Safe Harbor Statement

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Program Agenda

1. Overview of Oracle Policy Automation
2. New features in August 2014 release
3. For more information
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The Oracle CX Portfolio

ORACLE MARKETING CLOUD

ORACLE COMMERCE CLOUD

ORACLE SERVICE CLOUD

ORACLE SALES CLOUD

ORACLE SOCIAL CLOUD

Web Customer Service

Cross Channel Contact Center

Knowledge Management

Policy Automation

Service Cloud Platform
Web Customer Service

Cross Channel Contact Center

Knowledge Management

Policy Automation

- Dynamic Interviews
- Rule Modeling
- Compliance Management
- Policy Lifecycle
- Integration Services
- Policy Analytics

Service Cloud Platform
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

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Simplify Policy Management
Policy Lifecycle

- **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 changed 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 2014 release

Rule Authoring
- Collaborative policy modeling and versioning *
- New hub user interface
- Value lists

Integration
- Web service connector *
- Custom properties
- Web service authorization
- Use OPA control in Chat workspace

Interviews
- Save evidence and audit documents *
  - Upload and save attachments
  - Save generated forms
- More interview layout options and controls *
  - Dynamic visibility
  - Side-by-side layout
  - Image controls
  - Collect relationships between entity instances
- Time zone enhancements

* Key new features with deep dive sections
Rule Authoring
New Features - Overview
Easily Share the Work of Developing Policy Models

AUG 2014: Collaborative Policy Modeling and Versioning

**CAPABILITY HIGHLIGHTS**
- **Many users** can work on the same project at the same time
- **Automatic fine-grained locking** prevents conflicting changes from being made
- **Easily revert any change** before upload
- **Hub repository** allows easy management and retrieval of any previous project revisions

**KEY BENEFITS**
- **Improve productivity** of policy authoring for any project with more than one person
- **Avoid conflicts** by immediately being aware of areas that others are working on
Simplified Deployment Experience

AUG 2014: New Hub User Interface

CAPABILITY HIGHLIGHTS

- **New user interface** for managing all administration
- **Separate histories** for project repository revisions and deployment snapshots
- **Centrally manage and review** data service connectivity, including detailed error logs
- **Dynamic news panel** to keep customers up to date on all latest developments

KEY BENEFITS

- **Enhanced visibility** of all deployed policy models
- **More easily track and promote** policy models from development to production
Simplify Maintenance of Choice-based Guidance

AUG 2014: Value Lists

CAPABILITY HIGHLIGHTS

- Define lists of values, each with a specific name
- Interviews automatically use a list when appropriate
- Full translation support allows for the same values to be represented in any language

KEY BENEFITS

- Update and maintain values through a single interface, speeding up policy model and interview maintenance
- See at a glance which RightNow value lists in use
- Consistency across the policy automation project and customer experience
Rule Authoring
Collaborative Policy Modeling and Versioning – Deep Dive
Project Repository
Collaborative Policy Modeling and Versioning

- Share projects by adding them to the hub repository
- Open projects directly from the repository
Work Concurrently
Collaborative Policy Modeling and Versioning

- Many changes won’t conflict unless another user changes the exact same property
- Screens, entities, attributes, mappings, styles and most project properties can generally be safely modified by any user at any time
- Changes made by you are indicated in Policy Modeling
Avoid Rule Document Conflicts
Collaborative Policy Modeling and Versioning

- Rule documents can be modified by one person at a time
- Notifications are shown when another user is making changes, so conflicts are easily avoided
- When connected to the hub, notification occurs as soon as a document is changed (i.e. before the changes are uploaded)
Choose to Undo any Local Change

Collaborative Policy Modeling and Versioning

• If needed, choose local changes to undo, to match the version last downloaded from the hub
Upload Changes to Share With the Team

Collaborative Policy Modeling and Versioning

- Before upload, an automatic conflict check takes places
- Resolve any conflicts by reverting specific changes, or by first downloading all changes from the server to merge them
- In most cases there will be no conflicts: upload to update the project in the repository
Collaborative Policy Modeling and Versioning

Download from Hub to Merge with Local Changes

- Easily merge in latest changes from hub without losing local changes you have made
Take Ownership if Needed
Collaborative Policy Modeling and Versioning

- The first person to start modifying a rule document gets an automatic “lock”
- If the person modifying a document is absent, another user can choose to “steal” the automatic lock
Review Project History
Collaborative Policy Modeling and Versioning

- Review history of changes online in hub Repository
- Also see versions in Policy Modeling project tab
Embed Advice Experiences in Any Application

AUG 2014: Web Service Connector

CAPABILITY HIGHLIGHTS

- **Add connections** via the Hub to load and save interview data from any conformant web service
- **Dynamically define the tables and fields** that are available to policy modelers for each connection
- **Pass through parameters** for data to load and to identify the authenticated user, for example

KEY BENEFITS

- **Securely integrate interviews into any application** allowing dynamic personalized guidance to be used as part of any customer, employee or agent experience
Empower Interview Designers with Flexible Controls

AUG 2014: Custom Properties

**CAPABILITY HIGHLIGHTS**
- Set property values for any interview control when designing interview screens
- Use these property values in any custom control renderer to set behavior and appearance at runtime

**KEY BENEFITS**
- Developers can provide interview authors with the flexibility to configure the behavior and appearance of a custom control, using pre-defined properties built into the control’s implementation
- Reduce maintenance costs by supporting flexible behavior from a single custom control
Securely Share Decision Making Logic with Business Partners

AUG 2014: Web Service Authorization

CAPABILITY HIGHLIGHTS

- **Restrict web service API access** to only authorized users
- **Provide separate accounts** to each partner, so access can be selectively granted or revoked as needed

KEY BENEFITS

- **Securely centralize decision-making logic** for use across any number of internal applications
- **Provide shared decision-making services** only to authorized external partners
Deliver Policy-driven Guidance On Chat Channel

AUG 2014: Use Policy Automation in a Chat Workspace

CAPABILITY HIGHLIGHTS
- Add policy automation interview controls to any chat workspace and use to guide chat interaction
- Load contact information into interview at start of chat
- Interview can create or update incidents and other information

KEY BENEFITS
- Give consistent guidance across all customer interactions by leveraging OPA advice in chat, as well as self-service and call center
Integration
Web Service Connector – Deep Dive
How a Web Service Connector Works

Web Service Connector

Thanks

Thank you. The customer’s choice (BenchmarkPro) has been submitted.
The request for the product has been recorded as Request ID 7, and will be processed shortly.

If you have any additional comments to add to the record, please enter them here:

Nice service. Found what I wanted.

Load / Save

Your Web Service Connector

Load / Save

Your Application

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Create a Web Service Connector for your Application

Web Service Connector

- Implement a SOAP web service that implements the required actions
- Deploy the web service to a location accessible to OPA Hub
- Create a connection in OPA Hub for this web service
- Use this connection for modeling and deploying interviews

Set the Connection for the Policy Modeling Project

Web Service Connector

- Choose a connection that has been configured in OPA hub
- Configure the overall start and end behavior for the interview

Map the Policy Model onto the Connection’s Data Model

Web Service Connector

- Create any entities needed to contain loaded data
- Create any entities needed to hold data before it is saved
- Map each entity onto the connection’s data model via the appropriate relationships

Configure Data to Load at Start of Interview

Web Service Connector

- For each field to be loaded, map the policy model attribute onto the corresponding field from the data connection

- Each of these mappings uses the metadata returned by the GetMetadata web service action
Configure Behavior at End of Interview

Web Service Connector

- Choose data to be sent to the web service connector Save action at the end of the interview
- Choose any data the web service should return once the Save action is completed
Deploy the Integrated Experience
Web Service Connector

- At the start of the interview the web service Load action is called to request mapped-in data.
- At the end of the interview the web service Save action is called to store mapped-out data and determined results.
- Data returned from the save action can be shown on screens after Submit.
See the Status of All Connections
Web Service Connector

- Connections page in Policy Automation Hub shows the status of all configured connections at a glance.
Get Started with Example Project and Web Service

Web Service Connector

- Java code for an example web service is provided
- Shows how to implement each action, attachments, and security for example
- An example Policy Modeling project is also provided that works with the example web service
Interviews

New Features
AUG 2014: Save Evidence and Audit Documents

**CAPABILITY HIGHLIGHTS**

- **Native upload control** for uploading documents during Oracle Policy Automation interviews
- **Save generated forms**: Save to RightNow any pre-populated forms generated during an interview
- **Include decision reports**: Detailed reasons for decisions can be saved in each document

**KEY BENEFITS**

- **Provide fast response to auditors** by showing evidence collected, and proving adherence to the legislation and policy for each and every customer case
- **Easily explain to customers** exactly why every historical decision has been made, with reference to their particular circumstances
Deliver a Tailored Advice Experience without Code

AUG 2014: More Interview Layout Options and Controls

**CAPABILITY HIGHLIGHTS**

- **Dynamic visibility** allow inputs to show or hide based on information provided on the same screen
- **Side-by-side controls** allow for a compact, form-like interview experience
- **New image control** shows in both design and runtime experiences from local file or image URL
- **Relationship collect** allows for more detailed data collection

**KEY BENEFITS**

- **Easily create** intuitive, customer-centric interviews
- **Improved experience** for self-service customers
Enable Global Customer Service

AUG 2014: Time Zone Enhancements

CAPABILITY HIGHLIGHTS

- **Choose the time zone to use** for point in time rule calculations, per policy model
- **Choose how time zones** will be shown in interviews
- **Easily** specify standard or long time zone formats

KEY BENEFITS

- **Ensure consistent understanding of** the time of any event in the customer service experience regardless of the geography of agent and customer
- **Seamless handling of years and key dates** when time-zone-specific changes occur
- **Provide detailed, auditable explanations** for every time-based decision
Add Upload Controls to Interviews

Save Evidence and Audit Documents

• Add upload controls to any page in the interview
• Uploaded documents are submitted with the interview data when it is saved
Choose Forms to be Saved with Interview

Save Evidence and Audit Documents

- Choose which forms should be generated and saved when the interview is submitted
Store Attachment in the Connected Application

Save Evidence and Audit Documents

- For RightNow: the attachment is stored on the object mapped out from Global (e.g. Contact)
- For Web service connections: the web service can choose what to do with the attachment content
Interviews

More Interview Layout Options and Controls – Deep Dive
Dynamic Visibility
More Interview Layout Options and Controls

- Dynamically show or hide controls on a screen
- Works with any boolean attribute collected on the same screen
- Compliant with accessibility standards
Side-by-side Controls
More Interview Layout Options and Controls

- Use containers to create areas where controls will be laid out side-by-side
- Responsive design at runtime: controls reposition vertically on narrow screens
Image Control

More Interview Layout Options and Controls

- Choose an image file to include on a screen, or
- Use the URL of existing image
- Includes text description for accessibility
- Images can also link to other locations
Relationship Collect
More Interview Layout Options and Controls

- Can now collect relationship membership of reference (non-containment) relationships
- Collected choices can then be used to make further decisions
- **Note:** Mapping of reference relationships is not supported, so they cannot yet be saved
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August 2014 Short Videos on YouTube

Check out the Oracle Policy Automation channel: https://www.youtube.com/OraclePAVideos

Watch these August 2014 videos full screen for HD resolution:
• Chat workspace integration: https://youtu.be/f-HmUh-UrjA
• Save evidence and audit documents: https://youtu.be/_ctPSLVcsfs
• Collaborative policy modeling: https://youtu.be/fdVQsi8Y20I
• Interview layout enhancements: https://youtu.be/p5r6HUOdYbY
• Web service connectors: https://youtu.be/S6EQf7WqTtA
August 2014 User Guide

- Topics covering all new areas
- Updated information about security, example projects, troubleshooting and more


Where to get more information

Background


Documentation

- RightNow User Guide and more: https://cx.rightnow.com/app/answers/detail/a_id/5168

Forums

- RightNow: http://communities.rightnow.com/groups/eedd6685ae/summary
Social Media – Stay in Touch

https://twitter.com/OracleOPA

https://www.facebook.com/OraclePolicyAutomation

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

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

https://blogs.oracle.com/OPA/
Hardware and Software
Engineered to Work Together