Program Agenda

1. Overview of Oracle Policy Automation
2. New features in February 2015 release
3. For more information
Program Agenda

1 Overview of Oracle Policy Automation
2 New features in February 2015 release
3 For more information
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
Service Cloud Platform

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

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Personalize Your Customer Interactions

Dynamic Interviews

- 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

High level eligibility

the student satisfies the basic eligibility requirements for student aid if
the student satisfies the financial need requirement and
the student satisfies the citizenship/immigration status criteria and
the student satisfies the Social Security Number criteria and
the student satisfies the annual family income requirements.

the student satisfies the financial need requirement if
the student's annual family income is
the income threshold for the family size
22340
30260
38180
46100
54020
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
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 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
Program Agenda

1. Overview of Oracle Policy Automation
2. New features in February 2015 release
3. For more information
Highlights of Policy Automation February 2015 Release

- New mobile advice application
- Interview experience enhancements
- New web services for integration
- New private cloud edition
Mobile advice application – New!
Deliver up to date advice on Apple and Android devices, even when not connected to a mobile or Wi-Fi network

Mobile app

- Download from Google and Apple stores
- Policies auto-sync from your OPA hub
  - Choose policies to push to mobile
  - Provide mobile users with login
  - Devices check for and download updates whenever connected
Interview experience enhancements
Improved productivity and look and feel for users of online guidance

Interview enhancements
- Change button style and position
- Combine screens that collect different data
- Automatically redirect to a URL when an interview completes
- Show and hide controls on same screen when a drop-down selection changes
New web services for integration
Deliver custom interview experiences and automate decisions for connected applications

Web services

- Interview service for delivering fully custom advice experiences
  - Build your own interview user interface
  - Service maintains all concurrent sessions
  - Generate forms and auditing documents

- Answer service for automating application decisions
  - Make consistent decisions in your app
  - Use your connector’s data model
Private cloud edition – New!

Now both private cloud and Oracle Cloud customers can take advantage of Oracle’s modern enterprise policy automation solution

### Oracle Cloud
- High productivity rule authoring
- Ease of application integration
- Centralized policy management
- Mobile application support
- Bring in OPA projects from 10.x
- Managed by Oracle Cloud operations
- Pre-integrated with Oracle CX Cloud

### Private cloud
- High productivity rule authoring
- Ease of application integration
- Centralized policy management
- Mobile application support
- Bring in OPA projects from 10.x
- Managed in your environment
## All the new features in OPA February 2015 release

### Rule modeling
- New rule browser
- Automatic final screens
- Dynamic # default entity instances
- Russian and Korean parsers
- Override attribute text
- Import value lists
- Legends in testing documents
- New text functions
- Migrate 10.x projects

### Dynamic interviews
- New cross-platform mobile OPA advice app
- Dynamic behavior on list selection
- Custom button position and styles
- End-of-interview redirects
- Combine screens that collect information about different objects
- Enhanced relationship collection
- PDF/A archive-ready forms

### Integration services
- Automatic audit reports
- Interview web service
- Answer web service
- Reference relationship support
- Import/export hub policy models
- Web service connection authentication enhancements
- Localizable metadata for web service connections
- New private cloud edition
Deep Dive – February 2015 Release

- New mobile advice application
- Interview experience enhancements
- New web services for integration
- New private cloud edition
Mobile advice – OPA App for iPad, iPhone and Android

• The OPA mobile application is available for both Apple and Android devices
• Simply search for *Oracle Policy Automation* in Google Play or Apple App Store
Mobile advice – Mobile user management

- Mobile app users are managed in Policy Automation Hub
- To download policy models to a mobile device, a user must have the Mobile User role
Mobile advice – Activate policy models for mobile use

- Policy models deployed to the *Mobile* channel are available to mobile users
- Mobile activation and deactivation can be performed without affecting other channels
Mobile advice – Synchronize policy models from OPA Hub

• Configure the Hub URL and mobile username/password in the OPA mobile app
• Policy models automatically download whenever a network connection is available
• A manual download can also be triggered if needed

![Settings](http://example.com)

<table>
<thead>
<tr>
<th>OPA HUB</th>
</tr>
</thead>
<tbody>
<tr>
<td>URL</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Username</td>
</tr>
<tr>
<td>jane_jones</td>
</tr>
</tbody>
</table>

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Mobile advice – Get advice!

- The most recent policy model advice session reappears whenever the app is started.
- Interact with the advice application to perform troubleshooting, provide or obtain advice or perform any other interactive assessments.
- Choose another policy model at any time from the Library page.
- Note that mobile interviews do not use the styling specified for the web interview.
Mobile advice – Save and resume sessions

• Progress is automatically saved for each policy model, and can be resumed at any time
• Any number of sessions can also be saved to continue later, or for further review
Deep Dive – February 2015 Release

New mobile advice application

Interview experience enhancements

New web services for integration

New private cloud edition

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Interviews – Dynamic behavior on list selection

- When list selection changes: change visible, read-only or optional state of other controls
- Supports conditions that use a set of values (is one of), including negation (is not one of)

**When authoring**

<table>
<thead>
<tr>
<th>Where do you live?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collects attribute the household's location</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>In what part of Alaska do you live?</th>
</tr>
</thead>
<tbody>
<tr>
<td>○ Central</td>
</tr>
<tr>
<td>○ Northern</td>
</tr>
<tr>
<td>○ Northwest</td>
</tr>
<tr>
<td>○ Southcentral</td>
</tr>
<tr>
<td>○ Southeast</td>
</tr>
<tr>
<td>○ Southwest</td>
</tr>
</tbody>
</table>

**Interview user experience**

**Welcome to myBenefits**

myBenefits is a quick and easy way to get answers to questions about your State’s programs and citizen services.

<table>
<thead>
<tr>
<th>Where do you live?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alaska</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>In what part of Alaska do you live?</th>
</tr>
</thead>
<tbody>
<tr>
<td>○ Central</td>
</tr>
<tr>
<td>○ Northern</td>
</tr>
<tr>
<td>○ Northwest</td>
</tr>
<tr>
<td>○ Southcentral</td>
</tr>
<tr>
<td>○ Southeast</td>
</tr>
<tr>
<td>○ Southwest</td>
</tr>
</tbody>
</table>

- Show if: the household’s location is Alaska
- Read-only if: Never
- Optional if: Never

**Where do you live?**

<table>
<thead>
<tr>
<th>New York</th>
</tr>
</thead>
<tbody>
<tr>
<td>○ New York City</td>
</tr>
<tr>
<td>○ Long Island</td>
</tr>
<tr>
<td>○ Rest of NY State</td>
</tr>
</tbody>
</table>
Interviews – End of interview redirects

• Choose to redirect to another URL when leaving any interview screen
• For example, show a details page for an incident created on submit
• Parameterization of the URL is supported (e.g. %attribute name%)
• Works both with submit, and regular Next buttons
Interviews – Custom button position and styles

- Style of interview buttons can now be modified to suit branding/design
- For ease of navigation, Back/Next default to top-right in new interviews
- For entities, appearance of Add Instance/Remove buttons also now configurable

When authoring

Interview user experience
Interviews – Combine screens that collect different data

- Screens can now collect data that belongs to more than one entity
- This can make it easier for customers to provide related information

When authoring

Interview user experience
Interviews – Enhanced relationship collection

• When collecting reference relationships, the description for each member of the relationship can now include HTML tags and attribute substitution from the entity instances.

• This allows a customer to see a richly formatted description of each option when they are making a choice of one or more related items.

When authoring

Interview user experience

Suitable Products

We have identified 3 products that may be suitable.

If the customer would like to proceed with one or more products, please select their choices here:

<table>
<thead>
<tr>
<th>BenchmarkPro</th>
<th>Redeye</th>
<th>Flash</th>
<th>Timer</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>$95.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PicElite-400</th>
<th>Redeye</th>
<th>Flash</th>
<th>Timer</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>$140.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ProperPic-55</th>
<th>Redeye</th>
<th>Flash</th>
<th>Timer</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>$90.00</td>
</tr>
<tr>
<td>New mobile advice application</td>
<td>Interview experience enhancements</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>-------------------------------</td>
<td>----------------------------------</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New web services for integration</td>
<td>New private cloud edition</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Integration – Answer web service

Get answers from any policy model connected to a web-service

Features of the new answer service:

- Scalable SOAP web service API for determining results from data
- Designed to be used easily in combination with any configured OPA web service connection
- Provides a description of the mapped data to pass in, using the same Table XML format as the web service connector
- Also uses the Table XML format to return the set of mapped-out results
- Audit reports are also returned as specified in the policy model
Integration – Interview web service

Develop custom interview experiences for any application

Features of the new interview service:

• Scalable SOAP web service API to manage in-flight interview sessions
• Save and load interview snapshots across policy versions
• Generate forms (PDF, HTML, RTF)
• Full support for policy models that are using a web service connection:
  – Policy modelers can describe the data to pre-seed and to submit
  – Same data format used for the interview service and the web service connector framework
Deep Dive – February 2015 Release

<table>
<thead>
<tr>
<th>New mobile advice application</th>
<th>Interview experience enhancements</th>
</tr>
</thead>
<tbody>
<tr>
<td>New web services for integration</td>
<td>New private cloud edition</td>
</tr>
</tbody>
</table>
Private cloud – Major changes since OPA 10.4

• Completely updated Policy Modeling experience
• New Hub application for managing and deploying policy models
• Full clustering support for load-balancing and fail-over on WebLogic
• Connect interviews to other applications with web services
• New mobile application for cross-platform disconnected advice apps
Private cloud – Platforms supported

**Application Servers**
- ✓ Oracle Weblogic Server 11g
- ✓ Oracle Weblogic Server 12c

**Database Servers**
- ✓ Oracle Database 11g
- ✓ Oracle Database 12c
- ✓ MySQL 5.6

When will other platforms be supported?

- Oracle plans to support more Java application servers in future releases
- Note that OPA 10.4 is supported through at least 2020 on all existing platforms
1. Download the application packages from Oracle Software Delivery Cloud:
   – Oracle Policy Automation for Java 12.1
   – Oracle Policy Modeling 12.1

2. Install Oracle Policy Automation for Java:
   – Set up and configure pre-requisites (application and database servers)
   – Follow the product documentation to install OPA for Java for your application and database servers

3. Install Oracle Policy Modeling:
   – Ensure Microsoft Office 2007 or later is available on each author’s Windows machine
   – Install Oracle Policy Modeling

4. Provide Policy Automation Hub login accounts for each Policy Modeling user
Private cloud – How to choose which version to use

<table>
<thead>
<tr>
<th>Use OPA February 2015</th>
<th>Use OPA 10.4</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ New and existing self-service advice applications</td>
<td>✓ New and existing Siebel self-service and case management projects*</td>
</tr>
<tr>
<td>✓ New mobile advice apps</td>
<td>✓ Existing custom mobile apps</td>
</tr>
<tr>
<td>✓ Custom applications that use OPA 10.x web services</td>
<td>✓ Need to stay on an application server platform not supported by OPA private</td>
</tr>
<tr>
<td>✓ Any projects moving from Oracle Cloud to private cloud</td>
<td>cloud edition</td>
</tr>
<tr>
<td></td>
<td>✓ New and existing Oracle CRM on Demand projects</td>
</tr>
</tbody>
</table>

* Full support for OPA February 2015 and later is planned to be available in upcoming Siebel innovation packs
Overview of OPA Feb 2015 private cloud edition

Q. How is OPA private cloud edition licensed?

Two core products must be licensed (same as for OPA 10.4):

1. Oracle Policy Modeling
   - License for each user that authors, manages or tests rules and interviews
   - Each licensed user can use Policy Automation Hub for managing and testing rule versions

2. Oracle Policy Automation (runtime)
   - License by processor, or license by application user
   - Includes administrative use of Policy Automation Hub for managing OPA users and deployments
Private cloud - Upgrade

Q. Can I upgrade to OPA Feb 2015 private cloud edition?

<table>
<thead>
<tr>
<th>Licensed Product (from Siebel price-list)</th>
<th>Upgrade permitted to OPA Feb 2015 Release?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Policy Modeling</td>
<td>Yes. Upgrade is covered under your existing license.</td>
</tr>
<tr>
<td>Oracle Policy Automation</td>
<td></td>
</tr>
<tr>
<td>Oracle Policy Automation for Mobile Devices</td>
<td></td>
</tr>
<tr>
<td>Oracle Policy Automation Connector for Siebel</td>
<td>Yes, but functionality is being provided in Siebel*</td>
</tr>
<tr>
<td>Oracle Policy Automation Connector for Oracle CRM on Demand</td>
<td>For upgrade options for OPA with CRM on Demand, contact your sales representative.</td>
</tr>
</tbody>
</table>

Note: Before upgrading your private cloud project to OPA February 2015 release, there are many factors to consider, including what style of integration with other applications is needed. Consult the product documentation for further details.

* For Siebel projects, contact your sales representative to confirm the best OPA private cloud version to use.
Deep dive

- New private cloud edition
- New mobile advice application
- New web services for integration
- Interview experience enhancements

More new features!
More new features

**Rule modeling**
- New rule browser
- Automatic final screens
- Dynamic # default entity instances
- Override attribute text
- Import value lists
- New text functions
- Russian and Korean parsers
- Legends in testing documents
- Migrate 10.x projects

**Dynamic interviews**
- New cross-platform mobile OPA advice app
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**Integration services**
- Interview web service
- Answer web service
- Automatic audit reports
- Reference relationship support
- Import/export hub policy models
- Web service connection authentication enhancements
- Localizable metadata for web service connections
- New private cloud edition

Feb 2015
The new rule browser is designed to make it easy to check that all policies are accurate and up to date.

In Oracle Policy Modeling, quickly preview all the locations in which any rule or data item is used.

Keep rule definitions and references visible while reviewing other rules and documents.

Easily edit and debug as you find rules that need to change.
Authoring enhancements – Automatic final screens

- New projects now automatically have a final screen that explains the interview outcome
- A default explanation is added, which can be easily overridden when needed
- This makes it easier to understand and demonstrate the benefits of Policy Automation
Authoring enhancements – Dynamic number of default entity instances

- Sometimes an interview needs to ask for the details of a known number of things
  - For example, 4 children, 2 phone numbers, last 3 places of employment
- It is now possible to default the number of blank rows to a dynamic default
  - In other words, the value is provided by some other attribute in the policy model
- Instances can still be added or removed if needed (or add/remove can be disabled)
Authoring enhancements – Override attribute text

- For languages with more complex grammatical rules than English, it is sometimes not possible to add a verb or rephrase an attribute to get the correct auto-generated sentences forms.
- To address this, the auto-generated rule (for boolean) and explanation sentence forms (for all attribute types) can now each be overridden independently.

Customizing the attribute sentence forms
Authoring enhancements – New text functions

• By popular request, three new text functions are now available:
  – Upper – returns a text value with all letters converted to uppercase
  – Lower – returns a text value with all letters converted to lowercase
  – Find – returns the 0-based position of a string to look for, or uncertain if not found
Authoring enhancements – Import value lists

• Reusable value lists such as states, currencies, countries etc. can now be created in one project imported into any other projects as needed

• To import value lists from another project, simply browse to that project, then choose which value lists to import
Authoring enhancements – Russian and Korean parsers

• Russian and Korean are both now supported as rule languages
• Choose the rule language when starting a project
Authoring enhancements – Migrate 10.x projects

- Migrate version 10.4 OPA projects to the latest Oracle Policy Modeling experience, so can deploy to Oracle Policy Automation Cloud Service or OPA February 2015 private cloud edition
- Preserves your existing investments in rules, test cases, and screens while allowing Policy Modeling features such as automatic attribute detection to work seamlessly with the upgraded project
- Any changes between versions are clearly identified in the available reports
Authoring enhancements – Legends in testing documents

- Test case Excel workbooks can now be made easier to understand with legend keys
- Provide shorter attribute names for any column in the Test Cases sheet
Interviews – PDF/A archivable documents

- Forms can now be generated in PDF/A-1b format, which conforms with long-term archiving ISO standard ISO 190005-1*
- This generates forms in PDF 1.4 format, with all text in the embedded Albany font

Integration – Automatic audit reports

• Detailed audit reports can now be easily enabled; no report configuration is needed
  – Simply select the audit report option in the attribute editor
  – Unlike explanations, audit reports ignore any *silent* and *invisible* settings in the project

• When an interview with a connection is submitted
  – for Service Cloud: audit reports are provided as a single HTML attachment to the top-level object
  – for Web service connections: audit reports are in the `<AuditReportList>` passed to the Save action

---

**When authoring**

![Diagram](image)

**Service Cloud HTML attachment**

```html
- Audit report for 'Total Payable':
  - The order amount payable is $252.00.
  - The order total is $220.00.
  - The customer loyalty discount on the order is $28.00.
  - The cost of shipping on the order is $30.00.

- Audit report for 'Document_Amount_Loyalty':
  - Entity instance 'global'
  - The customer loyalty discount on the order is $28.00.
  - The order total is $220.00.

- Audit report for 'Free Shipping Eligibility':
  - Entity instance 'global'
  - The customer is eligible for free shipping.
  - The customer is a gold member.
  - The order total is over $100.
```
Integration – Reference relationship support

• Reference relationships can now be loaded and saved
  – Web service connection must expose relationships through the metadata
  – Policy modelers then map (bind) to them in the relationship editor
Integration – Import/export hub policy models (private cloud)

• A command-line utility is now available for interacting with deployments
• For private cloud customers with a firewalled production environment, it allows policy models to be deployed without needing Policy Modeling / Windows / Office inside the production firewall
• It is available in the bin directory of the Policy Automation private cloud media pack:
  – opa/bin/admin.sh (for Linux systems) and opa/bin/admin.cmd (for Windows)

```
D:\>admin.cmd download_deployment -huburl=http://<customer1/opa-hub
-hubuser=<password>-deployname=DMVDocGuide -version=3 -deployzip=.dmvdocguide.zip

D:\>java -cp "$\{lib/opa-hub.jar\}$\{lib/commons-lang-2.4.jar\}$\{lib/determinations-utilities.jar\}$\{lib/hub-util.jar\}$\{lib/log4j-1.2.17.jar\}$\{lib/mysql-connector-java-5.1.33-bin.jar\}$\{lib/ojdbc7.jar\}$\{lib/spymvcached-2.4.8.jar\}$\{lib/velocity-1.7.jar\}
D:\>java -cp "$\{lib/opa-hub.jar\}$\{lib/commons-lang-2.4.jar\}$\{lib/determinations-utilities.jar\}$\{lib/hub-util.jar\}$\{lib/log4j-1.2.17.jar\}$\{lib/mysql-connector-java-5.1.33-bin.jar\}$\{lib/ojdbc7.jar\}$\{lib/spymvcached-2.4.8.jar\}$\{lib/velocity-1.7.jar\}" com.oracle.determinations.hub.exec.HubExecAdminCmdLine
D:\>admin -hubpass=Passw0rd -deployname=DMVDocGuide -version=3 -deployzip=.dmvdocguide.zip
Command executed successfully
```
Integration – Web service connection authentication

• For ease of integration, new security options are available for web service connections:
  – WS-Security username/password on some or all web service connector SOAP requests
    • Includes an optional timestamp that expires after 5 minutes (web service connector time must be synchronized to OPA server)
  – In load and save requests, an OAUTH token in the HTTP header with a value that was passed to the URL that started the interview
Integration – Localizable metadata for web service connections

- Developers can now expose the metadata for a web service connection in multiple languages.
- This allows a single web service connector to support policy modelers working in any language.
- The web service will be asked to return descriptions that match the rule authoring language for the policy modeling project.
- If no descriptions are available in the requested language, the web service should instead return the descriptions of an appropriate default language.
Agenda

1. Business challenges
2. Solution overview
3. Feature walkthrough
4. Additional resources
Where to get more information

Background


Documentation


Forums

- RightNow: [http://communities.rightnow.com/groups/eedd685ae/summary](http://communities.rightnow.com/groups/eedd685ae/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/

Safe Harbor Statement

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Hardware and Software
Engineered to Work Together