

ORACLE®
University

Integrated Cloud Applications & Platform Services

Introduction to Oracle Policy Automation

Activity Guide

D93644GC30 | D106452

Learn more from Oracle University at education.oracle.com

ORACLE®

Authors

Phil Franklin

Fiona Guy

Matt Sevin

Technical Contributor

Mark Hesse

Editor

Nikita Abraham

Publishers

Sujatha Nagendra

Asief Baig

Veena Narasimhan

3005072019

Copyright © 2019, Oracle and/or its affiliates. All rights reserved.

Disclaimer

This document contains proprietary information and is protected by copyright and other intellectual property laws. You may copy and print this document solely for your own use in an Oracle training course. The document may not be modified or altered in any way. Except where your use constitutes "fair use" under copyright law, you may not use, share, download, upload, copy, print, display, perform, reproduce, publish, license, post, transmit, or distribute this document in whole or in part without the express authorization of Oracle.

The information contained in this document is subject to change without notice. If you find any problems in the document, please report them in writing to: Oracle University, 500 Oracle Parkway, Redwood Shores, California 94065 USA. This document is not warranted to be error-free.

Restricted Rights Notice

If this documentation is delivered to the United States Government or anyone using the documentation on behalf of the United States Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS

The U.S. Government's rights to use, modify, reproduce, release, perform, display, or disclose these training materials are restricted by the terms of the applicable Oracle license agreement and/or the applicable U.S. Government contract.

Trademark Notice

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Juliano Silva (juliano.c.da.silva@accenture.com) has a non-transferable license to use this Student Guide.

Table of Contents

Practices for Lesson 2: Getting Started	5
Practice 2: Getting Started	6
Solution for Practice 2: Getting Started.....	11
Practices for Lesson 3: User Interface	13
Practice 3: Opening and Navigating an Example Project	14
Practices for Lesson 5: Writing Rules.....	15
Practice 5-1: Applying Styles.....	16
Solution for Practice 5-1: Applying Styles	17
Practice 5-2: Using the Rule Assistant.....	21
Solution for Practice 5-2: Using the Rule Assistant	22
Practices for Lesson 6: Creating Interviews	27
Practice 6: Creating Interviews.....	28
Solution for Practice 6: Creating Interviews	29

Juliano Silva (juliano.c.da.silva@accenture.com) has a non-transferable license to use this Student Guide.

Practices for Lesson 2: Getting Started

Juliano Silva (juliano.c.da.silva@accenture.com) has a non-transferable license to use this Student Guide.

Practice 2: Getting Started

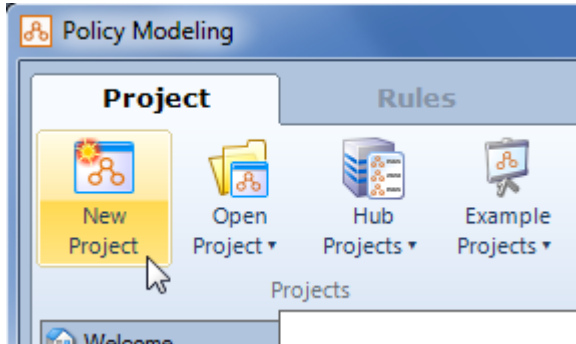
Goal: To create a project and rule, and run the project in the Oracle Policy Modeling Debugger

Scenario: You are creating a simple project to become familiar with Oracle Policy Modeling.

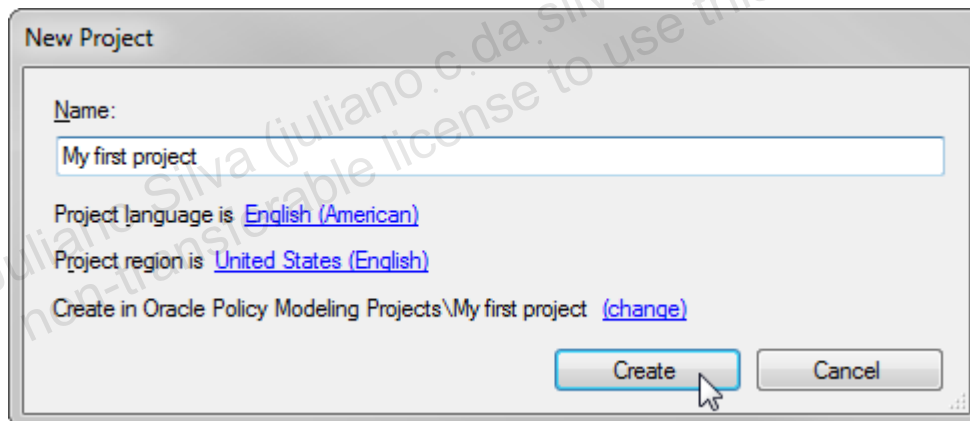
Outcome: You will have created a simple functioning Policy Model.

Tasks

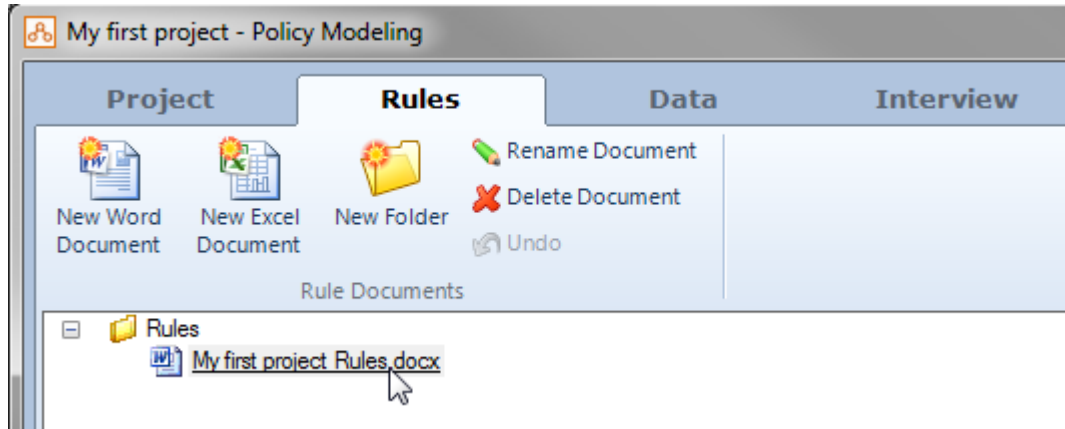
1. Open **Oracle Policy Modeling**.
2. Select **New Project**.



3. In the Name field, type "My first project" and leave all the other settings unchanged. Click **Create**.

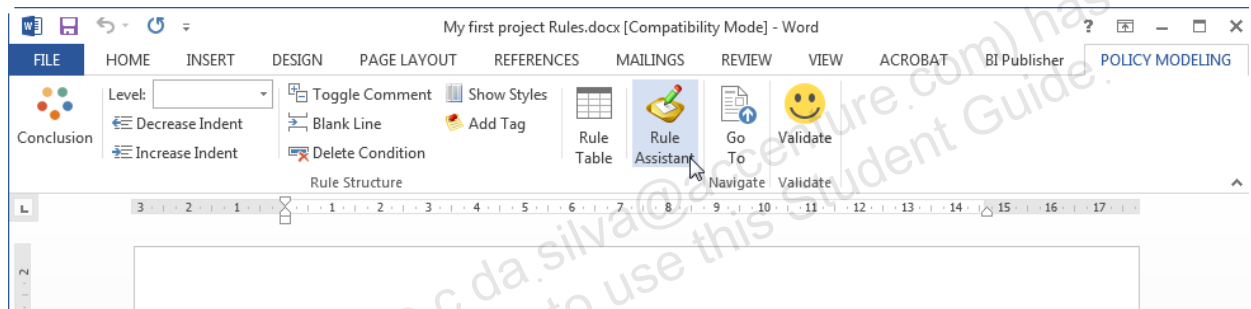


4. On the **Rules** tab, double-click **My first project Rules.docx** to open the document.

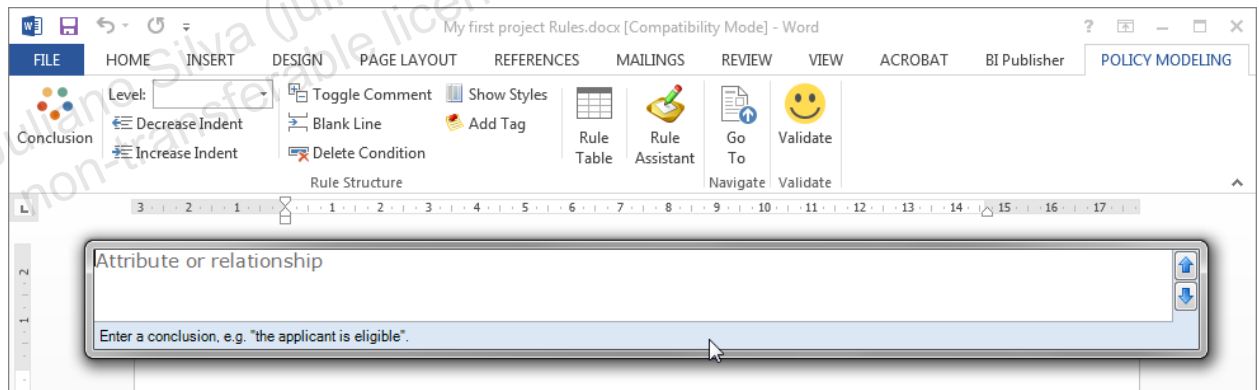


Microsoft Word should open showing a blank document.

5. On the **Policy Modeling** toolbar, click **Rule Assistant**.



The Rule Assistant pop-up should appear.

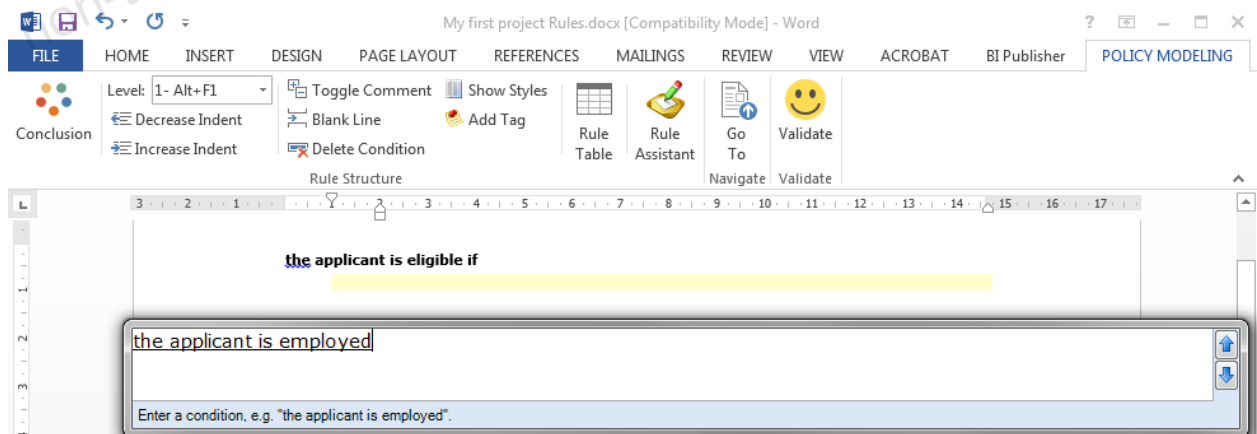
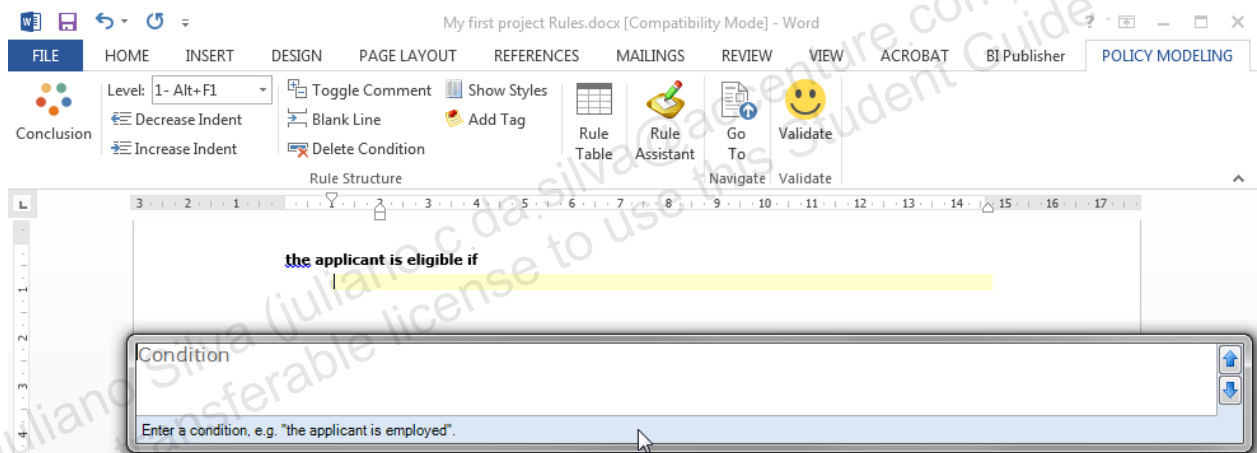
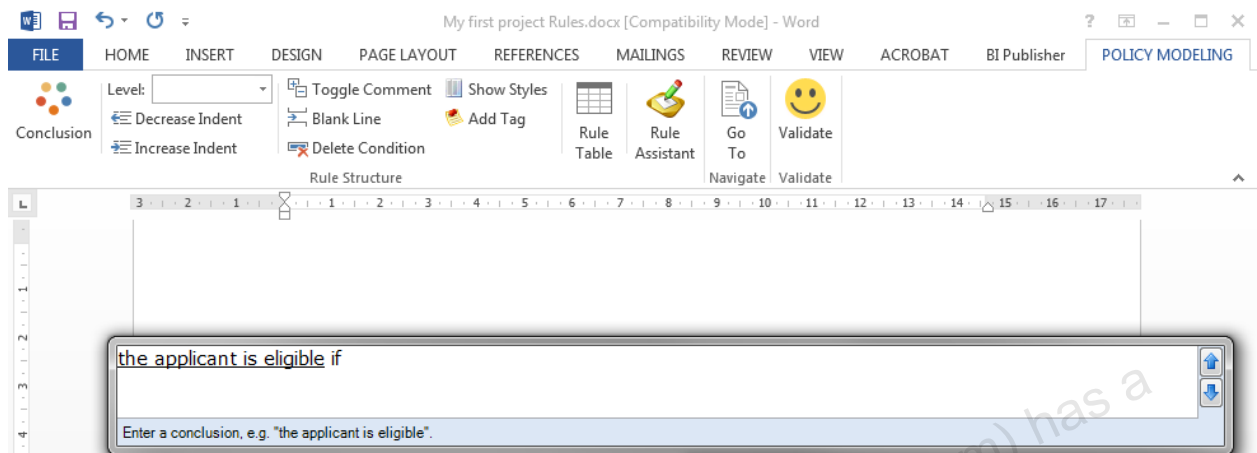


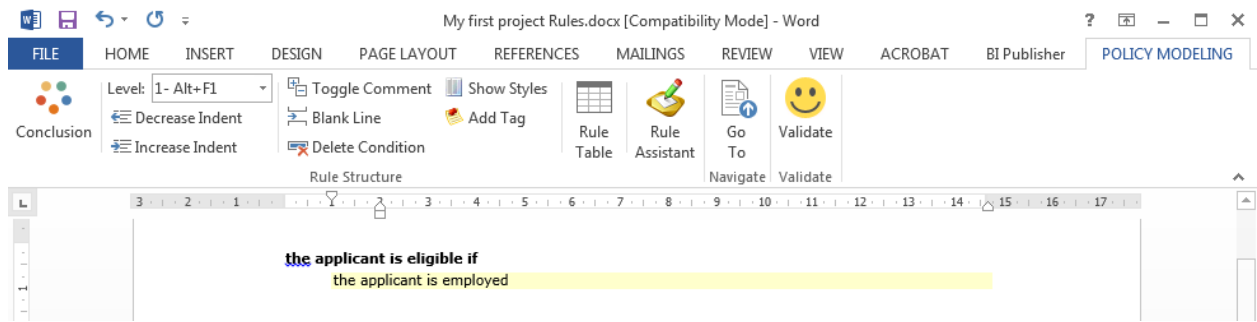
TIP: If the Rule Assistant pop-up disappears, just click **Rule Assistant** again.

6. Type the following rule. Remember to press **Enter** at the end of each line.

The applicant is eligible if

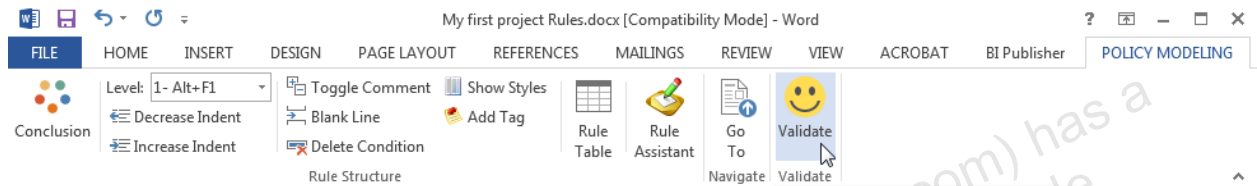
The applicant is employed



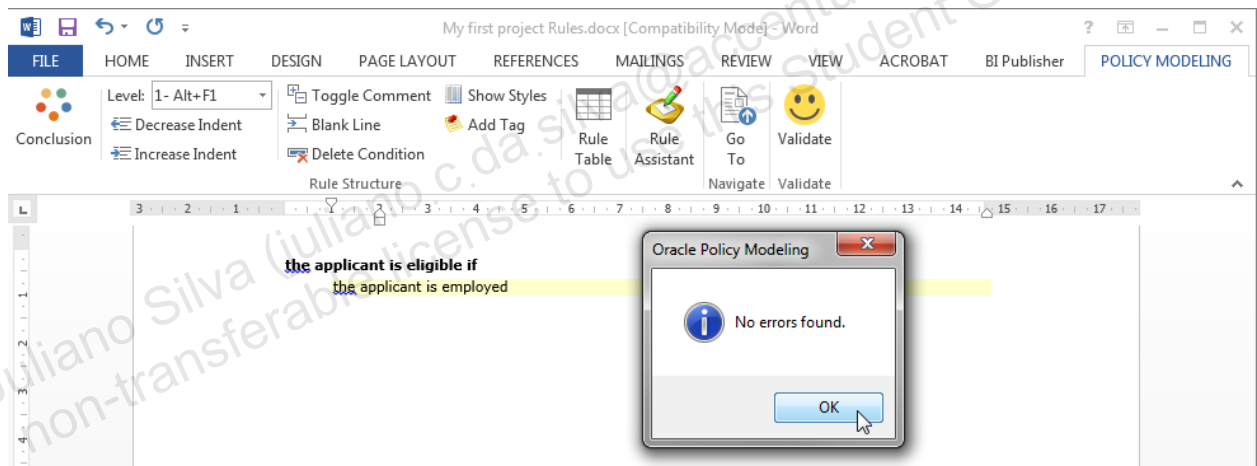


TIP: If you make a mistake, delete the text in your document and start again. Remember to type the whole rule, pressing Enter after each line.

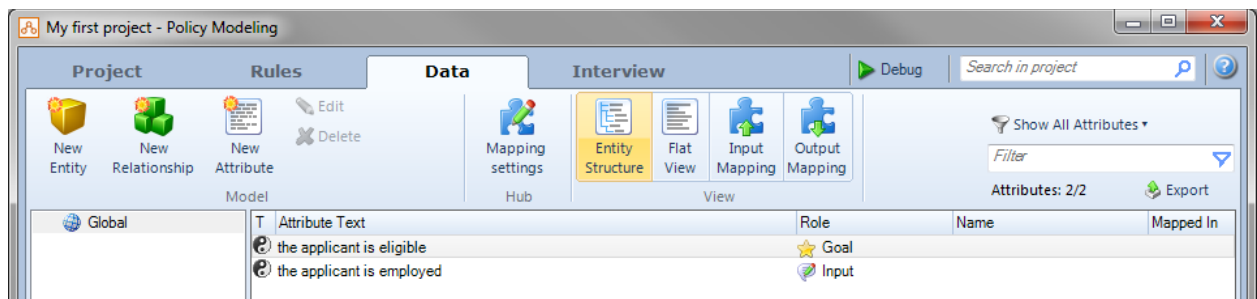
7. Click the **Validate** button.



8. Click **OK**.



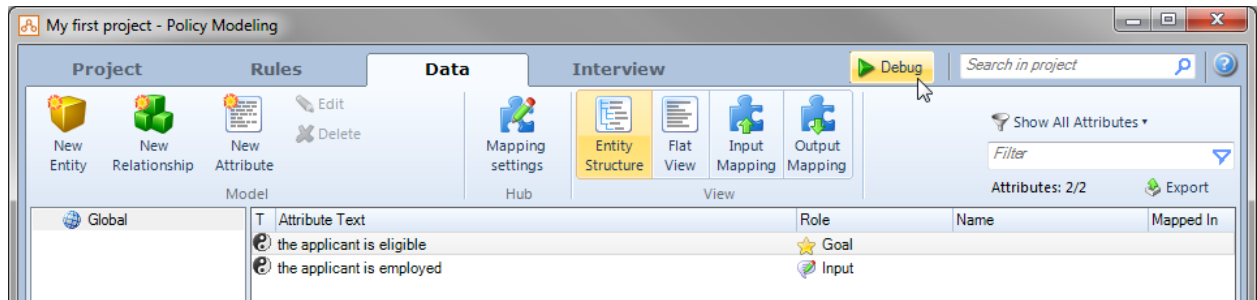
9. Back in Oracle Policy Modeling, click the **Data** tab.



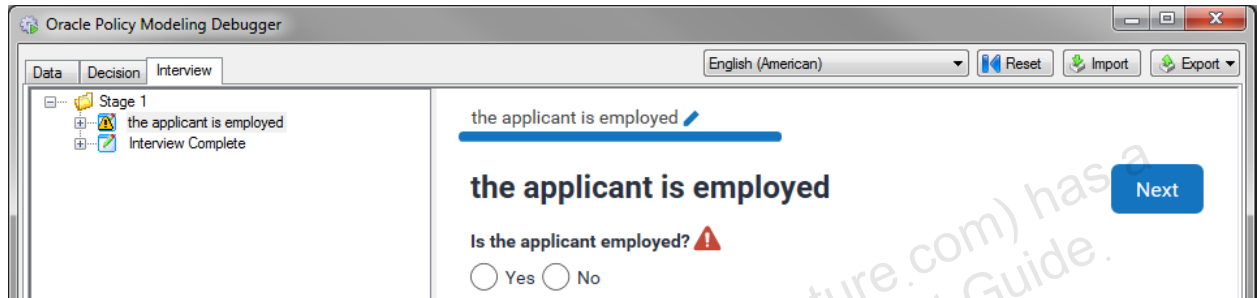
You should see “the applicant is employed” and “the applicant is eligible.”

TIP: If you do not see these attributes, check if you have clicked the Validate button as described in the previous steps.

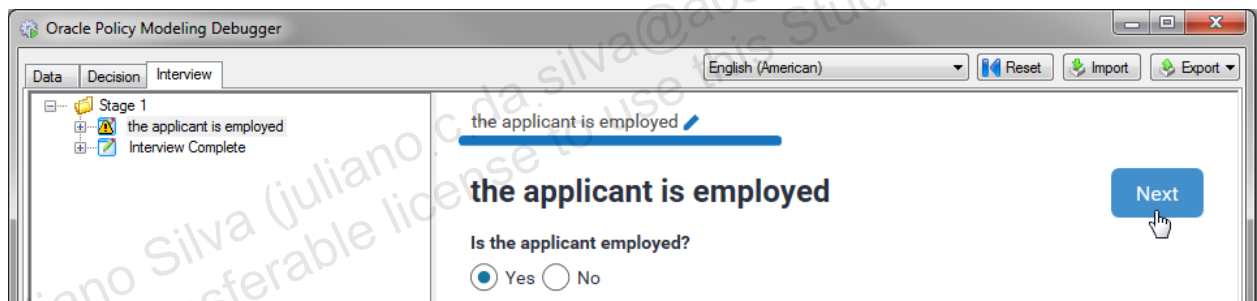
10. Click **Debug**.



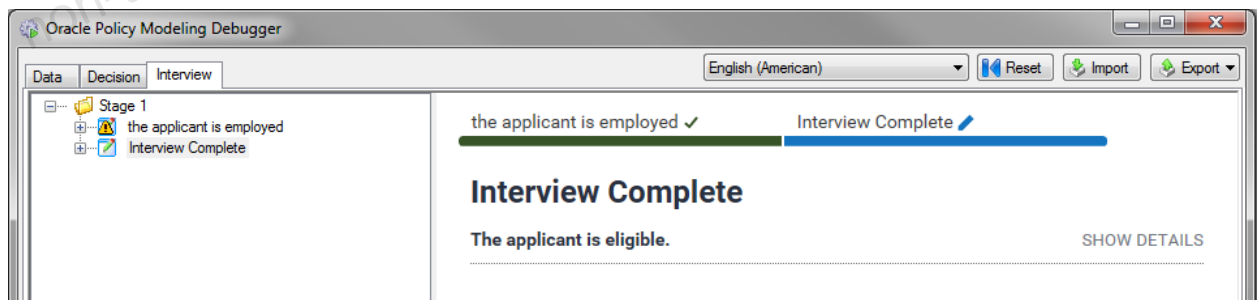
The Oracle Policy Modeling Debugger should open in a new window.



11. Select **Yes** to “the applicant is employed” and then click **Next**.



The Interview Complete screen should be shown with the result “The applicant is eligible.”



Solution for Practice 2: Getting Started

Solution

The practice has been completed successfully if all the steps have been followed.

Juliano Silva (juliano.c.da.silva@accenture.com) has a non-transferable license to use this Student Guide.

Juliano Silva (juliano.c.da.silva@accenture.com) has a non-transferable license to use this Student Guide.

Practices for Lesson 3: User Interface

Juliano Silva (juliano.c.da.silva@accenture.com) has a non-transferable license to use this Student Guide.

Practice 3: Opening and Navigating an Example Project

Overview

Goal: To effectively navigate an Oracle Policy Modeling project

Scenario: You are joining a team of Policy Modelers working on an Insurance project and you have been tasked with familiarizing yourself with how the project has been authored.

Outcome: You will have more confidence navigating the different views in Oracle Policy Modeling.

Tasks

1. Open **Oracle Policy Modeling**.
2. Open the **Example Project Insurance Picker** from the Project toolbar.
3. Answer the following questions:
 - 1) How many Excel rule documents are in the project?
 - 2) What question is on the “Tell us a bit about you” screen?
 - 3) When you Debug the interview, what picture appears at the top of the interview?

Practices for Lesson 5: Writing Rules

Juliano Silva (juliano.c.da.silva@accenture.com) has a non-transferable license to use this Student Guide.

Practice 5-1: Applying Styles

Overview

Goal: To identify and apply appropriate Policy Modeling rule styles in Word

Scenario: You have been provided with some rules that your manager wants to see automated with Policy Modeling.

Outcome: The attributes will correctly appear in Oracle Policy Modeling.

Tasks

1. Open **Project** from **D:\labs\StarterFiles\Writing Rules Practice 1**.
2. Open the rule document in the project.
3. Apply the appropriate styles from the Policy Modeling toolbar.
4. **Validate** your rule document.

Juliano Silva (juliano.c.da.silva@accenture.com) has a non-transferable license to use this Student Guide.

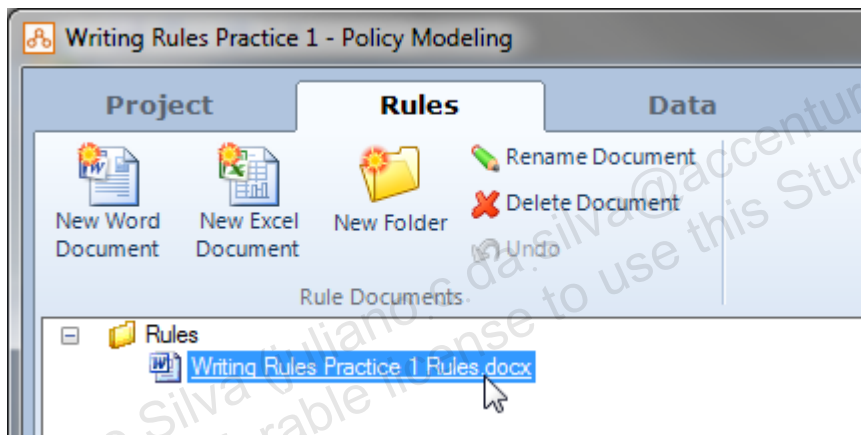
Solution for Practice 5-1: Applying Styles

The rule document should look like this:

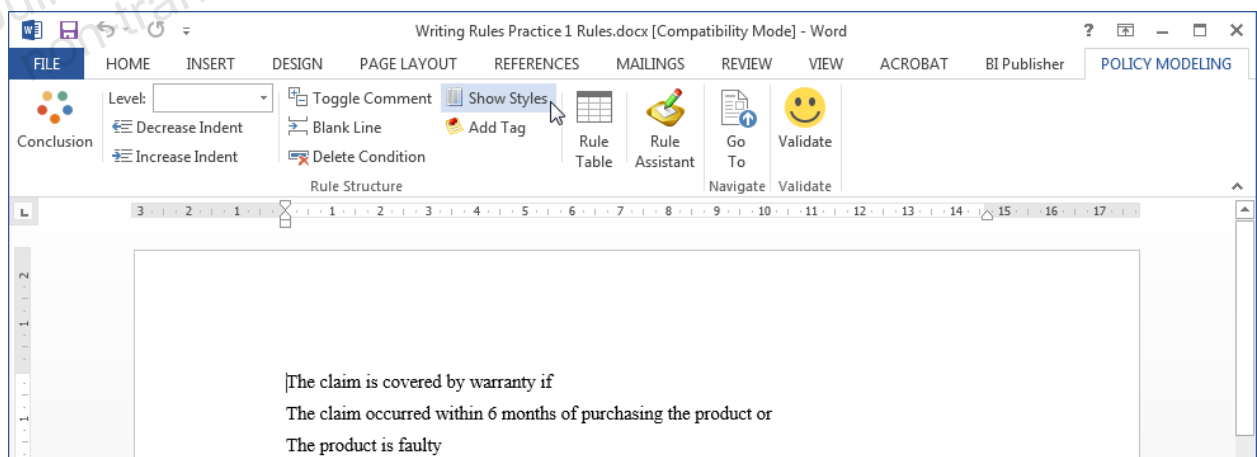
OPM - conclusion	The claim is covered by warranty if
OPM - level 1	The claim occurred within 6 months of purchasing the product or
OPM - level 1	The product is faulty
Normal	
OPM - conclusion	The product is faulty if
OPM - level 1	The product has been recalled by the manufacturer or
OPM - level 1	A certified repairer has determined that the product is faulty
Normal	

Step-by-Step Solution

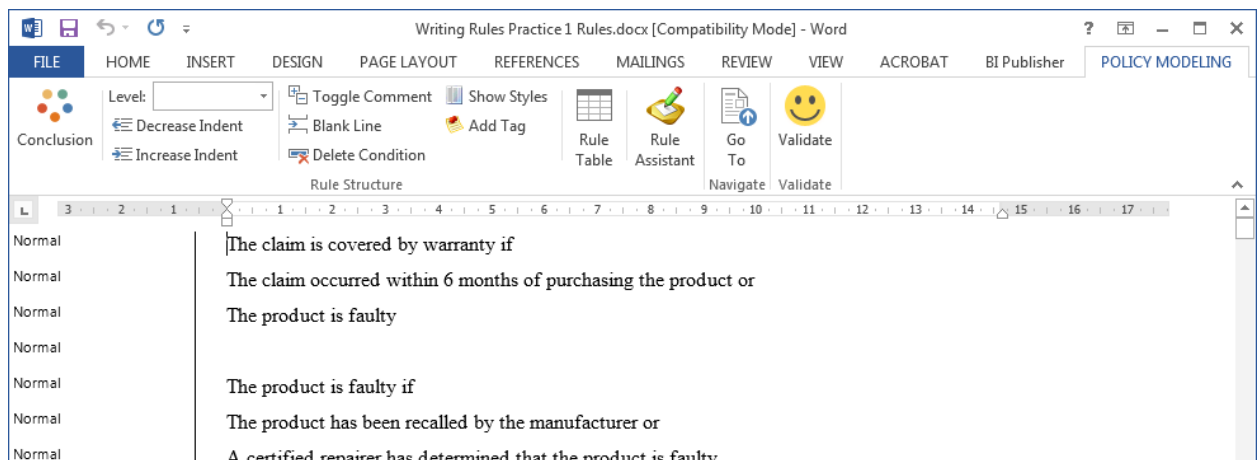
1. Open **Project** from **D:\labs\StarterFiles\Writing Rules Practice 1**.
2. Click the **Rules** tab and open the rule document.



3. Click **Show Styles** on the Policy Modeling toolbar.



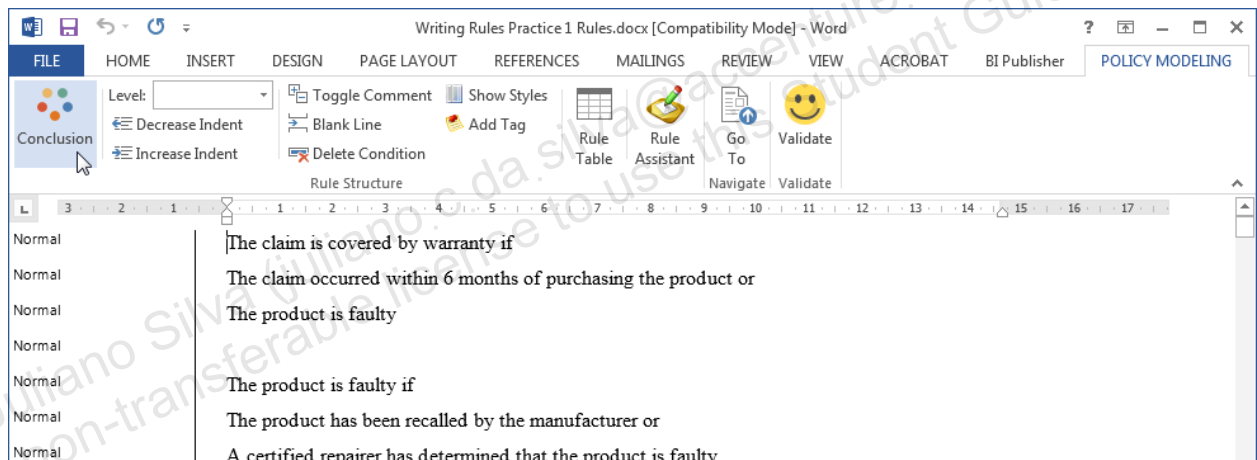
Styles should now be visible in the left-hand pane:



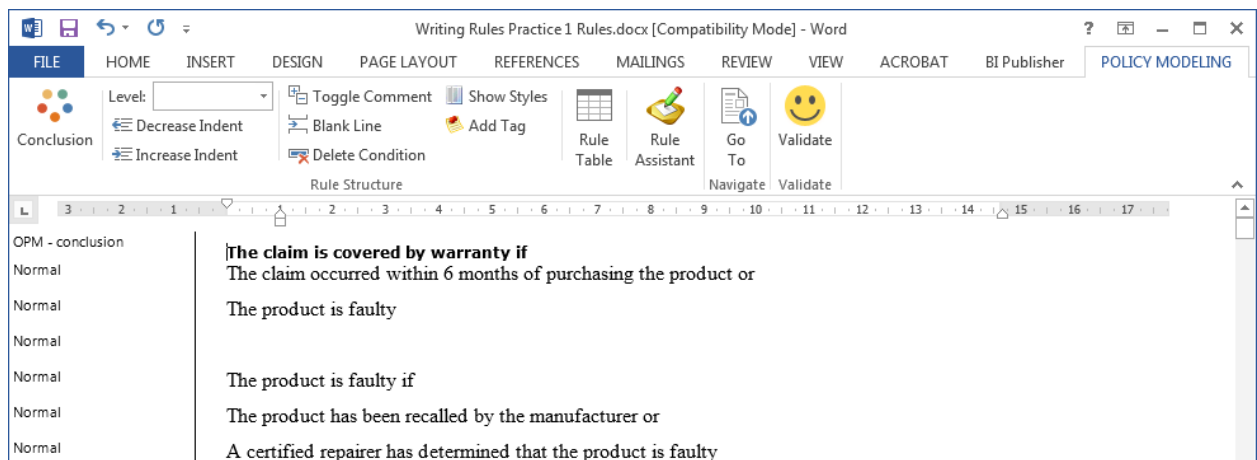
Tip: If the style area is not visible, go to the View menu and check whether you are in Draft view.

4. Apply the appropriate styles from the Policy Modeling toolbar.

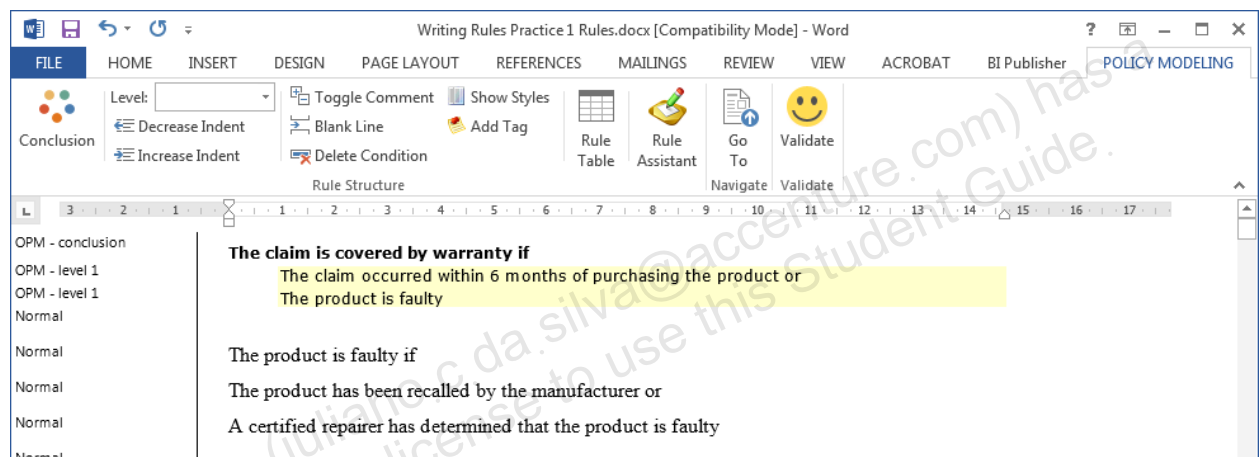
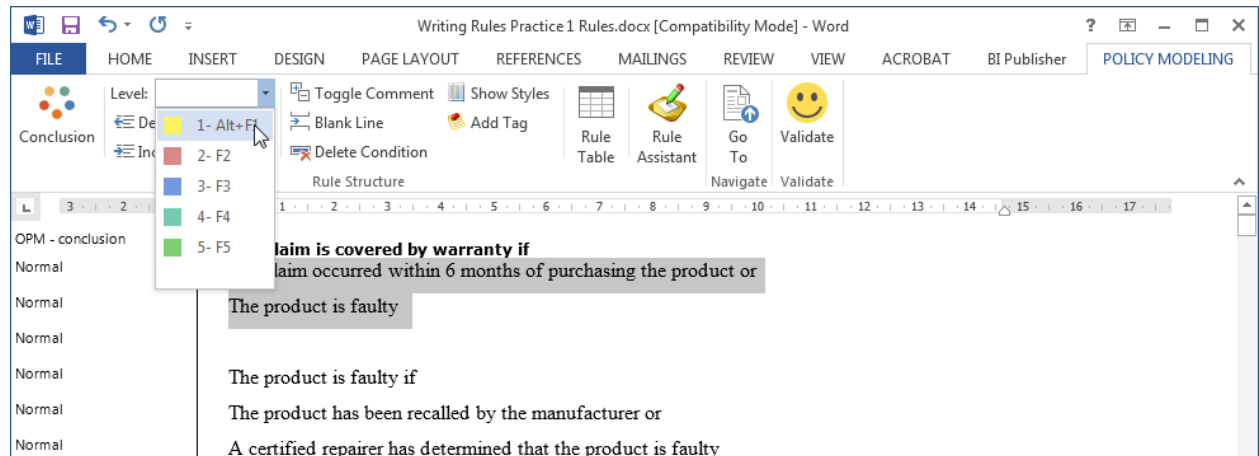
Place your cursor on the line “the claim is covered by warranty” and click the **Conclusion** button on the Policy Modeling toolbar.



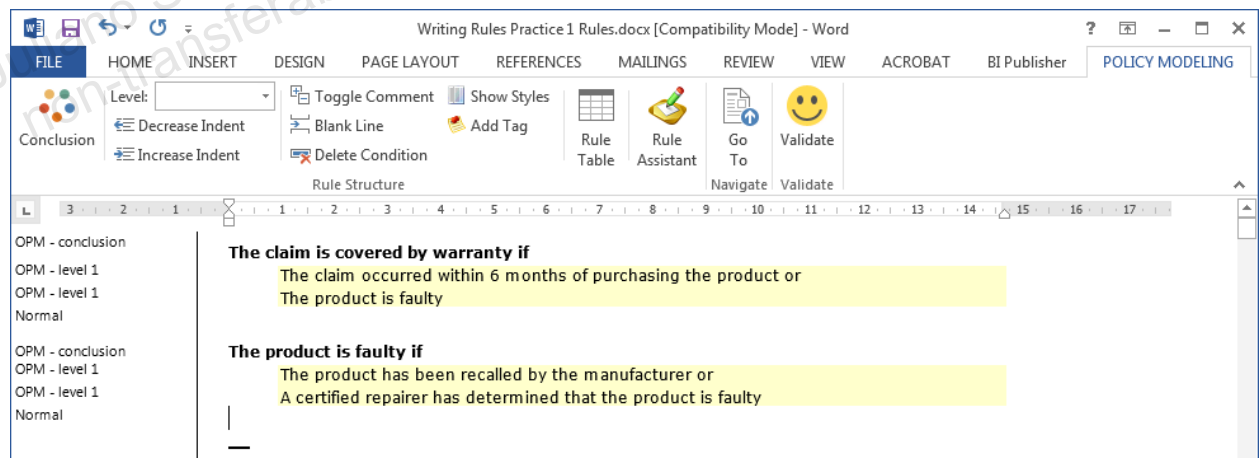
The text should change to **OPM – Conclusion** style.



Highlight the next two lines of text and select **Level: 1** on the Policy Modeling toolbar.

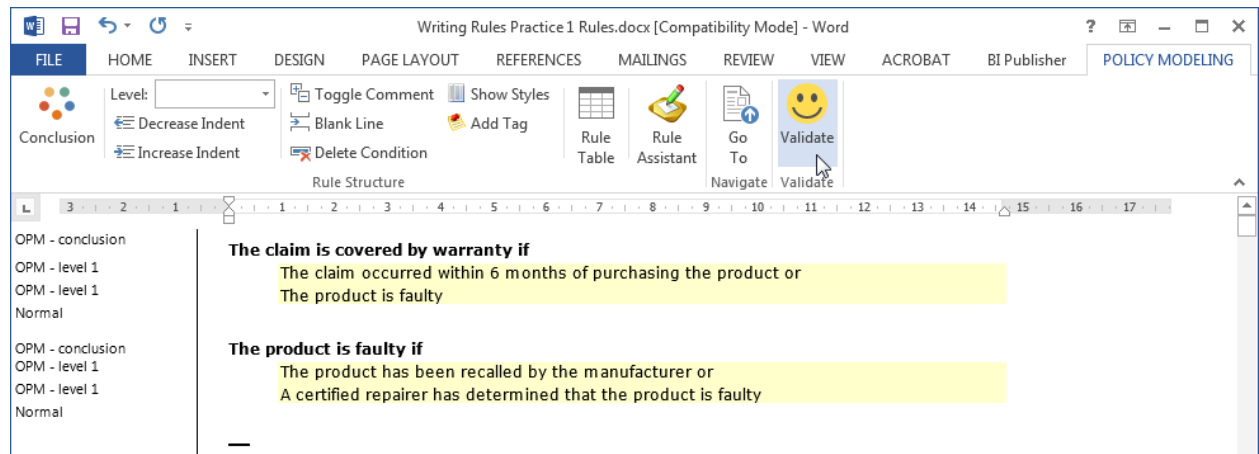


Repeat these steps for the next rule.

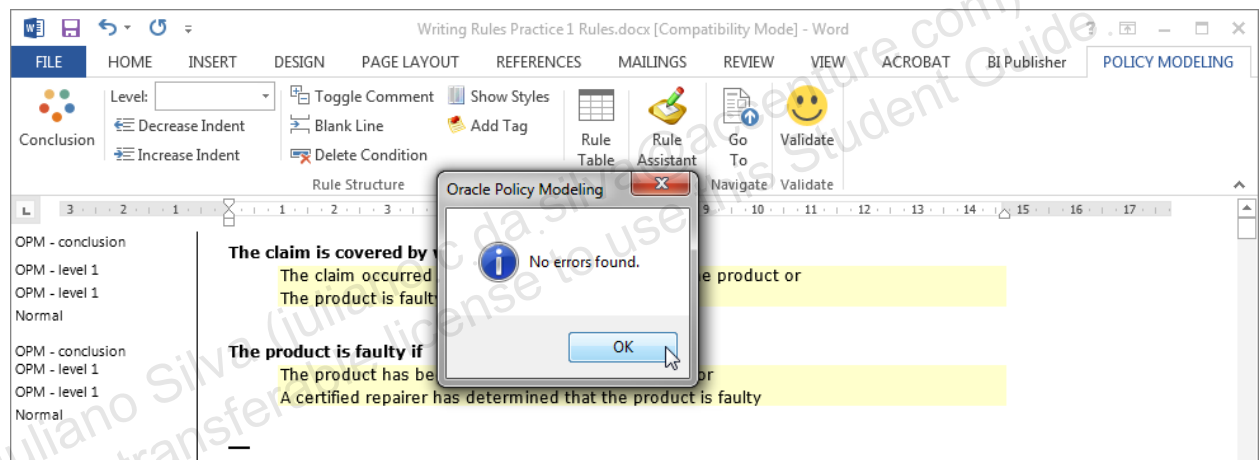


5. Validate your rule document.

Click the **Validate** button on the Policy Modeling toolbar.



Click **OK**.



6. In Policy Modeling, click the **Data** tab. The practice has been successfully completed if:

- The product has been recalled by the manufacturer is an **input**
- A certified repairer has determined that the product is faulty is an **input**
- The product is faulty is an **intermediate**
- The claim is covered by warranty is a **goal**
- The claim occurred within 6 months of purchasing the product is an **input**

Practice 5-2: Using the Rule Assistant

Overview

Goal: To write a rule using the Policy Modeling Rule Assistant in Word

Scenario: You have been provided with a rule that your manager wants to see automated with Policy Modeling.

Outcome: The attributes will correctly appear in Oracle Policy Modeling.

Tasks

1. Create a new project in Policy Modeling.
2. Name it **Writing Rules Practice 2**.
3. Open the rule document.
4. Use the Rule Assistant to model the following rule:
The applicant is eligible if the applicant is employed and the applicant has submitted an application form.
5. Validate your rule document.
6. Check the Data tab to confirm that all attributes have been created correctly.

Solution for Practice 5-2: Using the Rule Assistant

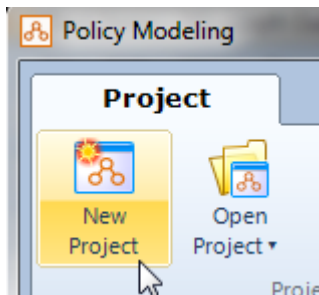
The rule document should look like this:

OPM - conclusion	the applicant is eligible if
OPM - level 1	the applicant is employed and
OPM - level 1	the applicant has submitted an application form
Normal	

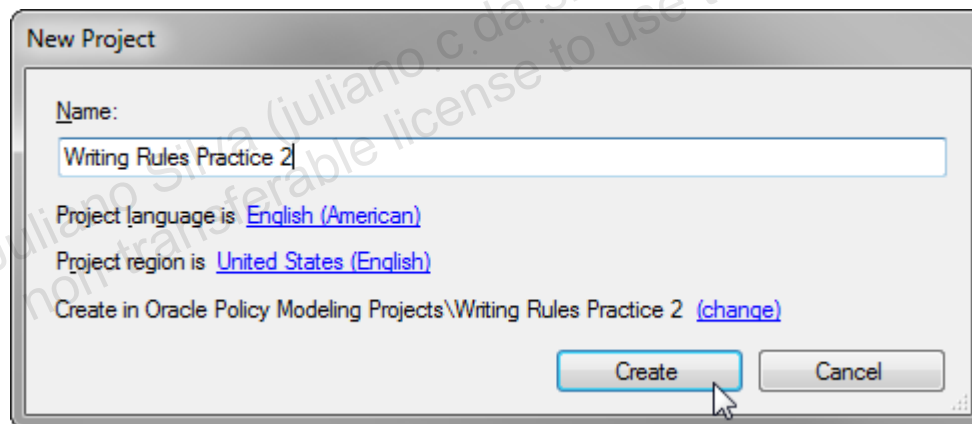
Step-by-Step Solution

1. Create a new project in Policy Modeling.

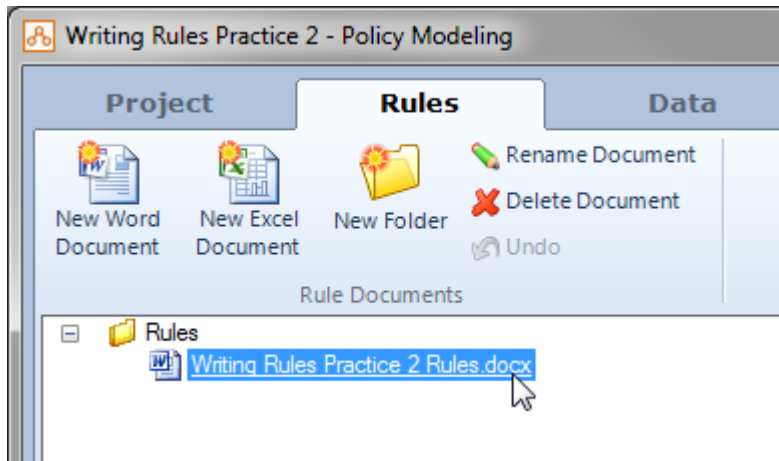
Click **New Project**.



Type **Writing Rules Practice 2** and click **Create**.



2. On the **Rules** tab, open the rule document.



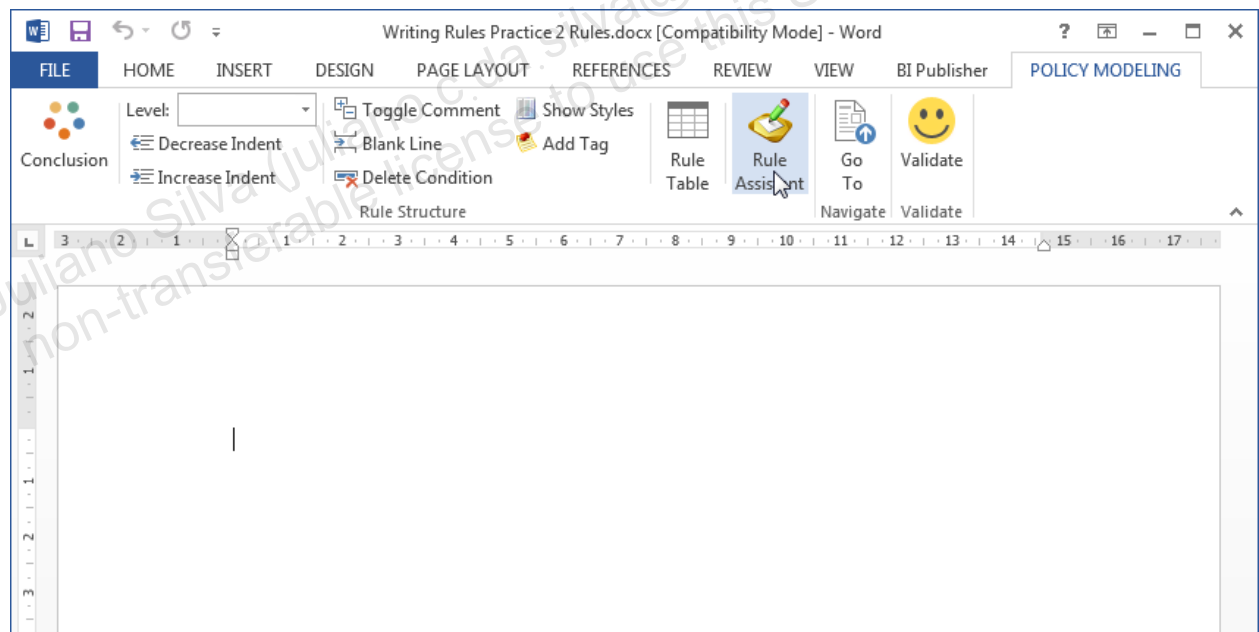
3. Use the Rule Assistant to model the following rule:

The applicant is eligible if

The applicant is employed and

The applicant has submitted an application form

On the Policy Modeling toolbar, click **Rule Assistant**.



Type "the applicant is eligible." Press **Enter**.

the applicant is eligible

Enter a conclusion, e.g. "the applicant is eligible".

Create Boolean rule
the applicant is eligible if
condition

Create assignment rule

Type "the applicant is employed and." Press **Enter**.

the applicant is eligible if

the applicant is employed and

Enter a condition, e.g. "the applicant is employed".

Type "the applicant has submitted an application form." Press **Enter**.

the applicant is eligible if
the applicant is employed and

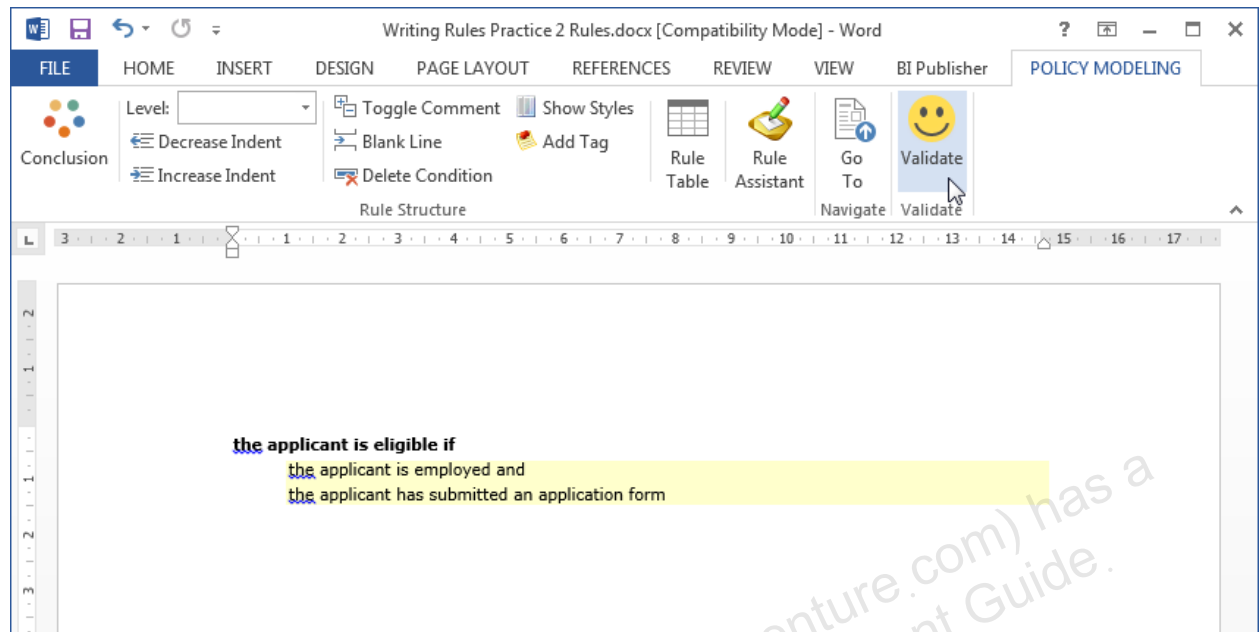
the applicant has submitted an application form

Enter a condition, e.g. "the applicant is employed".

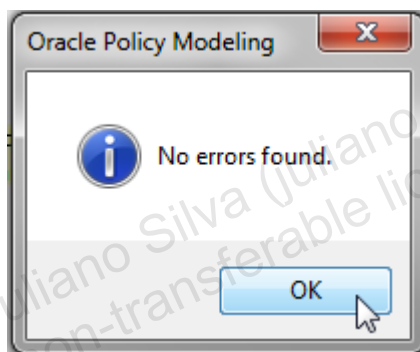
Accept condition and add another
condition and
condition

4. Validate your rule document.

Click the **Validate** button on the Policy Modeling toolbar.



Click **OK**.



5. In Policy Modeling, click the **Data** tab. The practice has been successfully completed if:
- the applicant has submitted an application form is an **input**
 - the applicant is employed is an **input**
 - the applicant is eligible is a **goal**

Juliano Silva (juliano.c.da.silva@accenture.com) has a
non-transferable license to use this Student Guide.

Practices for Lesson 6: Creating Interviews

Juliano Silva (juliano.c.da.silva@accenture.com) has a non-transferable license to use this Student Guide.

Practice 6: Creating Interviews

Overview

Goal: To create and test an interview in Policy Modeling

Scenario: You have been provided with some rules to determine whether a customer is eligible for a loan. It is your job to create the interview.

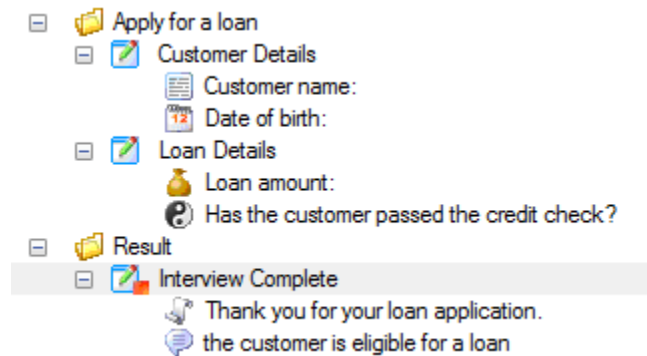
Outcome: The interview will correctly appear in the Policy Modeling Debugger.

Task

1. Open **Project** from **D:\labs\StarterFiles: Creating Interviews Practice 1**.
2. Create an interview where the first screen is “Customer Details.”
 - a. The Customer Details screen should collect the attributes “the customer” and “the customer’s date of birth”.
 - b. The question for “the customer” should be “Customer name:”
 - c. The question for “the customer’s date of birth” should be “Date of birth:”
 - d. “The customer’s date of birth” should be collected as a multi-input drop-down list.
3. The second screen in the interview should be “Loan Details.”
 - a. The attributes to collect are “the customer has passed the credit check” and “the amount the customer would like to borrow”.
 - b. The question for “the amount the customer would like to borrow” should be “Loan amount:”
 - c. Ensure that the loan amount is the first question on this screen.
4. The first stage of the interview should be “Apply for a loan.”
5. The second stage should be called “Result.”
6. The Interview Complete screen should be in the “Result” stage.
7. Ensure a label which says “Thank you for your loan application” appears on the Interview Complete screen.
8. Test your screens to ensure all the above requirements are met.

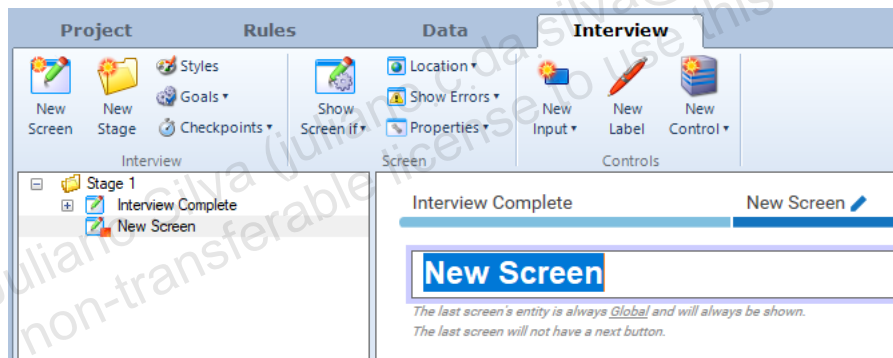
Solution for Practice 6: Creating Interviews

The interview tab should look like this:

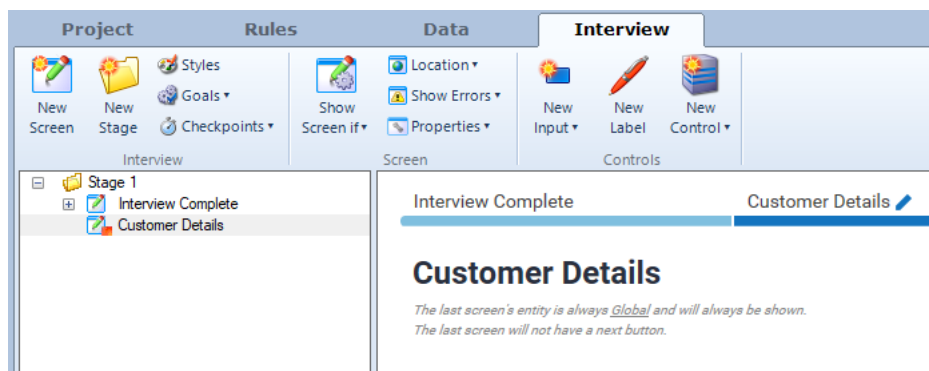


Step-by-Step Solution

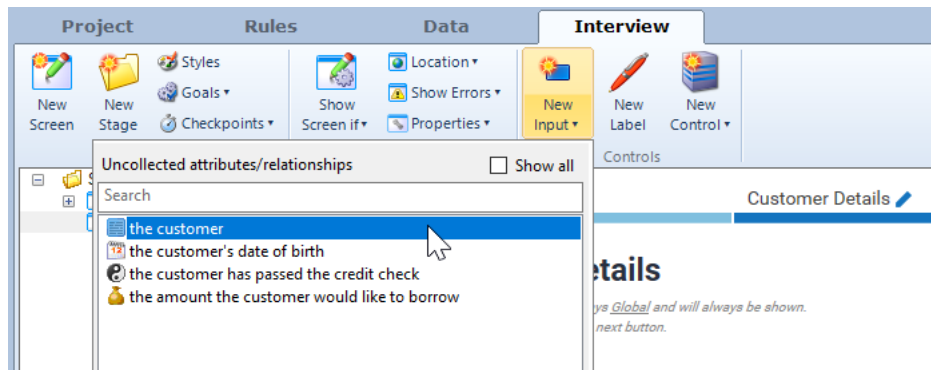
1. Open **Project** from **D:\labs\StarterFiles\Creating Interviews Practice 1**.
2. Click the **Interview** tab.
3. Click **New Screen** to create a new screen.
4. Click the title of the screen “New Screen” in the right pane.



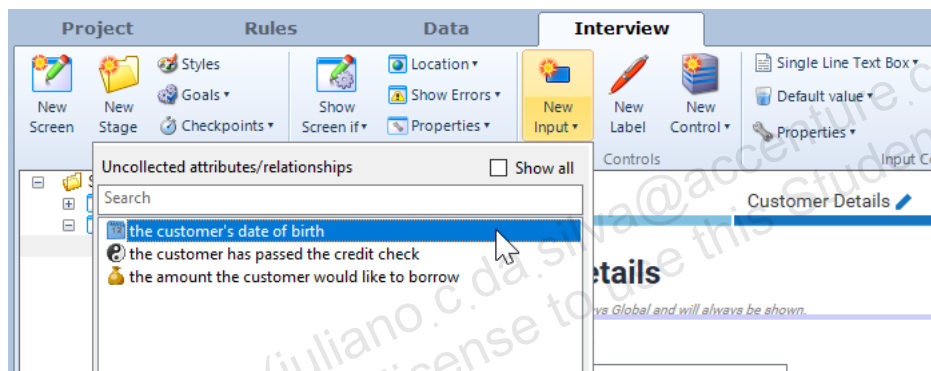
5. Type “Customer Details” to give this screen a new title.



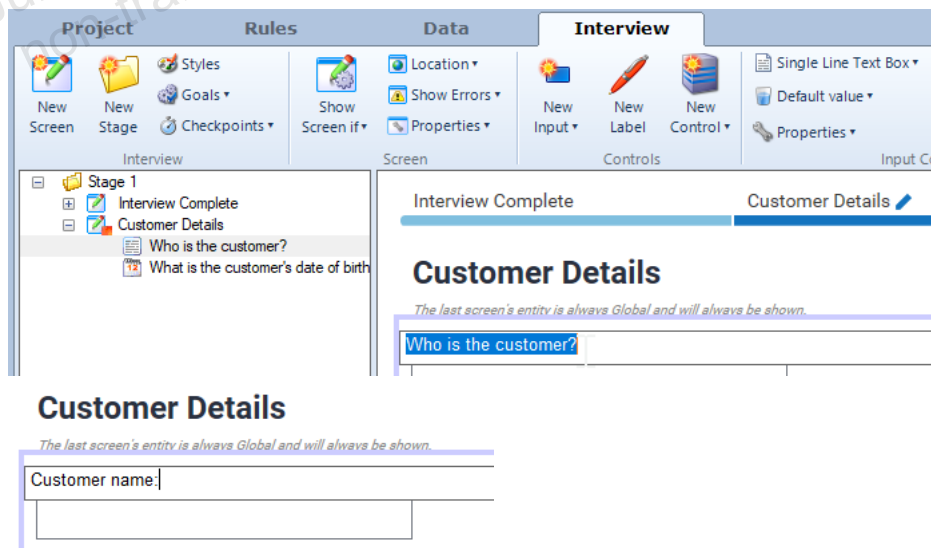
- To collect the attribute “the customer,” click **New Input** and select “the customer” from the pop-up window.



- To collect the attribute “the customer’s date of birth,” click **New Input** and select “the customer’s date of birth” from the pop-up window.




- To change the question for “the customer,” click the “the customer” within the input control and type “Customer name.”




9. To change the question for “the customer’s date of birth,” click the question within the input control and type “Date of birth:”

Date of birth:


Collects attribute *the customer's date of birth*.

10. To change the input type for “the customer’s date of birth,” click the “Date of Birth” control. A blue box will appear around the control.

Interview Complete Customer Details 


Customer Details

The last screen's entity is always *Global* and will always be shown.

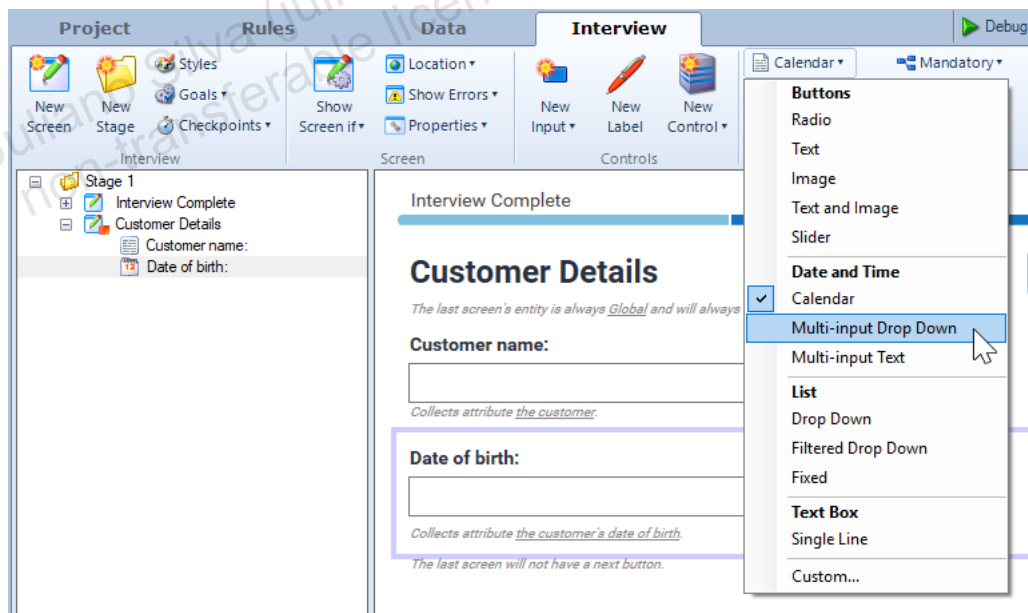
Customer name:

Collects attribute *the customer*.

Date of birth:


Collects attribute *the customer's date of birth*.
The last screen will not have a next button.

11. Click the **Text Box** drop-down list and select **Multi-input Drop Down**.



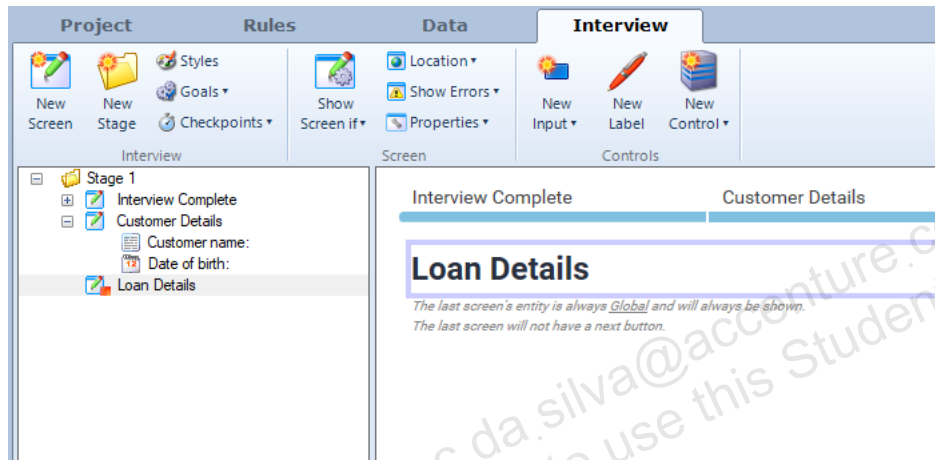
The screenshot shows the Oracle Interview Builder interface. The 'Interview' tab is active, and the 'Date of birth' control is selected in the 'Screen' pane. The 'Text Box' dropdown menu is open, and the 'Multi-input Drop Down' option is highlighted. The 'Date of birth' control is highlighted with a blue box in the 'Screen' pane.

Date of birth:

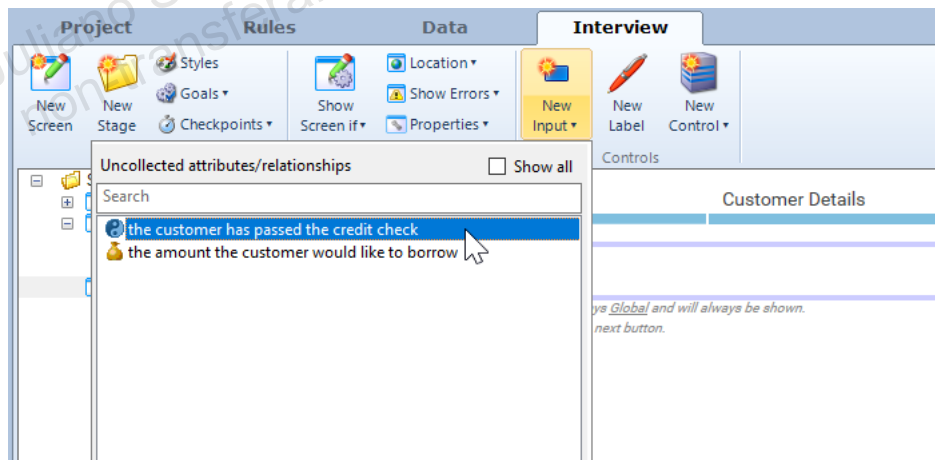
mm dd yyyy

Collects attribute the customer's date of birth. Year selection is relative to the current year which starts at 2019 and ends at 2019.
The last screen will not have a next button.

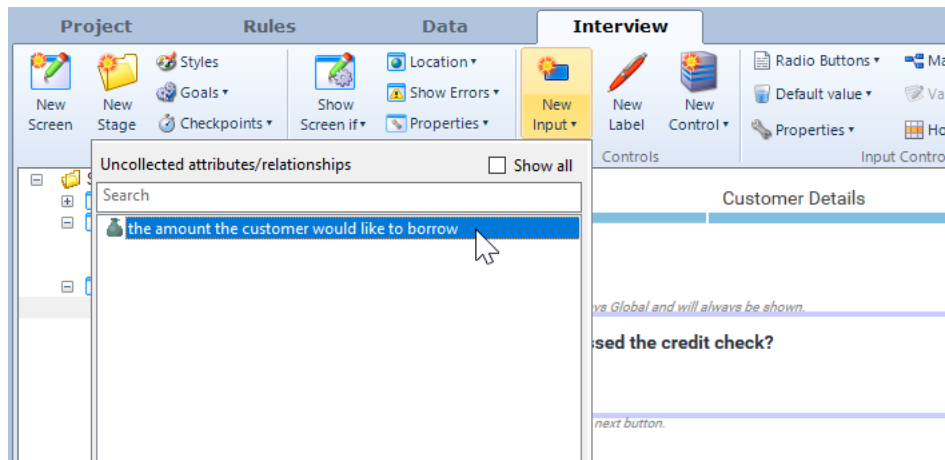
12. To create a new screen called "Loan Details":
 - a. Click **New Screen** to create a new screen.
 - b. Click the title "New Screen" in the right pane and type "Loan Details" to change the title of the screen.



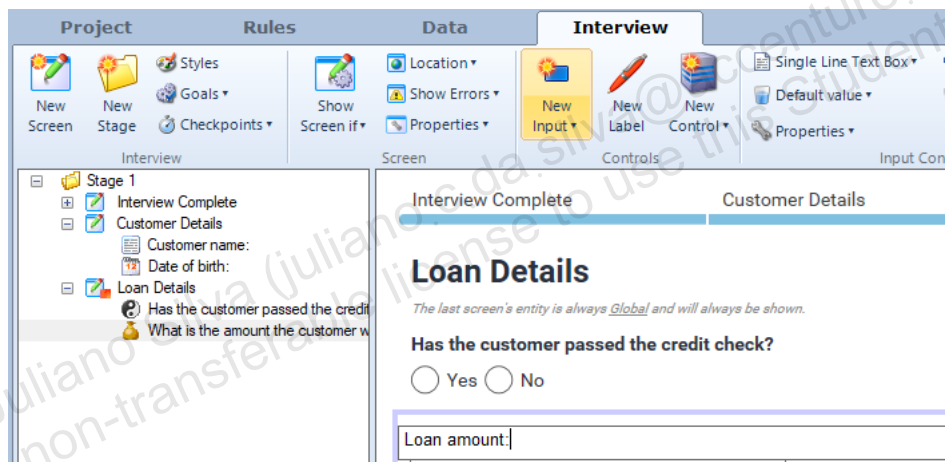
13. To collect the attribute "the customer has passed the credit check," click new input and select "the customer has passed the credit check" from the pop-up window.



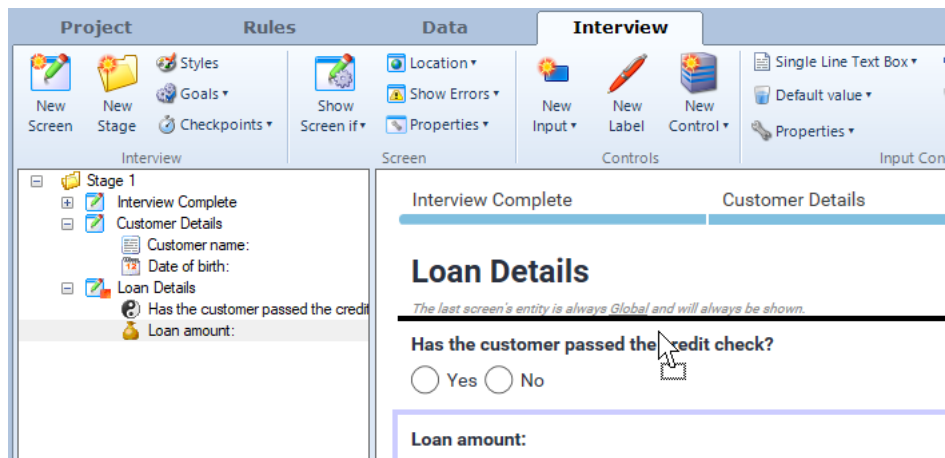
14. To collect the attribute “the amount the customer would like to borrow,” click new input and select “the amount the customer would like to borrow” from the pop-up window.



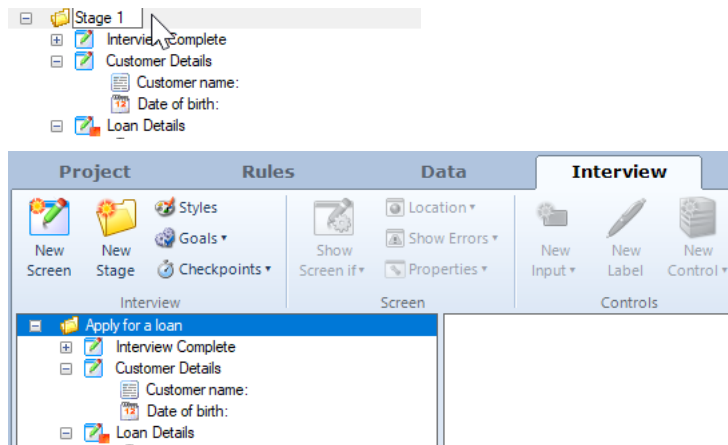
15. To change the question for “the amount the customer would like to borrow,” click that question and type “Loan amount:”



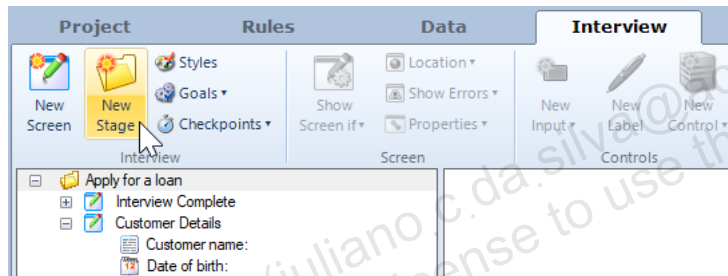
16. To ensure the “Loan amount:” appears first on the screen, drag and drop the input control immediately below the screen title.



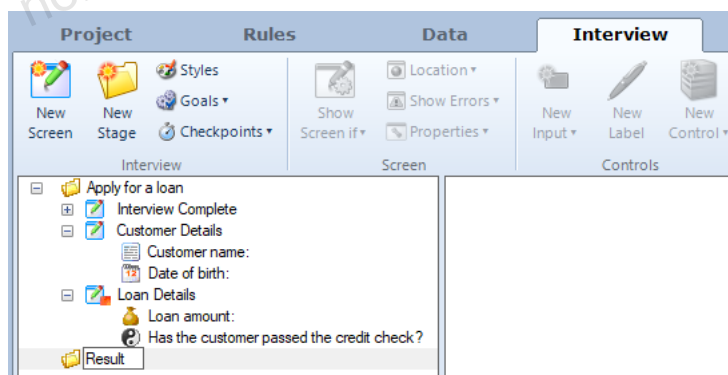
17. To rename the first stage, click “Stage 1” next to the folder in the left pane and type “Apply for a loan.”



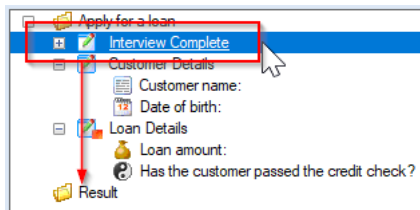
18. To add a new stage, click **New Stage**.



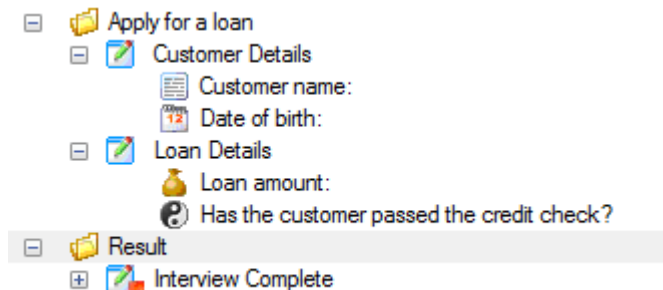
19. To rename the new stage, click “Stage 2” next to the folder in the left pane and type “Result.”



20. To ensure the “Interview Complete” screen appears in the “Result” stage, drag-and-drop the Interview Complete screen into the Result stage.

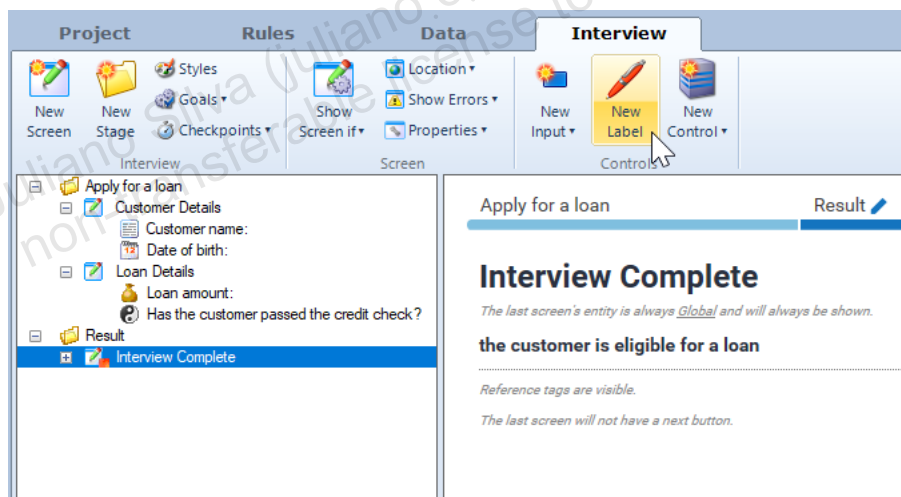


21. Expand the “Result” stage by clicking the “+” next to the stage to verify that the “Interview Complete” screen is now within the stage.

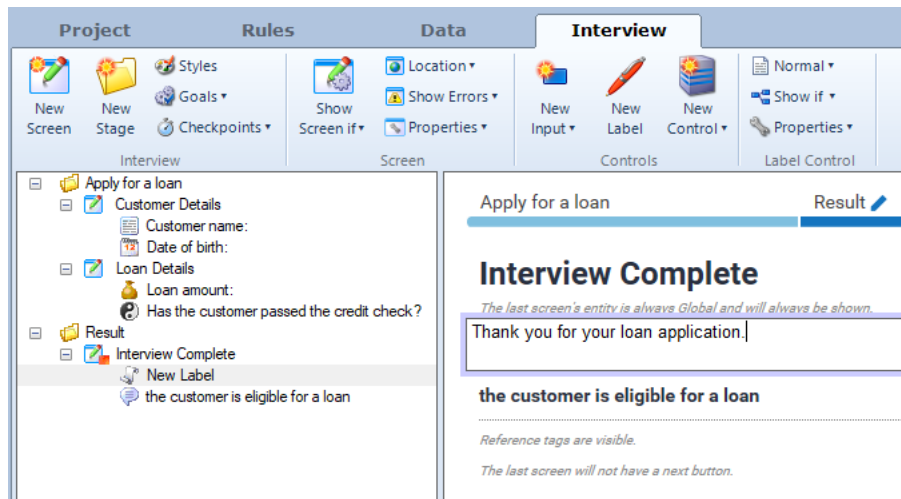


22. Select the Interview Complete screen in the left pane.

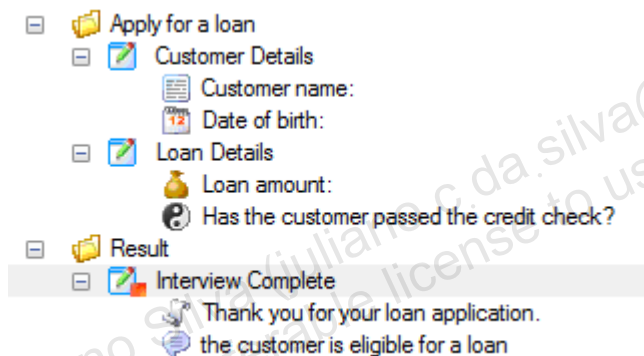
23. To add a label to the screen, click **New Label**.



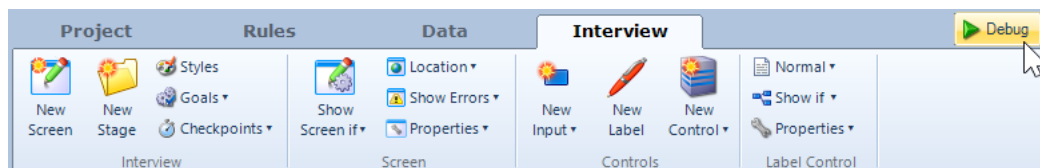
24. To change the text of the label, click the label in the right pane and type the text “Thank you for your loan application.”

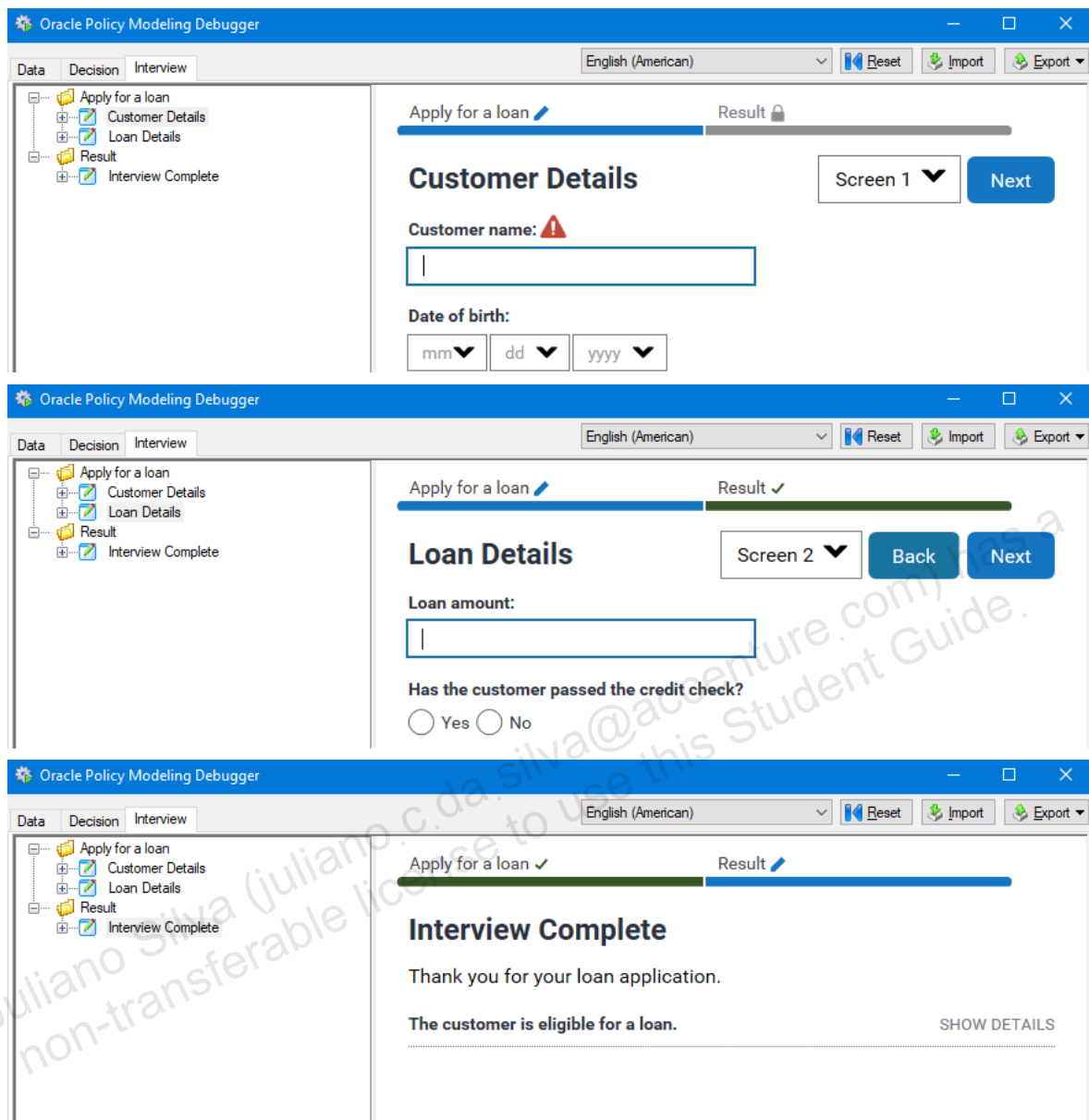


25. You have successfully completed this practice if your Interview tab looks like this:



26. Click the **Debug** button to test your screens and verify that each screen appears exactly as shown. Note that you will need to respond to each question and click the Next button to proceed to the next screen.





NOTE: The explanation on this final screen will vary based on the answers provided.

Juliano Silva (juliano.c.da.silva@accenture.com) has a
non-transferable license to use this Student Guide.