Policies
- Product Decisions and Eligibility Rules
Organizations and IT struggle to adapt to policy changes
Inconsistent policies impact the organization

95% of organizations state that policy change remains predominantly manual

34% of organizations say inconsistent policy implementation caused poor customer satisfaction

Sources: Economist Intelligent Unit Survey
The service automation spectrum

<table>
<thead>
<tr>
<th>Low Complexity, Low Benefit</th>
<th>Typical</th>
<th>Benchmark</th>
<th>High Complexity, High Benefit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Traditional Development, Static Forms</td>
<td>Policy Automation: Dynamic, Policy-Based</td>
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<td></td>
</tr>
<tr>
<td>Anonymous Browsing</td>
<td>View Personal Information</td>
<td>Find General Answers</td>
<td>Update Personal Information</td>
</tr>
</tbody>
</table>

Objective: Use policy automation to automate high value business functions
Policy Automation enables consistency and agility

Deploy up to date policies directly into service experiences

Sources

- Product and service definition rules
- Regulations
- Company policies

Managed, Interactive Policy Models

Deployment

- Self-service, mobile
- Chat
- Call center
- Any other apps
Policy Automation for Oracle Service Cloud

Agents

Customers

Agent Desktop

Customer Portal or any other web site

Policy Automation Cloud Service

Policy Modeling

Microsoft Office

Policy Experts

✓ Provide personalized web-based advice for customers and agents

✓ Manage the policy lifecycle with streamlined cloud-based administration and deployment

✓ Model policies and end user interviews in a business-friendly desktop experience

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Personalize Your Customer Interactions

Dynamic Interviews

Personalized Advice
- Provide precise advice tailored for each customer
- Collect customer data more accurately and efficiently

Intelligent Interviews
- Build and pre-fill Interviews to only show relevant data and fields

Cross Channel Consistency
- Ensure a consistent experience regardless of channel – self-service, call center, mobile, or in-person

Personalized Explanations
- Provide documents that record data provided and explain decisions
Empower Policy Experts

Rule Modeling

Natural Language Policy Capture
- Model rules in Word and Excel
- Share easily with any policy expert

Intuitive Interviews
- Design interview layout and organize interactive advice screen

Policy Debugging
- Test before deploying

Built-in Data Mapping
- Out of the Box Integration to Oracle Service Cloud
- Easily map to data in other systems
Build Trust through Transparency
Compliance Management

Policy History Tracking
- Empower agents to explain why a decision was made
- Avoid customer complaints

Handle New Obligations
- Easily manage changes using the structure and wording of the source material

Decision Audit Reports
- Empower auditors with detailed explanations of how each rule was applied for every customer decision
- View easily in a report
Policy Quality
- Leverage built-in quality tools to ensure policy changes converge quickly

Multi-language Support
- Create policies in your customer’s preferred language with streamlined translation management

Seamless Collaboration
- Collaborate between stakeholders
- Avoid conflicts
- Share changes
- Deploy the latest policies quickly
Make Consistent Decisions Anywhere
Integration Services

Easy to Integrate
- Integrate decision making with standard APIs to other applications or processes
- Deliver consistency across legacy and cloud architectures

Mobile Ready
- Deploy interviews to mobile devices
- Deliver policies to all parts of your organization
Understand the Impact of Policy Changes

Policy Analytics

Understand Impact of Revisions
- Easily analyze new or changes policies
- View the impact as it relates to each of your customers prior to changing

Policy Refinement
- Analyze and adapt policy outcomes to avoid unexpected results
- Provide feedback to policy makers

What-if Analysis
- View potential policy outcomes and impacts
- See outcomes side-by-side
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### New Features in August 2015 Release – Summary

<table>
<thead>
<tr>
<th>Feature</th>
<th>Benefit</th>
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</thead>
<tbody>
<tr>
<td>Write inferred entity rules in Excel</td>
<td>Simplify reference data maintenance</td>
</tr>
<tr>
<td>Auto complete as you type for attribute substitutions</td>
<td>Improve speed and lower cost of interview authoring and maintenance</td>
</tr>
<tr>
<td>Finnish and Turkish parsers, custom rule languages, and override attribute text</td>
<td>Easily write rules in even more languages!</td>
</tr>
<tr>
<td>Upload attachments to objects other than global, and to custom Service cloud objects</td>
<td>Collect evidence per household member,</td>
</tr>
<tr>
<td>Various web service and connection enhancements</td>
<td>More easily integrate with OPA web service APIs</td>
</tr>
</tbody>
</table>
Interview Attachment Enhancements - Overview

Track evidence for any object in an interview

- Uploaded documents can now be saved to any object in an interview
- Supports Service Cloud custom objects
- Supports non-global entities
- Upload and manage attachments separately for each entity instance
Interview Attachment Enhancements
Attachments for non-global objects

- Upload controls can now be associated with entities:
  - When collecting entities
  - In entity containers
- Uploaded files are saved to the corresponding entity instance when an interview is submitted
  - For Service Cloud interviews:
    - Supported only for objects with AttachmentList
  - For web service connections:
    - Connector must handle attachments for any object
Uploaded documents can now be saved to Service Cloud custom objects

- Object must have attachments enabled (must have AttachmentList)
- The object must be available for output
  - Via global mapping settings, or
  - Via a mapped entity
Write Inferred Entity Rules in Excel - Overview
Simplify reference data and product selection rules

- Easily define reference data in Excel
- Use conditions to control which data instances are needed
- Even create child data instances (hierarchies)
Write Inferred Entity Rules in Excel

Inferred entities can be used as input, or as output

- Entity instances inferred with Excel are exactly the same as when inferred using rules in Word documents
- They can be used:
  - As data to drive other decisions
  - As information that will be shown directly to users
  - As results that will be passed back to a connected application
Write Inferred Entity Rules in Excel

Entities can now be conclusions in an Excel rule table

- To identify the entity in the column heading:
  - a. Use the relationship name, or
  - b. The entity’s identifying attribute
- Inferred entity instance conclusions can also be nested to create a hierarchy

<table>
<thead>
<tr>
<th>Include Non-English Speaking</th>
<th>the country</th>
<th>the country has skiing</th>
<th>the country has surfing</th>
<th>the country code</th>
<th>the tourist attraction</th>
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<td>TRUE</td>
<td>AU</td>
<td>Ayer’s Rock, Great Barrier Reef, Kakadu National Park, Sydney Opera House</td>
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Use conditions to control when instances should exist

- Use condition columns to determine when entity instances should be created
- Each inferred entity instance is treated as a separate rule
  - This means, for example, that unlike other conclusions, the same set of conditions can be used to infer the existence of more than one entity instance

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</table>
Write Inferred Entity Rules in Excel

Easily set all attributes of the inferred entity in one rule

- Set the other attributes of each entity instance along with the identity attribute
  - Attribute columns must appear to the right of the inferred entity column
- Vary attribute values for each instance depending on conditions
- Merge cells as for any other Excel rules
Auto Complete for Substitutions
Save time when authoring interviews

- Typing % triggers suggestions for which attribute to refer to
- Searches by attribute text and name
- Works everywhere substitution is supported, including:
  - Labels, captions, screen titles
  - List display values
  - Customized attribute and question text
  - Alt text on images
  - Redirect URLs
Language Support Enhancements - Overview

• New language parsers
  – Finnish
  – Turkish

• Override attribute text
  – Handle cases where an automatically generated sentence isn’t perfect

• Custom language support
  – Support writing rules in any language
Language Support Enhancements

Override Attribute Text

- In some languages, automatically generated sentence forms do not take into account all grammar rules.
- In this case it can be helpful to override attribute text.
- Related sentence forms are automatically updated as needed.
- For true/false attributes, the form used in rules can also be corrected if needed.
Language Support Enhancements

Custom Language Selection

- In addition to the built-in language parsers, a Custom option is now available.

- This option allows rules to be written in any chosen language.
Language Support Enhancements
Custom Language Configuration – Attributes

- Custom language parsers do not use recognized verbs to generate the different sentence forms.
- Instead, templates must be provided for the different sentence forms.
- The rule negation form is recognized automatically when used in a rule.
- The other attribute forms are used only in interviews and explanations.
The terms used when writing rules in Policy Modeling, Word and Excel can be changed.

Each term should be translated to the required language before writing any rules.

Data type names can also be changed.
The complete list of functions is also provided for translation.

Usually these will be translated only as they are needed by rule authors.
Language Support Enhancements
Custom Language Configuration – Values and Testing

- The names of constant values that appear in rule and testing documents should also be translated.
- Test case document headings and keywords are also translatable.
• The default names of objects created during the authoring experience can also be translated.
Web Service and Connection Enhancements – Overview

• Customize the SOAP action name for web service connections

• More easily understand type information for mapped fields

• Retrieve version information for deployed policy models
Web Service and Connection Enhancements
Custom SOAP Action Names

When Do I Need It?
When an OPA web service connection is being hosted in a framework that requires a particular soap action name structure (e.g. Siebel)

What is It?
• Provide a SOAP action name template for any web service connection
  – Include {0} where the action name should appear
  – This template is used for all four actions: GetMetadata, CheckAlive, Load and Save
• Set on the connection page in OPA Hub
• Only available for version 12.2 and later of the OPA web service connector WSDL
• Can now download the instantiated WSDL directly from the connection page
Web Service and Connection Enhancements
Field Type Information

When Do I Need It?
• When developing with OPA web services for policy models that have been mapped onto an OPA web service connection

What is It?
• Field type information is now returned on all web service actions that use data tables
• Having type information simplifies forming requests for Determinations API method calls
• Methods affected include:
  – GetInputDataDefinition
  – Investigate
  – GetMetadata
  – Load
  – Save

```xml
<typ:table name="Camera">
  <typ:field name="price" field-type="currency"/>
  <typ:field name="color_code" field-type="text"/>
  <typ:field name="has_redeye" field-type="boolean"/>
  <typ:field name="has_portrait" field-type="boolean"/>
  <typ:field name="has_timer" field-type="boolean"/>
  <typ:field name="has_flash" field-type="boolean"/>
  <typ:field name="camera_model" field-type="text"/>
</typ:table>
<typ:table name="Phone Types">
  <typ:field name="type_desc" field-type="text"/>
</typ:table>
<typ:table name="Catalog">
  <typ:link name="Camera" target="Camera"/>
  <typ:link name="chosen cameras" target="Camera"/>
  <typ:link name="loaded Phone Types" target="Phone Type"/>
</typ:table>
```
Web Service and Connection Enhancements
Policy Model Version Information

When Do I Need It?

• When you need to know if a policy has been updated. For example, so results can be recalculated when a new version is deployed

What is It?

• Policy model version information returned in Determinations API web service API calls

• Includes:
  – The deployment sequence number
  – A globally unique identifier
  – A timestamp

• Methods affected:
  – Server Service: ListRulebases
  – Assess Service: Assess, ListGoals
  – Answer Service: GetInputDataDefinition, GetAnswer
  – Interview Service: GetInputDataDefinition, StartInterview, RestoreSession
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Where to get more information

Background


Documentation


Forums

- RightNow: [http://communities.rightnow.com/groups/eedd6685ae/summary](http://communities.rightnow.com/groups/eedd6685ae/summary)
Social Media Resources

http://www.youtube.com/user/OraclePAVideos

https://www.facebook.com/OraclePolicyAutomation

https://twitter.com/OracleOPA

http://www.linkedin.com/groups/Oracle-Policy-Automation-3431282/about

https://blogs.oracle.com/OPA/

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