Oracle Policy Automation
The modern enterprise advice platform

Features and benefits
August 2017
Program agenda

1. Overview of Oracle Policy Automation
2. New features in August 2017 release
3. For more information
Program agenda

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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.
Modern service delivery requires many types of policies

- Service and Advice Rules
- Organizational Best Practices
- Regulations
- Legislation
- Government Policies
- Product Decisions and Eligibility Rules
Customers expect simple, accurate and personalized advice
Smarter Advice

Personalized
Seamless
Immediate
Personalized experiences that directly answer the customer’s question
With Policy Automation you can Tailor customer experiences with contextualized, personalized immediate advice.
Seamless advice across every channel across your organization
With Policy Automation you can

Deploy the same advice through any channel

Seamlessly connect to existing applications
Immediate responses to customer enquiries, changing business requirements and regulators
With Policy Automation you can

**Empower** business users to write rules

**Instantly** explain every decision

Main Eligibility Rule

*The customer is eligible for a loan if*
- The customer meets the minimum eligibility requirements and
- The customer meets the loan serviceability tests and
- The customer is able to offer sufficient security for the loan and
- The customer has supplied sufficient supporting documentation

Minimum Eligibility Requirements

*The customer meets the minimum eligibility requirements if*

- The customer’s age \( \geq \) the minimum age for loan approval
- Either:
  - The residency tests are waived or
  - The customer is a resident
- And
  - The customer has requested a loan within bank thresholds
    - The loan amount \( \geq \) the bank’s minimum loan amount and
    - The loan amount \( \leq \) the bank’s maximum loan amount
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
Program Agenda

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Highlights of Policy Automation August 2017 release

✓ Checkpoints for Service Cloud agents
  Provide seamless guidance even when customers switch channels

✓ Mobile assessments for Service Cloud
  Conduct consistent and auditable field service activities

✓ REST API for Hub deployments
  Automate policy model lifecycle tasks
Provide seamless guidance across channels

AUG 2017: Checkpoints for Service Cloud agents

**CAPABILITY HIGHLIGHTS**

- **Agents can save and resume interviews** within Service Cloud
- **Agents can resume and update interviews** started by Contacts on the self-service channel, and vice versa

**KEY BENEFITS**

- **Provide a seamless omni-channel experience** when customers call an agent for help completing an application or getting advice
- **Reduce training costs for agents** by adopting OPA interviews for use cases where the ability to save and resume partially completed assessments is required
Fast, accurate and auditable field activities

AUG 2017: Mobile assessments for Service Cloud

**CAPABILITY HIGHLIGHTS**

- Each agent downloads assessment information from Service Cloud to OPA mobile app
- While offline, agents complete the check-lists, then upload to Service Cloud when connected
- Can also embed these capabilities within other apps using MAF-based SDK, if needed

**KEY BENEFITS**

- Provide an easy to administer offline guidance solution for mobile field agents
- Prove compliance with repair standards and inspection protocols
- Create flexible multi-platform mobile solutions tailored to specific business requirements
Automate policy model lifecycle tasks

AUG 2017: REST API for Hub Deployments

**CAPABILITY HIGHLIGHTS**

- Deploy, explore, activate, retrieve and update policy models on an OPA Hub using a REST API

**KEY BENEFITS**

- Build custom web interfaces and automation scripts for policy lifecycle tasks such as promotion from test to production
- Build value-add services that inspect the contents of deployed policies – such as ensuring compliance with certain corporate standards
Feature Deep Dive

Agent checkpoints
Checkpoints for Service Cloud agents – Overview

Provide seamless guidance even when customers switch channels

- As an agent, resume interviews started by any contact or agent
- Allows agents to assist callers that want help with interview questions
  - Contacts and agents must be logged in when interview is displayed
  - Contact can continue at a later time, even if agent completes a screen for them
- Easy to configure
  1. One-time import to Service Cloud
  2. Set checkpoint options in OPA project

Aug 2017
Checkpoints for Service Cloud agents – Resuming

Choose your own checkpoint text

- Agent interviews prompt if a relevant checkpoint exists
- Checkpoint prompts are configured in Policy Modeling styles dialog
  - Filter by ‘checkpoint’ to quickly find strings to update
- Checkpoint text for contacts is still configured via the OPA widget
Checkpoints for Service Cloud agents – Agent-only

Configure agent-only checkpoints in Policy Modeling

To configure checkpoints for agent-only interviews, in Policy Modeling:

1. Choose a Service Cloud connection for the project (Service Cloud instance must be configured for checkpoints)
2. Select which object to load at the start of the interview
3. On Interview tab, choose the screens after which checkpoints will be created
Checkpoints for Service Cloud agents – Multi-channel

Configure shared checkpoints in Policy Modeling

- Configure checkpoint behavior in Policy Modeling
  1. Choose a Service Cloud connection for the project
  2. On Interview tab, choose screens after which checkpoints will be created
  3. For customer portal interviews, also check ‘Agents can save and resume Contact checkpoints’
Checkpoints for Service Cloud Agents – Setup

One time configuration to add support to a Service Cloud instance

- Import provided package to create the necessary custom objects
  - Two custom objects will be created in “OPA” namespace
    - Checkpoints for all contacts will be saved in ContactCheckpoint
    - Checkpoints not associated with a contact are saved to AgentCheckpoint
  - Recommended to periodically review and remove stale checkpoints
Feature Deep Dive

Mobile assessments for Service Cloud
Mobile assessments for Service Cloud – Overview

Consistent guidance for field workers, with automatic synchronization

- Manage agent assessments using Service Cloud
  - Design assessments as interviews
  - Use extensible workflow model to assign assessments to agents
  - Assessments sync with OPA mobile
  - Agents complete assessments on mobile device, even while offline
  - Results are automatically uploaded

- Create custom cross-platform applications with OPA Mobile SDK
Mobile assessments for Service Cloud – Design

Design assessments as OPA interviews with Service Cloud mapping

- Design Service Cloud agent interviews for mobile users
  - Requires Service Cloud connection
  - Map in data from Service Cloud to be used during the assessment
  - Map out results to the same or different Service Cloud objects

- Requires OPA Agent or OPA Mobile cloud SKU in subscription
  - Remember to choose “Mobile” as channel on deployed policy model
Assignments are assigned in Service Cloud

Assign assessments to agents with the provided custom object
- Create Open MobileAssessments, and associate them with an agent
- Agent name in Service Cloud must match OPA Hub username
- The user must have the Mobile role for the OPA deployment’s collection

Map in data for the assessment
- Enter an object id of the type chosen in OPA Mapping Settings (if any)

Must be the ID of an object that matches the Mapping Settings for the OPA project
Mobile assessments for Service Cloud – Retrieval

Automatic check for new assessments, with notifications

- On first login, all assigned assessments are downloaded
- Thereafter, checks are automatic
  - Occur in the background on regular basis when connection available
  - If new items available, and re-login is needed, notification is shown
  - Otherwise they are simply downloaded automatically
- Assessments requiring action always appear in Current list

Notification appears when new assessments are available
Mobile assessments for Service Cloud – Assessing

Start, continue and complete assessments even while mobile is offline

- Start, pause and resume
  - Single tap to launch any assessment
  - Can have multiple in progress

- Queue for upload
  - When interview is Submitted, agent is prompted to mark for upload
  - If declined, can later swipe left on assessment to add to upload queue
  - Will upload when device connects

- Queued and completed items
  - Move to the Done list

Upload is automatic
Mobile assessments for Service Cloud – Workflow

Track progress of assigned assessments via status in Service Cloud

Assessment Status

- **Open**: Create assessment and assign to agent
- **In Progress**: Assessment downloaded by agent onto mobile device
- **Complete**: Completed assessment uploaded from mobile device
- **Cancelled**: Flag assessment for removal from mobile device

- ✓ Create assessments with the *Open* status
- ✓ OPA Mobile updates the status
  - On download to agent, assessments are marked as *In Progress*
  - On upload, submitted assessments are marked as *Complete*
- ✓ Can override *In Progress* status
  - *Cancelled* removes from agent list
  - *Re-Open* forces agent to refresh an assessment, in case data changed
Mobile assessments for Service Cloud – Ad hoc assessments

Respond dynamically in the field to situations that arise

✓ Provide troubleshooting and other ad hoc advisors
  - No data mapping or connection
  - Simply deploy on mobile channel

✓ Agents manage assessment cycle
  - Start new session as needed
  - Remove when advice is complete
  - No workflow in Service Cloud
  - No results are saved
Mobile assessments for Service Cloud – Initial configuration

Set up required objects in Service Cloud to get started

- Object definitions are provided
  - Import into Service Cloud object designer to enable the mobile OPA assessments feature

- Configure workflow as required
  - Define Service Cloud workflows, scripts etc. to create assessments and assigned to particular agents
Mobile assessments for Service Cloud – Custom apps

Build custom applications that use OPA mobile app functionality

- Build cross-platform apps that use OPA mobile features
  - Use provided OPA mobile app code as starting point, or build from scratch
  - Override and extend default appearance and behaviour as needed
  - Simple examples and full documentation provided
  - OPA Mobile SDK built on Oracle Mobile Application Framework (MAF)
Other Enhancements
## Other enhancements

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New Hub dashboard and user interface styles
Experience a clean look and feel when administering OPA projects online

- See overall status at a glance
  - The new dashboard page provides an overview of hub status

- Streamlined navigation bar
  - See more page content
  - Access message logs and other items from the user menu

- Alta-like look and feel
  - Responsive login screen
  - Experience a style that is consistent with other Oracle cloud applications
Change Hub UI language while logged in

Change Hub UI language, even when external authentication enabled

- Set UI language from user menu
  - Change Hub UI language at any time after log in
  - Allows externally authenticated users* to change language

*External authentication currently only supported for OPA private cloud
Time per screen statistic
Maximize the efficiency of advice experiences

- Identify screens that could benefit from optimization
  - View charts of how long users spend on average on each interview screen
  - Filter by customers or agents
  - Export data for offline analysis, management reports and KPIs

- Track improvements between deployment versions
Use custom root certificates for web service connections

Simplify the development lifecycle when using custom connectors

- Use web service connections that present custom SSL certificates
  - Add root certificates via OPA Hub
  - Choose which connections allow these custom signing authorities
  - By default, connections trust only the built-in root certificates
  - Review and update custom root certificates based on expiration date

- Use self-signed certificates for development servers, for example
List unused attributes in a project
Clean up projects that have evolved over time

Find attributes that are not used in a Policy Modeling project

- Filter option *Unused* shows all input attributes that are not collected on a screen, used in a rule, or treated as an interview goal
- This can help find mismatches in attribute wording, for example, or simply attributes that are no longer needed and can be removed
Execute project test cases from the command line
Incorporate policy model testing into continuous delivery pipelines

- Automate execution of Policy Modeling project test cases
  - OPMRunTests.exe Windows tool builds project and runs all test cases
  - Choose between XML, JUnit and HTML output files, or specify custom XSL transformation
- Integrate with continuous delivery
  - Include policy model test case results and execution timing in automated development streams
Warranty example project

Easily demonstrate OPA for warranty, with service requests

- Guide user to the most appropriate outcomes
  - Troubleshoot for self-service resolution
  - Create record only where follow-up is required
- Mandatory reporting of issues
  - Determine where issue must be reported
  - Auto-generate forms and audit reports
- Flexible demo options
  - Ideal for agent or self-service use
  - Designed for Service Cloud and Engagement Cloud
Interview accessibility conformance checks

Help interview authors create fully accessible interview experiences

- Choose desired WCAG conformance level
- Be warned when known items do not meet standard
  - Contrast ratio of text and background colors
  - Missing alt text on images
  - RTF form templates
- General warning on deploy for items that can’t be checked by OPM
  - Inline HTML tags used on screens
  - Interview extensions
  - PDF form templates
Product documentation in more languages

Business user friendly topics for non-English speakers

✔ Most guides now available in 5 languages
  • French
  • Italian
  • Portuguese (Brazil)
  • Simplified Chinese
  • Spanish

✔ Two guides are in English only
  • Developer Guide
  • System Administrator Guide

✔ All images remain in English
Remove interview checkpoints on submit to Service Cloud
Allow revisiting of advice experiences, even for new cases

- Remove checkpoint from Service Cloud when interview submitted
  - Works for both agents and contacts
  - Incomplete advice resumes as normal
  - Completed interviews start fresh if they are launched again

- Ideal for interviews that are used repeatedly at different times
  - E.g. device troubleshooter, blood donation checker, refunds or returns
Control when interviews show error event messages

Simplify management of automatic validation rules

- Configure interview error display behavior on a per-screen basis
- Continue to validate errors immediately as needed
  - Existing screens check error rules whenever a control value changes
- Validate multiple interacting controls
  - Default “On navigate” option checks for errors only when leaving the screen

Even though total is not 100%, error shown only when user tries to leave screen

Income Expenditure

% spent on food? 37
% spent on housing? 39
% spent on other? 32

Total: 108%

Even though total is not 100%, error shown only when user tries to leave screen
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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