Oracle Policy Automation
A Modern Enterprise Policy Automation Solution

Features and Benefits
February 2016
Program Agenda

1. Overview of Oracle Policy Automation
2. New features in February 2016 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.
Modern service delivery requires many types of policies

- Government Policies
- Regulations
- Service and Advice Rules
- Organizational Best Practices
- Legislation
- Product Decisions and Eligibility Rules
Customers struggle with how company policies apply to them
Policy Automation enables consistency and agility

Deploy up to date policies directly into service experiences

Align to source material

- Product and service definition rules
- Regulations
- Company policies

Manage policy models centrally

Advise customers and agents

- Self-service, mobile
- Chat
- Call center
- Any other apps
Web Customer Service

Cross Channel Contact Center

Knowledge Management

Policy Automation

Field Service Management

Service Cloud Platform
Oracle Policy Automation helps across industries

Compliance automation
Warranty management
Needs Analysis
Sales bonus incentives
Complaint logging

Education course applications
Customer needs and on-boarding
Mobile inspections and ticketing
Claim eligibility
Payment determinations

Hundreds of customers in over 20 different industries, from large enterprises to small mid-market businesses
The Oracle Policy Automation difference

- Manage policies (Word and Excel)
- No need for custom development
- Deploy across multiple channels
- Provide detailed explanations

- Share logic with other apps
- Track and audit any decision
- Understand impact with what if analysis
- Manage complete policy lifecycle
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
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
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Highlights of Policy Automation February 2016 Release

- Interview checkpoints
- Touch-friendly interviews
- Free navigation in interviews
- Multi-level value lists
Enable Successful Multi-visit Self-service
FEB 2016: Interview Checkpoints

CAPABILITY HIGHLIGHTS
- **Automatically save** customer progress as they interact with self-service advice experiences that are connected to another application
- **Automatically resume** from those checkpoints when they revisit the same interviews
- **Flexible integration options** support desktop and mobile experiences, or any combination

KEY BENEFITS
- **Customers can easily resume where they left off** if they are interrupted or need more time to gather additional data or evidence
- **Continue assessments on-site** that were started in the office, or vice versa, so that answers can be reviewed or updated before final submission
- **Review completed interviews** at any time
Easily Create Stylish Self-service Applications

FEB 2016: Touch-friendly Interviews

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**CAPABILITY HIGHLIGHTS**

- **Larger default control sizes** to deliver improved touch screen compatibility
- **New default spacing, font and colors** enhance usability and simplify configuration
- **Left hand navigation bar** option reduces configuration time for tablet screen layouts

**KEY BENEFITS**

- Maximize accessibility and usability on the latest mobile and tablet devices
- Reduce the configuration cost of delivering an up to date modern look and feel
- More easily align with corporate styles and navigation requirements across all self-service experiences and devices
Provide Satisfying Data Collection Experiences
FEB 2016: Free Navigation in Interviews

CAPABILITY HIGHLIGHTS

- Visit interview screens in any order, allowing any data to be collected at any time
- See required remaining screens at a glance, so users can easily understand how much data is yet to be collected
- Automatic screen and question relevance ensures that it is still simple for policy authors to maintain interviews that only prompt for necessary information

KEY BENEFITS

- Customers can conduct self-assessments in the order that makes most sense to them
- Agents can engage one on one with customers in stream of consciousness interviews to efficiently collect data, while still ensuring all necessary questions are answered
Eliminate Manual List Maintenance
FEB 2016: Multi-level Value Lists

CAPABILITY HIGHLIGHTS

- Quickly create cascading selections using hierarchical lists of values
- Load lists of values from the system of record, whenever metadata is refreshed
- Share lists of values between projects by exporting and importing as needed

KEY BENEFITS

- Provide intuitive experiences for selecting related options
- Keep policy models in sync with the latest options, whenever new policies are deployed
- Reuse frequently used hierarchies even for interviews that are connected to different applications
Feature deep dives
Includes information on the following features and enhancements

**Multi-level value lists**
- Filtered drop-down lists
- Lists of values from connections
- XML import / export

**Interview checkpoints**
- Connector actions
- Configuring checkpoint screens
- Saving and resuming checkpoints

**Enhanced interview experience**
- Free navigation
- Left-hand navigation bar
- New control styles

**Other enhancements**
- Pre-seed attributes via URL
- Create shareable project archives
- Session expiry warnings
Multi-level value lists – Overview

Filter and maintain lists of values with rich hierarchical relationships

- Easily provide filtered drop-downs to interview users
  - Show each list level as a separate input
  - Automatically filter “lower” level inputs
- Populate value lists from web service connections and other projects
  - Load as connection metadata
  - Import from XML file
Multi-level value lists – Import from XML

Obtain lists of values from any source that can be converted to XML

- Add multi-level value lists to a project by importing them from an XML file
- Each level is a separate list of values, with an optional list of child values
- Child values can appear in more than one place in the hierarchy
Multi-level value lists – From connections

Obtain lists of values from the connected application

- Web service connections: Value lists in a project can now be populated directly
  - The service must return the full set of levels and values in the GetMetadata response
  - Filterable: As for value lists imported from XML, full multi-level filtering is supported

- Service Cloud: (no change from previous version)
  - Menu lists are shown as a single list with simulated (indented) levels
  - No filtering: any value at any level may be chosen from the list by the user
  - A fixed list of Service Cloud fields supported
Multi-level value lists – Previewing
See hierarchies before using them

- Each level of a hierarchy has its own distinct value list
- The relationship between all levels is shown when working with any level in the hierarchy
- **Display values** can be set as needed
- The final hierarchy of values can be easily previewed

**Note:** The parent/child relationship between values cannot be changed in Policy Modeling
Multi-level value lists – Using

Bind hierarchy levels to individual attributes

- All value lists are available in the type drop down list in Edit Attribute
- When using a value list for the first time, choose Other...
- For a value list that is part of a hierarchy, by default all values in that level are available to be selected
- To enforce the hierarchy of values, a filter must be configured...
Multi-level value lists – Filtering

Flexible collection of different levels of a hierarchical value list

- The Filter by drop-down appears for attributes bound to a list level
- It lists all attributes bound to any higher level in the same hierarchy
- In an interview, the available values depend on the filtering attribute:
  - *Unknown*: No options are available (disabled if on the same screen)
  - *A particular value*: children of that value are shown
Multi-level value lists – Filtering continued

Flexible collection of the values for different hierarchy levels

- Dynamic filtering is supported
  - Multiple levels on the same screen will auto-filter as the selection changes

- Filtering attributes can also be:
  - On separate screens
  - Set by a rule (inferred)
  - Mapped in from a web service connection
Multi-level value lists – Export to XML

Easily reuse value lists with other projects

- Export value lists as XML files
- Any value list can be exported, including those obtained from a connection

<table>
<thead>
<tr>
<th>In Use</th>
<th>Name</th>
<th>Source</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>Temp</td>
<td></td>
<td>60 F / 15.5 C, 61 F / 16.6 C</td>
</tr>
<tr>
<td></td>
<td>Other Value Lists</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Feature Deep Dive

Interview checkpoints
Interview checkpoints – Overview

How to support interview save and resume

• Develop a web service connector that stores and retrieves checkpoint data
• Configure and deploy policy models that create automatic checkpoints
• Start interview with parameters that identify checkpoint owner/scope
• Provide a way to resume saved interview checkpoints
Interview checkpoints – Choose checkpoint screens

Configure the interview screens that will create checkpoints

- The Interview tab provides a new Checkpoints option
- This option can be configured only when the project is mapped to a web service connection that implements the SetCheckpoint action
- Four options are available:
  - Disabled: no checkpoints
  - After submit: checkpoint only after screens with a Submit action button
  - Every screen: checkpoint after every screen
  - Chosen screens: checkpoint after selected screens
- Note that unsuccessfully submitted screens do not result in checkpoints
Interview checkpoints – Connector overview

Connection must implement actions to save and retrieve checkpoint data

- OPA Connector framework has two new web service connector actions
  - `SetCheckpoint` and `GetCheckpoint`
- Both are passed the URL parameters from the interview start / resume URL
- `SetCheckpoint` is called whenever an interview passes a checkpoint screen
  - It is passed the current interview session state as a blob of data
- `GetCheckpoint` is called whenever an interview is resumed
  - Must return a valid interview session state data blob
Interview checkpoints – Saving checkpoints

Checkpoint requests occur automatically during each interview

- Interviews call `SetCheckpoint` when each checkpoint screen is passed
- The developer of `SetCheckpoint` must decide:
  - Where to store checkpoint data
  - How to identify checkpoints using URL parameters
- The developer of `SetCheckpoint` overwrites or creates new checkpoints as required.
  For example:
  - Keep only the most recent checkpoint for each interview session
  - Keep one checkpoint per user for each policy model
Interview checkpoints – Allow users to resume

Must provide a way for users to resume saved checkpoints

✓ The application that holds the checkpoint data should provide a way to resume from saved checkpoints

Examples:

• On a screen showing sales opportunity details, show “in progress” loan applications, and provide a resume link for each one
• On a screen to assess eligibility for student tuition, the link to start an assessment could change to a resume link if the application notices a checkpoint is available
• In either case above, change to a review link if the application notices the loan application has been submitted, which will resume the interview at the final screen
Interview checkpoints – Resuming interviews

Resuming an interview from a known checkpoint

✓ The resume session URL is used to resume an interview from a checkpoint
  • `<site>/web-determinations/resumesession/<policymodel>?<params>`

✓ The URL parameters are passed on to the *GetCheckpoint* action
  • They should indicate which checkpoint to resume, and can take any form. For example:
    
    `.../resumesession/<policymodel>?checkpoint-id=2773+mycontext=ABCD`
  • The GetCheckpoint action must:
    • Load and return checkpoint data: Use the provided URL parameters to retrieve the appropriate checkpoint data from the application database and return it
    • Apply security: Return an error if the requesting user does not have permission to resume the checkpoint that is identified by the provided URL parameters
Interview checkpoints – Resume behavior

The interview resumes from where the checkpoint was made

✓ Whenever possible, the interview is resumed exactly where it was left off:
  • This is the point immediately after the screen that triggered the checkpoint
  • For an interview that was completed, resume can be a convenient way to return to the summary of the interview outcome

✓ If policy models have changed, a best effort is made to resume:
  • If screens have been deleted, or the order has changed significantly, the interview may be resumed at any visible screen
  • If the policy model data model has changed such that session data cannot be loaded, then an error is shown.

✓ Applications should provide a way to delete invalid checkpoints, or the policy model should be corrected so saved checkpoints can always be resumed
Feature Deep Dive
Free navigation
Free navigation – Overview

Allow questions to be answered in any order

- Allow interview stages and screens to be visited in any order
- Easily see whether all information has been provided
- Still use relevance to automatically show/hide stages and screens
- Submit permitted only when all required / relevant screens are complete
Free navigation – New Styles
Easily see which questions are yet to be answered

- Choose the appearance for *complete* and *incomplete* stages and screens
- Use color and icons to indicate where more information is needed
- Override styles to match corporate design guidelines as needed

Customer interview experience

Configuration
Feature Deep Dive

Enhanced interview styles
Enhanced interview styles – Navigation

- New option to show navigation on the left of the interview
- Works for both free and sequential navigation
- New stage and screen menu styles are compatible with both sequential and free navigation
- Override styles to match corporate design guidelines as needed
Enhanced interview styles – Control improvements

- Radio buttons, checkboxes etc. are now larger, so are easier to use on touchscreen devices.
- Default radio button and checkbox colour has changed to blue (can be overridden).
- Tighter spacing for sequences of check-boxes, and for labels before them.

![Example project provides example of gray-scale control images](images/themc.png)
Enhanced interview styles – General appearance

- Default font changed
- Control labels bolded
- Consistent use of blue theme:
  - Selection focus rectangle
  - Back and next buttons
  - Calendar picker icon
  - Etc.
- Smarter use of whitespace
  - Control indenting removed
  - Tighter spacing for containers
Enhanced interview styles – Upgrade experience

- New projects and most upgraded projects get new styles
- Upgraded projects with customized style files retain the previous styles
  - To switch these projects to new styles: disable the compatibility settings in appearance.properties, and make sure customizations appear as expected before deploying a new version
Feature Deep Dive

Other enhancements
Set attributes using URL parameters

Control interview behaviour depending on context

- When starting interview sessions, the value of particular attributes can be set
- For security, only designated attributes may be pre-seeded in this fashion
  - Not to be used for user identification
    - User identity should always be tied to the authenticated user
- Do use to configure interview behaviour
  - E.g. Product or area of interest
  - E.g. Type of reference data to load
  - E.g. Start at a particular interview section
Shareable project archives
Disconnect a project from its Hub repository

- Easily create a project archive that can be shared via email, DropBox etc.
- Removes any OPA Hub associations
  - Repository link is removed
  - Inclusion references are removed
- Easily open project archive by drag and drop into Policy Modeling
  - Automatically extracts the project into the Policy Modeling project folder
Session expiry warnings
Easily extend interviews that are close to expiry

- Users are warned 5 minutes before a web interview session expires
- Acknowledge the warning to extend the session for another 30 minutes
- If not acknowledged, the banner indicates the session has now expired
- Eliminates the surprise of discovering a session has expired only after clicking Next
- Ensures compliance with accessibility requirements for ease of session extension
Use *uncertain* and *unknown* in screen and control conditions

Simplify interview logic when not all data is provided

- Use whether data is *unknown* or *uncertain* to modify interview behavior
  - Show screen if conditions
  - Read-only, required, and visible conditions
  - Examples:
    - If a 1\textsuperscript{st} question was not answered on a previous screen (i.e. is uncertain), always show a particular 2\textsuperscript{nd} question as a fallback
    - If a decision cannot be made based on the data provided (i.e. is unknown), show a particular screen to explain this to the user
Improved refresh for OPA controls in Agent Desktop

Delay start and refresh interviews when workspace record is saved

- No need to close and reopen a workspace to load data into an interview
  - OPA interview only starts when the OPA interview is actually shown
    - E.g. when choose the interview’s tab
  - Can now also optionally restart the OPA interview when a new record is saved
    - Ensures data from the record is loaded into the interview via any defined mappings
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Where to get more information

Background

Documentation

Forums
• RightNow: 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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