Oracle Policy Automation
A Modern Enterprise Policy Automation Solution

Features and Benefits
May 2016
Program Agenda

1. Overview of Oracle Policy Automation
2. New features in May 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 involves many kinds of policies

- Government Policies
- Regulations
- Service Policies
- Organizational Policies
- Legislation
- Product Policies
Customers expect simple, accurate and personalized advice
Required: Customer satisfaction, compliance and agility

Policy Automation
✓ Advise
✓ Audit
✓ Manage
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
Oracle Policy Automation overview

Oracle Policy Automation for Mobile Devices

Mobile App

Mobile SDK

Oracle Policy Automation Cloud Service

Modeling

Interviews

APIs

Management

Cloud Applications

On-Premises Applications
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
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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Highlights of Policy Automation May 2016 Release

✓ Multi-channel:
  Maintain a single interview for both Customer Portal and Agent Desktop

✓ Checkpoints:
  Automatically save and resume Customer portal interviews

✓ Signatures:
  Include captured signatures in generated letters and saved reports

✓ HR self service:
  Samples of OPA for HR help desk scenarios
Easily Maintain Multi-channel Advice

MAY 2016: Deploy one interview for self-service and call center

CAPABILITY HIGHLIGHTS

- **Deploy multi-channel interviews** for both customer self-service advice and call center agents, using a single OPA project
- **Provide agents with interviews that create and update Contact data** even when working in non-contact agent workspaces

KEY BENEFITS

- **Ensure complete consistency** between self-service and call center experiences, while also reducing maintenance costs
- **Improve agent efficiency** by providing them with powerful tools to answer and resolve issues without navigating to other screens
Provide Sticky Advice Experiences

MAY 2016: Customer portal interview checkpoints

CAPABILITY HIGHLIGHTS

- Automatically save interview progress for Contacts logged into Customer Portal
- Choose to resume or start a new interview when revisiting the same advice experience

KEY BENEFITS

- Encourage self-service users to return, by automatically resuming where they left off if they were interrupted
- Reduce configuration costs by automatically saving and showing previously provided advice, with no need to individually map out and save all collected data fields
Embed Auditable Evidence of Identity
MAY 2016: Electronic signatures for generated forms

CAPABILITY HIGHLIGHTS
 Embed captured signatures directly in generated PDF forms, including signatures for multiple parties, if needed

KEY BENEFITS
 Provide visually verifiable evidence of identity of the customer that received advice or performed a particular transaction, or of the agent that performed an inspection
Demonstrate OPA for HR help desk

MAY 2016: Human Resources Self Service Example Project

CAPABILITY HIGHLIGHTS

- New **parental leave** example project demonstrates a common human resources use case

KEY BENEFITS

- Build a **business case** for Policy Automation for self-service HR scenarios
Feature Deep Dive
Multi-channel Service Cloud interviews
Multi-channel Service Cloud interviews – Overview
Consistent, low maintenance advice for self-service and call center

- Deploy a single OPA interview for both Customer Portal and Agent Desktop
- Load and update Contact and related information:
  - in Customer Portal interviews
  - in Agent Desktop Contact workspace
  - In any Agent Desktop workspace with a relationship to Contact (e.g. Incident, custom object)
- Create new records related to Contact
Multi-channel Service Cloud interviews
Deploy a single interview for customers and agents

- Maintain and deploy a single secure interview for agents and customers
- Contacts interact with the interview:
  - when logged into Customer Portal
  - using the OPA widget
  - if not logged in, access is denied
- Agents interact with the interview:
  - using the OPA control
  - inside an Agent Desktop workspace, or
  - in a browser using single sign on
Multi-channel Service Cloud interviews

Work with Contact information in any agent workspace

- Even when using an OPA interview in an Agent Desktop *non-Contact* workspace:
  - the related contact can be loaded
  - the related contact can be updated
  - other information related to the contact can also be updated
  - a new record related to Contact can be created
Feature Deep Dive

Customer Portal Interview Checkpoints
Interview checkpoints in Customer Portal - Overview

Provide sticky experiences for self-service advice

- Checkpoints are automatically used for Customer Portal interviews
- Customer can choose
  - to resume previous interview
  - to start a new interview
- To enable:
  1. Configure Service Cloud to store OPA checkpoints
  2. Choose screens that create checkpoints
  3. Contact must be logged in when interview is displayed
Interview checkpoints in Customer Portal

One time configuration to add support to a Service Cloud instance

- Import provided package to create the necessary custom object
  - A single custom object will created in “OPA” namespace
  - All checkpoints for all contacts will be saved here
  - Recommended to periodically review and remove stale checkpoints
Interview checkpoints in Customer Portal
Configure checkpoints in Policy Modeling

To configure checkpoints for a policy model, in Policy Modeling:

1. Choose a Service Cloud connection for the project (Service Cloud instance must be configured for checkpoints)
2. On Interview tab, choose screens after which checkpoints will be created
Interview checkpoints in Customer Portal
Use widget parameters to configure checkpoint behavior

✓ Configure interview checkpoint behaviour in Customer Portal

• New OPA widget parameters:
  o `disable_checkpoint_resuming`
  o `resume_without_prompt`
  o `resume_prompt_html`

```plaintext
resume_prompt.html
• Name: Resume Prompt HTML
• Type: STRING
• Description: The prompt to display to the user if they have a Checkpoint saved for the interview, where clicking ‘Continue’ would resume that Checkpoint, and ‘Start Over’ would start a new session and overwrite the existing Checkpoint when specific points of the interview are reached. If ‘disable_checkpoint_resuming’ or ‘resume_without_prompt’ is set to true then this attribute is ignored.
• Default: We notice you’ve been here before. <p> <button type=’button’ id=’opa_start_button’ onClick=’.ResumeOpainterview()’>Continue</button> <p><br/>I’d like to <a href=’#’ onClick=’StartViewOpainterview()’>start over</a>. <p>

resume_without_prompt
• Name: Resume from Checkpoints without prompting
• Type: BOOLEAN
• Description: If set to ‘true’ and the user already has a Checkpoint for the interview then the resume session URL will be called without displaying the prompt. If ‘disable_checkpoint_resuming’ is set to true then this attribute is ignored.
• Default: false
```
Interview checkpoints in Customer Portal

Multiple checkpoints are stored for each Contact

- One saved checkpoint is associated with each interview context:
  1. the logged in contact, plus
  2. the record identifier (initid) passed as a parameter to the OPA widget
  3. the policy model for the interview

- This allows a contact to have multiple interviews in progress
  - E.g. have concurrent open cases
  - E.g. for different types of problems (interviews)
Interview checkpoints in Customer Portal

Checkpoints are automatically updated

• The saved checkpoint for the interview context is updated whenever a screen with a checkpoint is completed

• This includes
  ✓ After resume, when any screen with a checkpoint is completed
  ✓ If start over, when the first screen with a checkpoint is completed
  ✓ In an existing interview, when a new screen with a checkpoint is completed
Interview checkpoints in Customer Portal

Checkpoints are available even for submitted interviews

- Completed interviews automatically resume at the final screen
- Customer cannot resubmit the interview, but can review outcomes, download generated forms, etc.
Feature Deep Dive

Create contact if not logged in
Optionally create a new user account - Overview

Maintain a single experience that engages new and existing customers

- Deploy a single OPA interview for both:
  - Logged in Customer Portal contacts
  - Unknown/new Customer Portal users
- For logged in contacts:
  - Update existing Contact information when the interview completes
- For unknown/new users:
  - Create a new Contact record for them
- In both cases:
  - Also create an Incident or any other record
Optionally create a new user account

Authoring experience

- Uncheck Contact must be logged in
- Note the new Load when available option for attributes mapped in from Contact
  - Works like Load at start when a Contact is logged in to Customer Portal before the interview starts
  - Works like Load after submit when the interview is used anonymously
Other New Features
Include captured signatures in generated forms
Prove the identity of advice recipients or providers

✔ Embed an electronic signature directly in a generated PDF form
  • For a single party
  • For multiple parties

✔ Provide visually verifiable evidence of identity
  • Of client that acknowledged advice
  • Of customer that performed a transaction
  • Of agent that performed an inspection
  • Etc.
Human Resources Self Service Example Project
Easily demonstrate the applicability of Policy Automation for HR help desk

- New parental leave example project
  - Applies leave policy and statutory rights
  - Presents leave options for consideration
  - Generates leave request form or save to your existing HR system

- Already in use by customers
  - Part of the full HR Accelerator developed by Oracle Consulting
  - Available in EMEA for Oracle employees
  - Has been adapted and deployed for Oracle Policy Automation customers
New Customer Portal interview widget parameters
More easily configure appearance and behaviour of self-service interviews

✓ New parameters allow easier interview widget configuration
✓ Change the widget iframe size
  - *height*
  - *width*
✓ Initialize URL parameter attributes
  - *seed-data*
✓ Configure checkpoint behavior
  - *disable_checkpoint_resuming*
  - *resume_without_prompt*
  - *resume_prompt_html*
Java Engine API (Private Cloud Only)
Upgrade direct integration solutions from V10.x

- Revised Java Engine API
  - Provides access to low-level OPA API
  - Make decisions, get reports
- Available for private cloud edition only
  - Simple to upgrade for v10 users
  - Designed for partners and others that embedded OPA engine in custom solutions
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Where to get more information

Background

• Oracle Service Cloud: https://cloud.oracle.com/service-cloud

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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Hardware and Software
Engineered to Work Together