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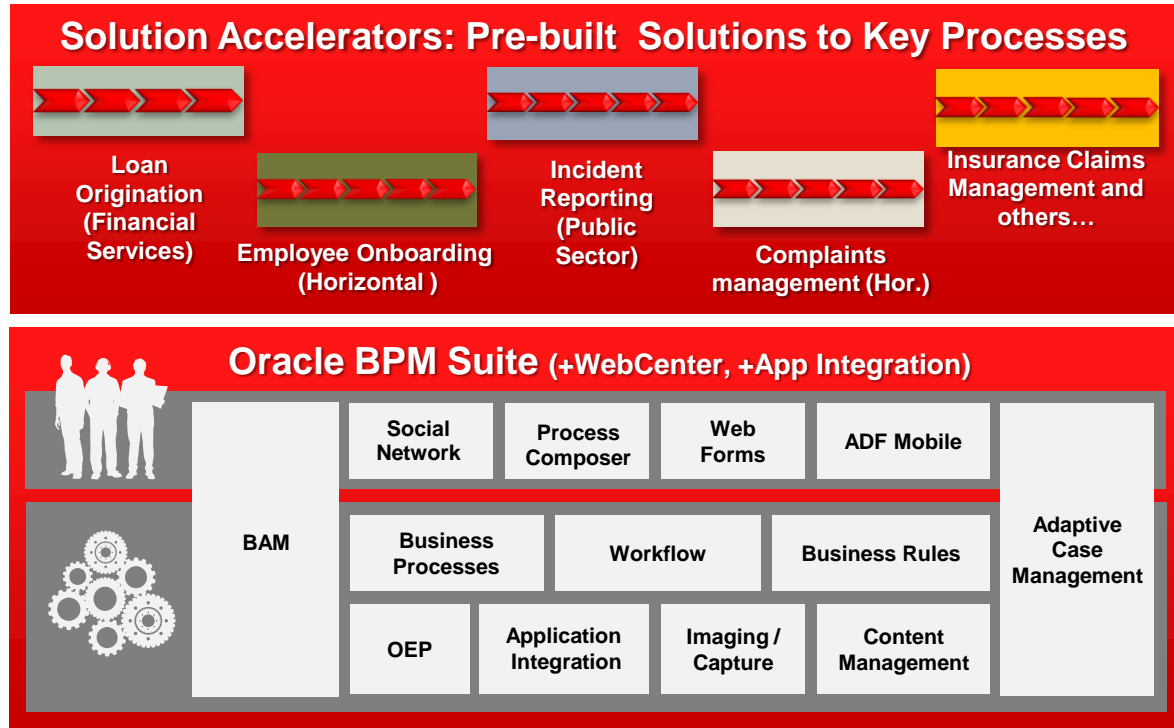
# Oracle Solution Accelerators Overview

11.1.1.7.2 Release



# What are Oracle Solution Accelerators?

Oracle's pre-built BPM and WebCenter Content solutions



# Why Solution Accelerators?

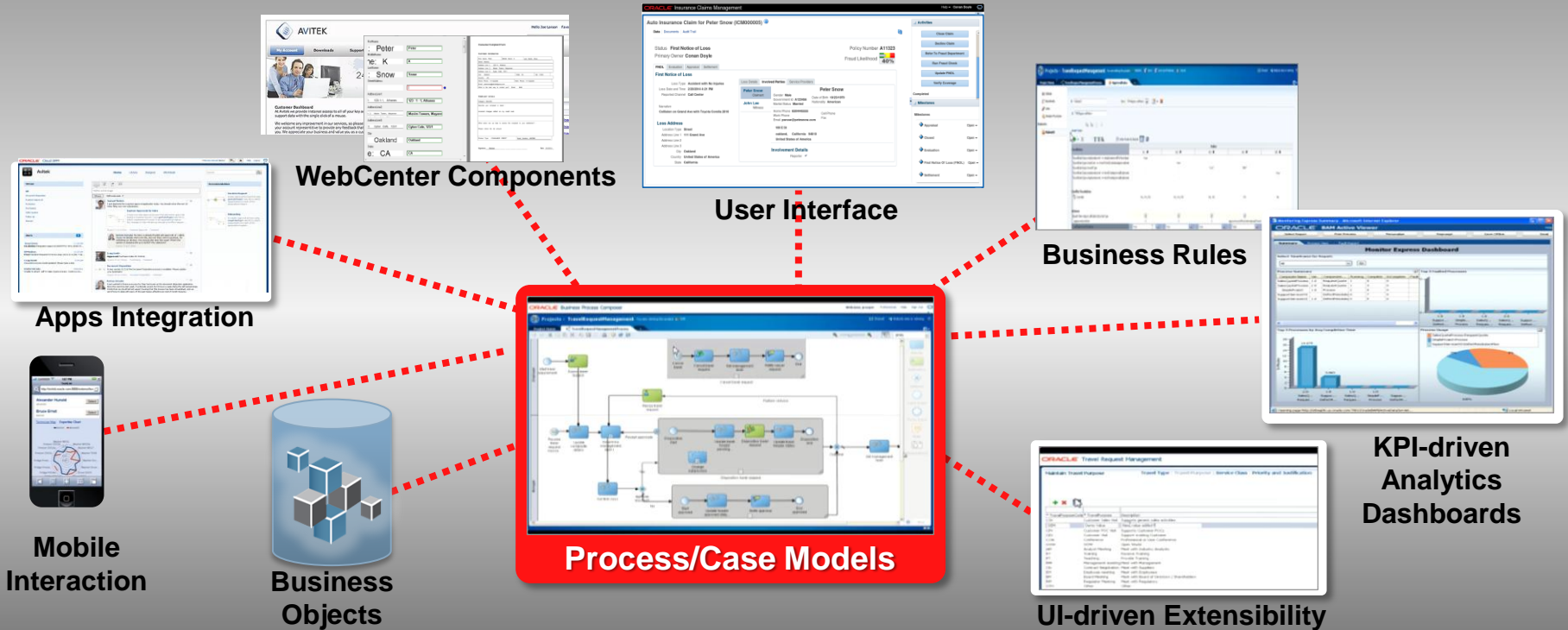
## Enable a Business-centric BPM(+) Solution Model

- Demonstrate the value of BPM+ to Business
- Accelerate BPM+ value delivery
- Deliver quality solutions for core Industry processes
- Deliver industry-specific solutions to cover “white space” among Packaged Applications
- Deliver best practices to empower IT and Business



# Solution Accelerators: Inside the Box

All Product Quality Components for a Complete OOB Solution



# The Best of Both Worlds

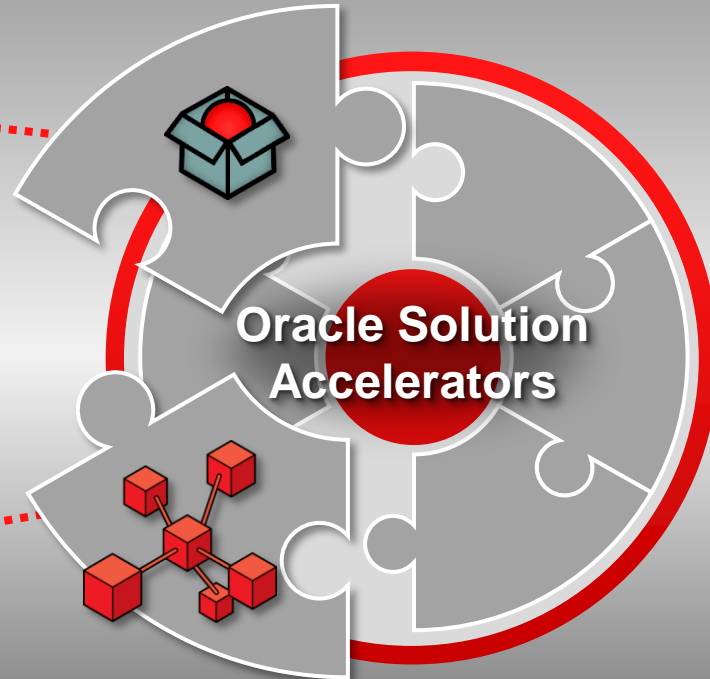
## Applying a Application Model to BPM Solutions

### Apps Model Advantage:

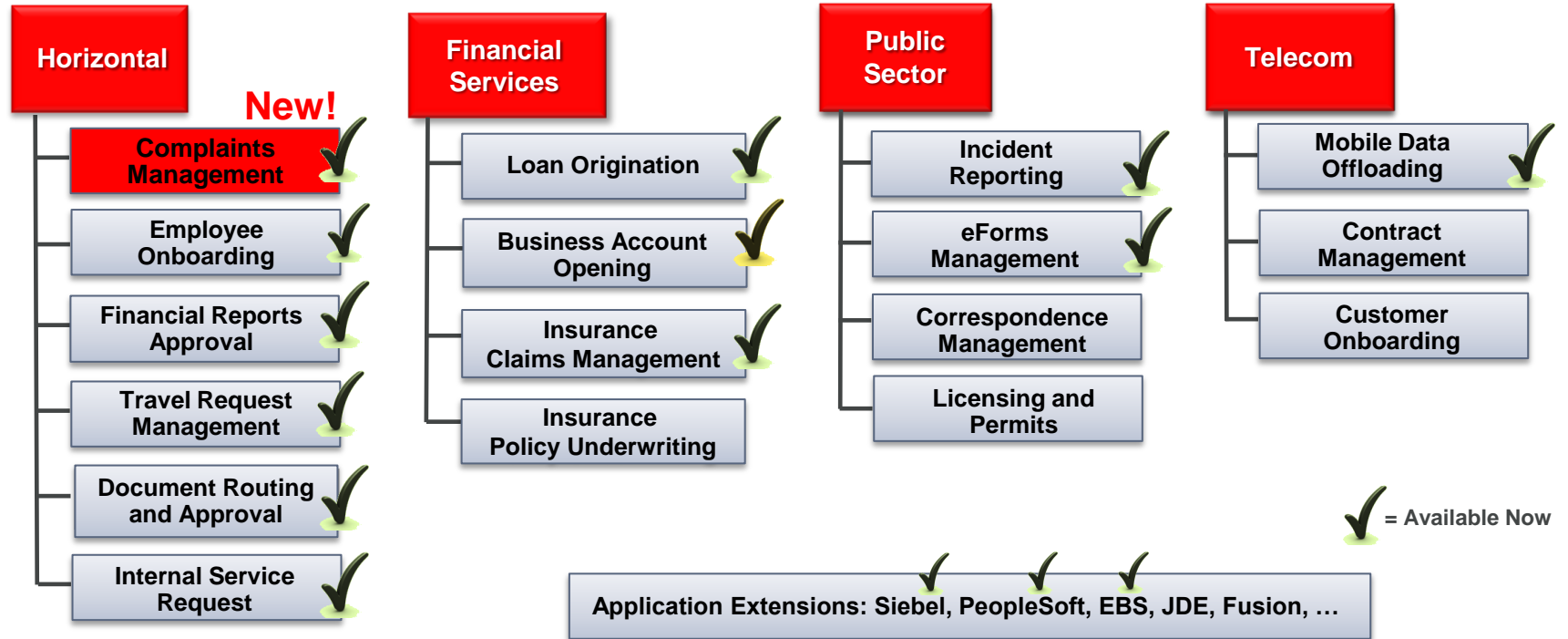
Ability to see solution and understand how to configure to better fit needs

### BPM Model Advantage:

Build any solution you need to support your business processes



# Oracle Solution Accelerators





# Complaints Management: Challenges

- **Unsatisfactory Customer Experience**

- Inconsistent, non-personalized, channel-specific process
- Poor process predictability – SLAs can't be guaranteed



- **Regulatory Challenges**

- Process can't support knowledge workers
- Cannot adapt to changing regulatory requirements



- **High Operational Costs**

- Inefficient process with multiple manual steps and work handoffs
- Poor document management and extensive use of paper



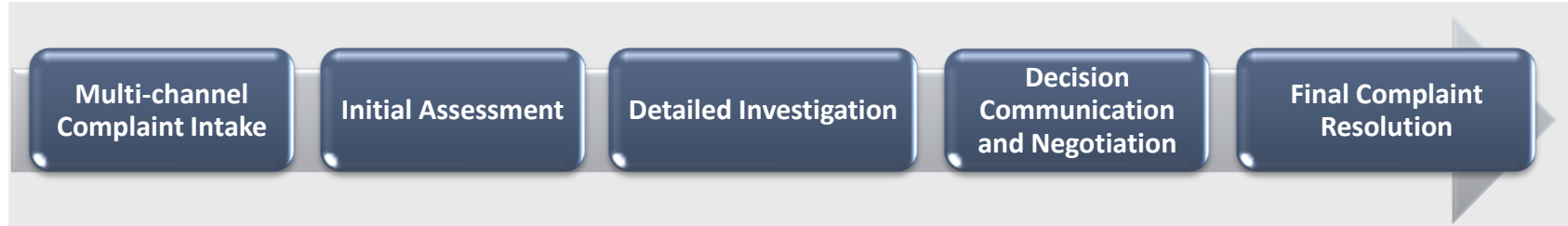
- **Low Visibility into Process Execution**

- Process participants have limited insight into the process
- Exception management is manual and load sharing is ad-hoc



# NEW in 7.2: Complaints Management Accelerator

## Business Process Overview



**BPM and Adaptive Case Management (ACM) driven solution to deliver an effective and efficient customer complaints resolution process**

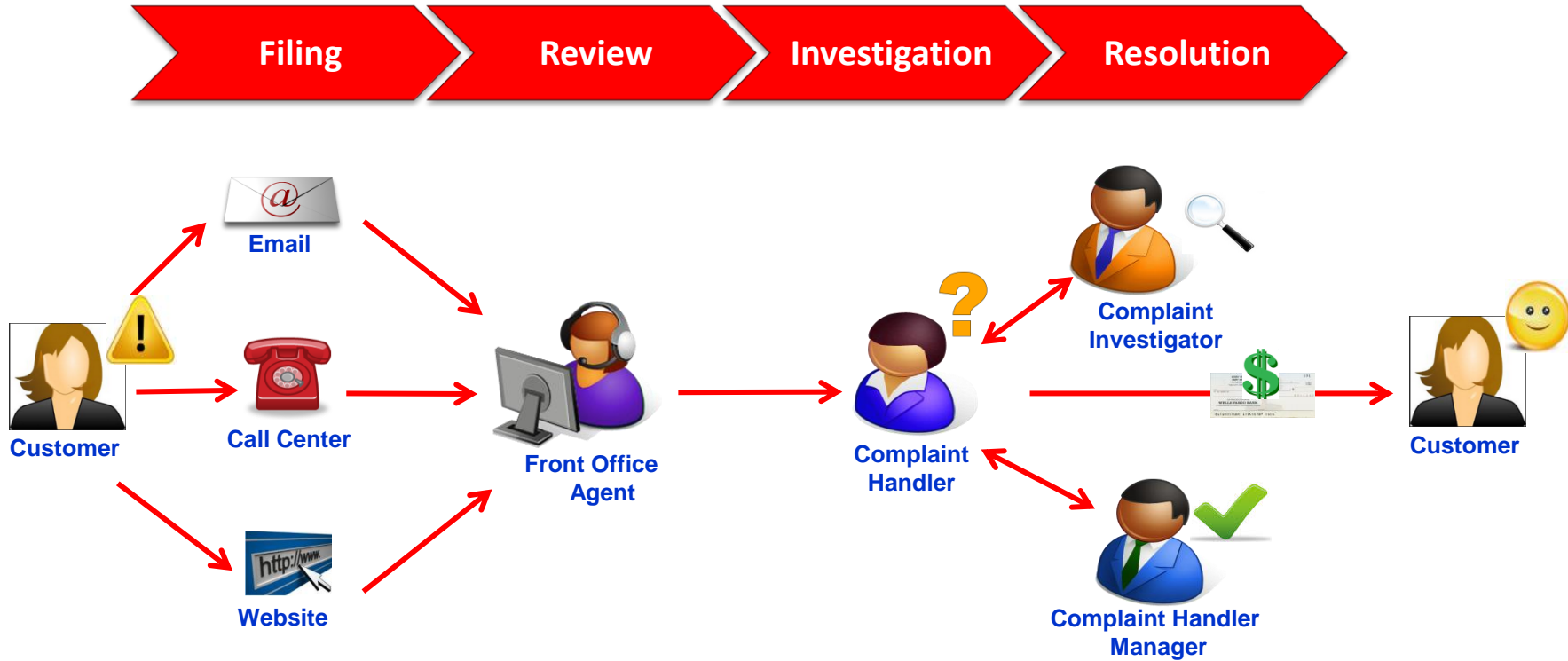
### Strategic Goals

- Enable meaningful customer interaction
- Reduce operational costs
- Enhance customer satisfaction
- Be more competitive in the marketplace
- Reduce customer churn

### Process Advantages

- Faster complaint resolution times
- Meet regulatory compliance requirements
- Provide agility, visibility, and audit capabilities
- Reduce use of paper based documents
- Enhanced customer experience for complainants

# Effective Complaints Management



# Complaints Management: CSR files Complaint

**ORACLE** Complaints Management Help

**Complaints Management**  
Manage Complaints  
File Complaint

**File Complaint**

Cell Phone **650-444-3333**  
Email **petersnow@abcdefgcorp.com**  
Address **111 E Street Redwood Shores California United States of America 27892**

**Complaint Information**

\* Summary   
\* Category  Type  Detail   
\* Narrative   
Customer Expectation

**Additional Information**

Unjustified Amount   
Additional Text

**Case Information**

\* Severity  \* Priority   
Notify By  Email  Phone \* Channel

**Reference Information**

Product Category  Product SubType  Product Name   
Product Type  Product Code  Asset Identifier  Select asset identifier

☰ [ 118 ] Complaint # CM000065 by Peter Snow ⓘ

Add Comment Raise Event

Activities 

Audit Trail | Data | Documents

Available

- EmailActivity
- SimpleWorkflowActivity
- Investigate Complaint
- Maintain Involved Parties  
This activity was completed
- Close Complaint

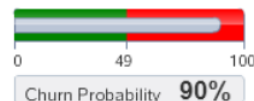
Completed

- Maintain Involved Parties  
Completed 1 minute ago
- Initialize New Complaint  
Completed 41 minutes ago

Complaint Information Summary

Status **Investigation**  
Sub Status **Initiated**

Owner **cdickens2**  
Decision **Pending**

Complainant | **Complaint** | StatusComplaint  Details 

## Customer Information

First Name **Peter**  
Last Name **Snow**  
Cell Phone **650-444-3333**  
Email **petersnow@abcdefgcorp.com**  
Address **111 E Street California United States of America 27892**

## Complaint Information

Summary **Incorrect interest rate charged on credit card**  
Category **Billing** Type **Unjustified Charge** Detail **Interest Rate**  
Narrative **Customer claims to have applied for credit card based on a 0% APR promotion. Yet an APR of 19.9% was charged for 8 months**  
Customer Expectation **Excess amount charged should be refunded. Customer wants to cancel card**

Milestones

## Complaint Filed

Completed 12 minutes ago by workflow:  
Complaint successfully filed

## Initial Assessment Completed

Completed 7 minutes ago by workflows:  
Initial assessment of complaint complet

## Investigation Initiated

Completed 3 minutes ago by workflows:  
Investigation Initiated

## Investigation Completed

## Resolution Initiated

Load

Stakeholders

Complaints Handler

rsteven2

Complaints Handler Manager

Complaints Investigator

cdickens2

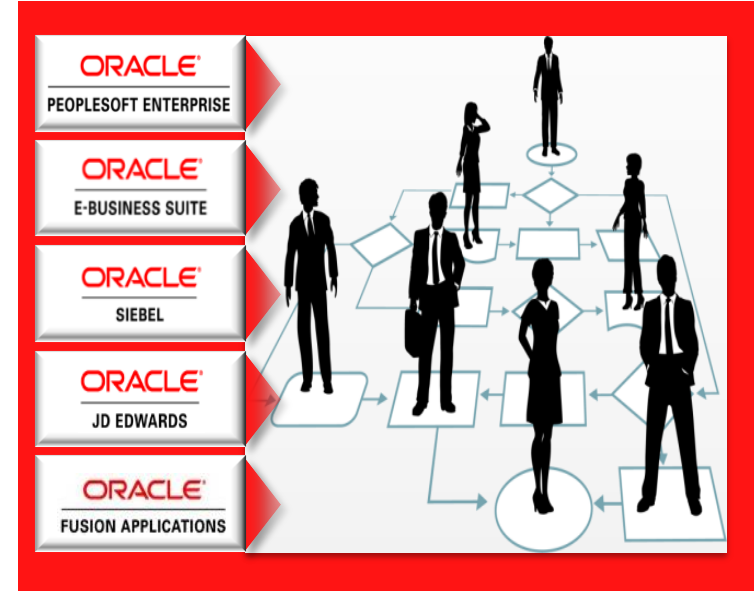
Front Office Agent

ComplaintsManagement FrontOf

# Want To Do More With Applications?

## Smart Extensibility with Oracle Solution Accelerators

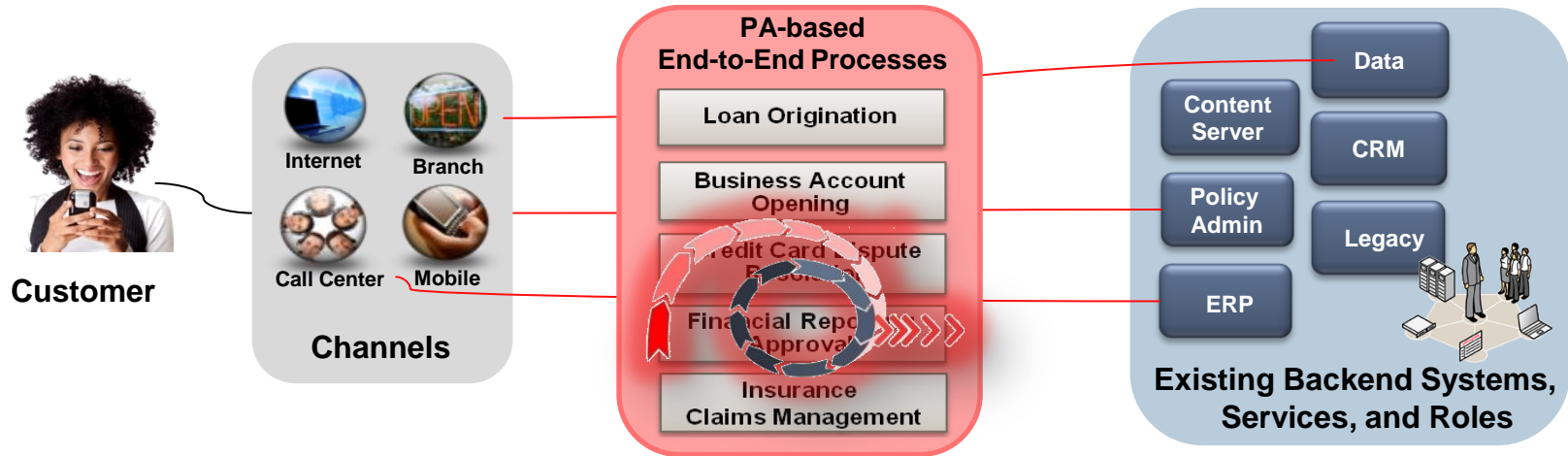
- Support your end-to-end processes by covering “white space” between Apps
- Eliminate the need of brittle customizations
- Enhance end-to-end business process management across apps
- Improve user experience



# Value: Deliver Better Services to your Customers

## Deliver customer excellence with great end-to-end processes

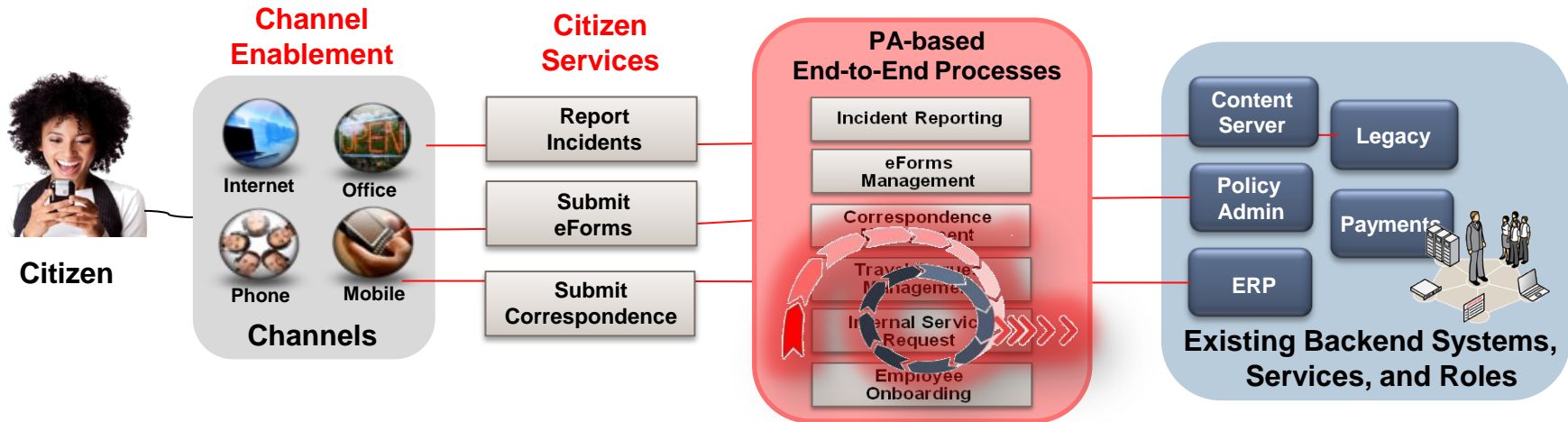
- **End-to-end processes** that start and end with the Customer
- **Coordination across functional silos:** aligned resources, services
- **Built in real-time** visibility and **ability to act** on tasks



# Value: Deliver Additional Services to Citizens

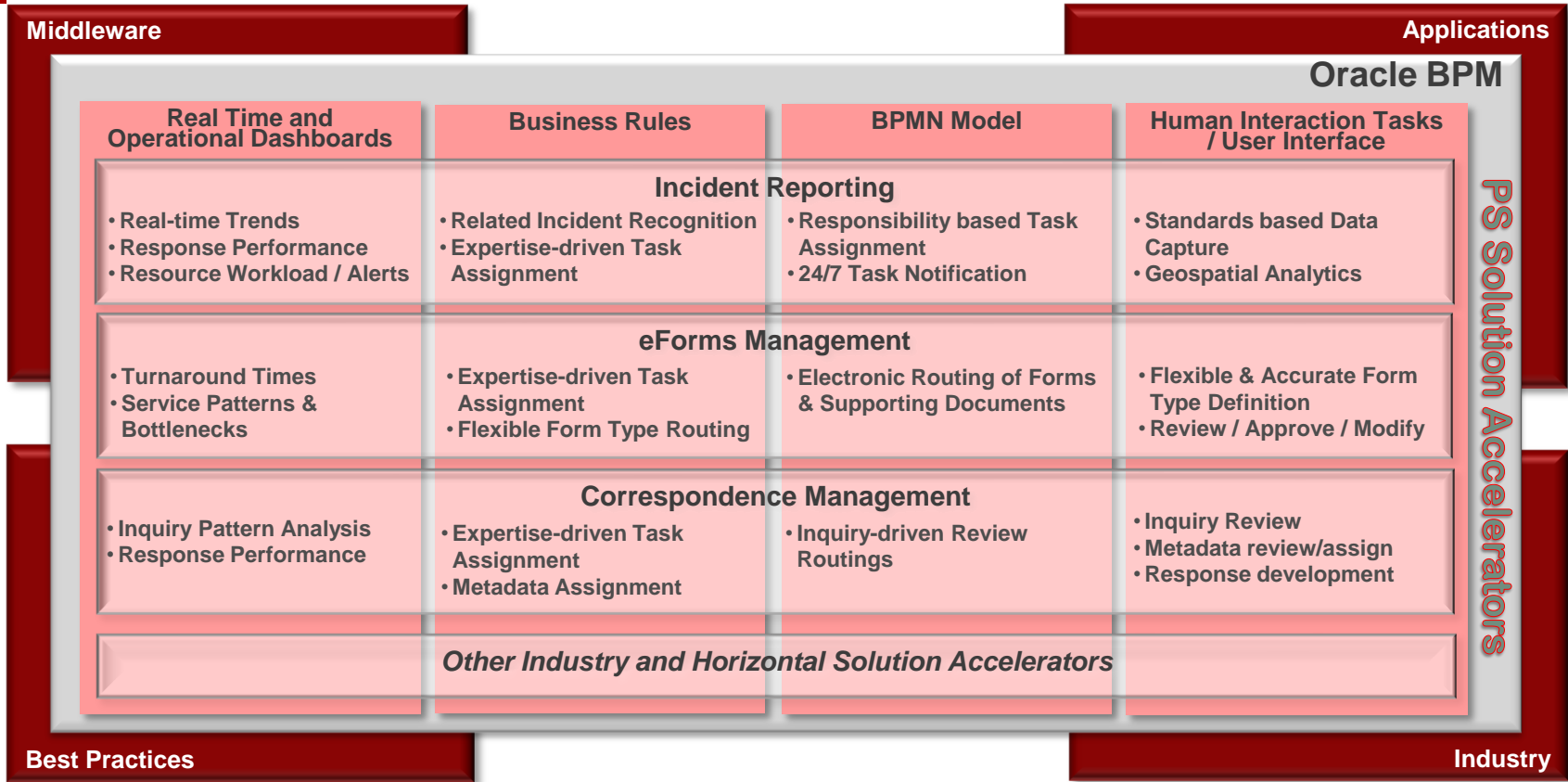
## Deliver service excellence with great end-to-end processes

- **End-to-end processes** that start and end with the Citizen
- **Coordination across functional silos:** aligned resources, services
- **Built in real-time** visibility and **ability to act** on tasks

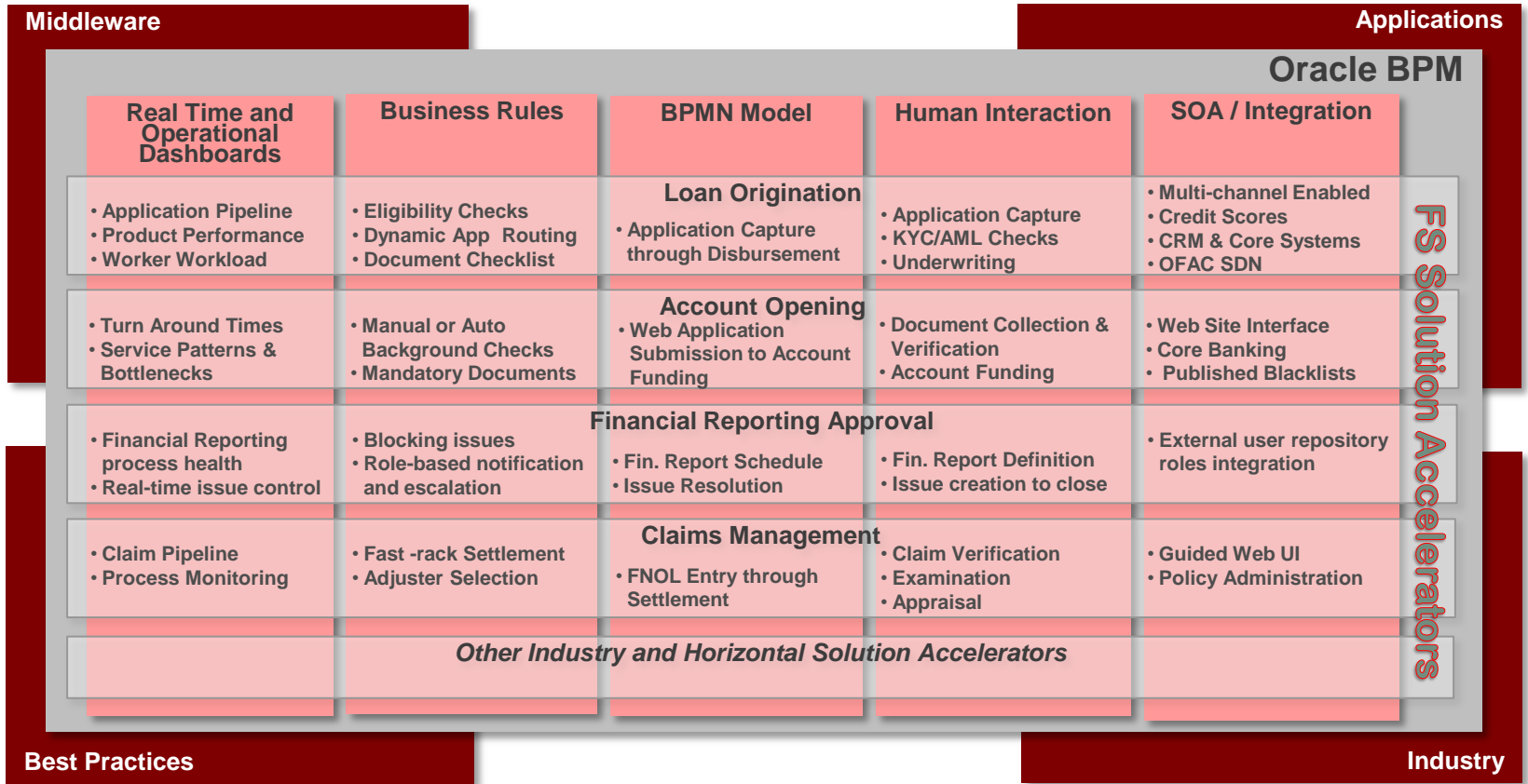




# Citizen Services Delivery: Solution Map



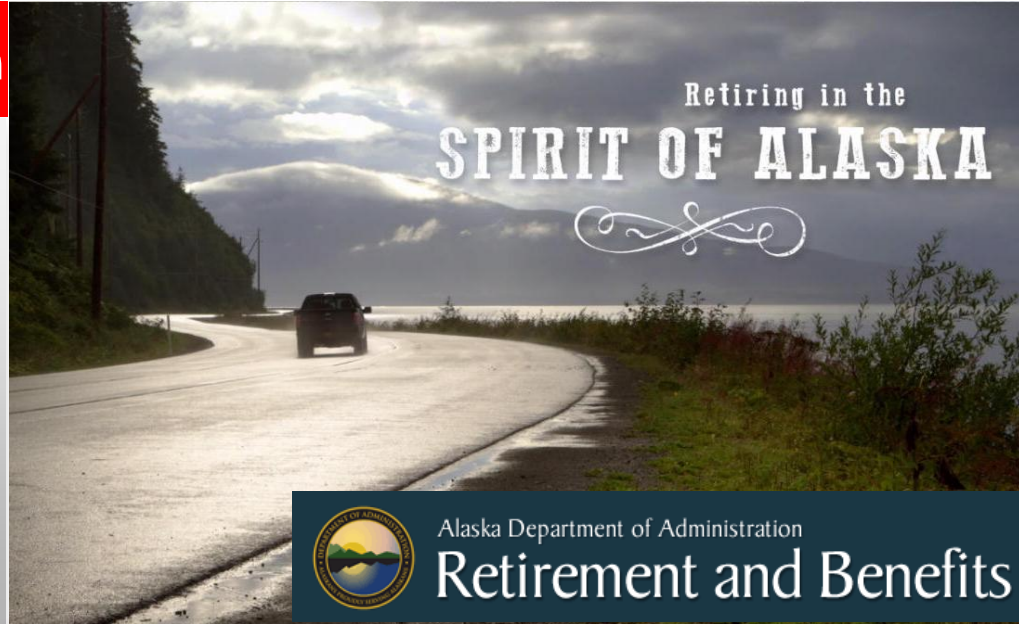
# Customer Services Execution: Solution Map



# Customer Case Study – Alaska DRB

## Six Sigma Process Automation

- Think Big (Six Sigma) → Prioritize processes → Automate with BPM
- Investment in Employee Onboarding accelerator as first BPM solution
- Targeted Benefits Verification process: automated with BPM, collected documents in WebCenter Content



<http://story.us.oracle.com/alaska.jsp>

# Customer Case Study – AsiaCredit Bank

## Competing with Speed

- Efficiently utilizing time and resources when innovating loan origination process
- Using Loan Origination accelerator to speed up solution deployment
- BPM to track, WebCenter Content to store
- Gaining competitive advantage by responding to customer needs faster



# Process Excellence: San Joaquin County

## 2013 Gartner BPM Excellence Award Winner



### Business Mandate:

Deliver better Citizen services with less resources

### BPM Program Success Factors

- BPM CoE with IT, Business Analysts, Operational Experts
- Enable BPM with agile approach
- PA Investment: Travel Request Management first, eForms Management to follow

### The Results

- Improved Integrated Justice Information System

*“We are investing time and effort in Solution Accelerators to reuse best practices and implement them within the County, thereby taking the advantage of a shorter turnaround time [...] and accelerate delivery of solutions to our customers”*

- Shakir Awan, IS Project Manager

# A New Level of Maturity for BPM Initiatives

## Process Excellence Components

**Process  
Excellence**

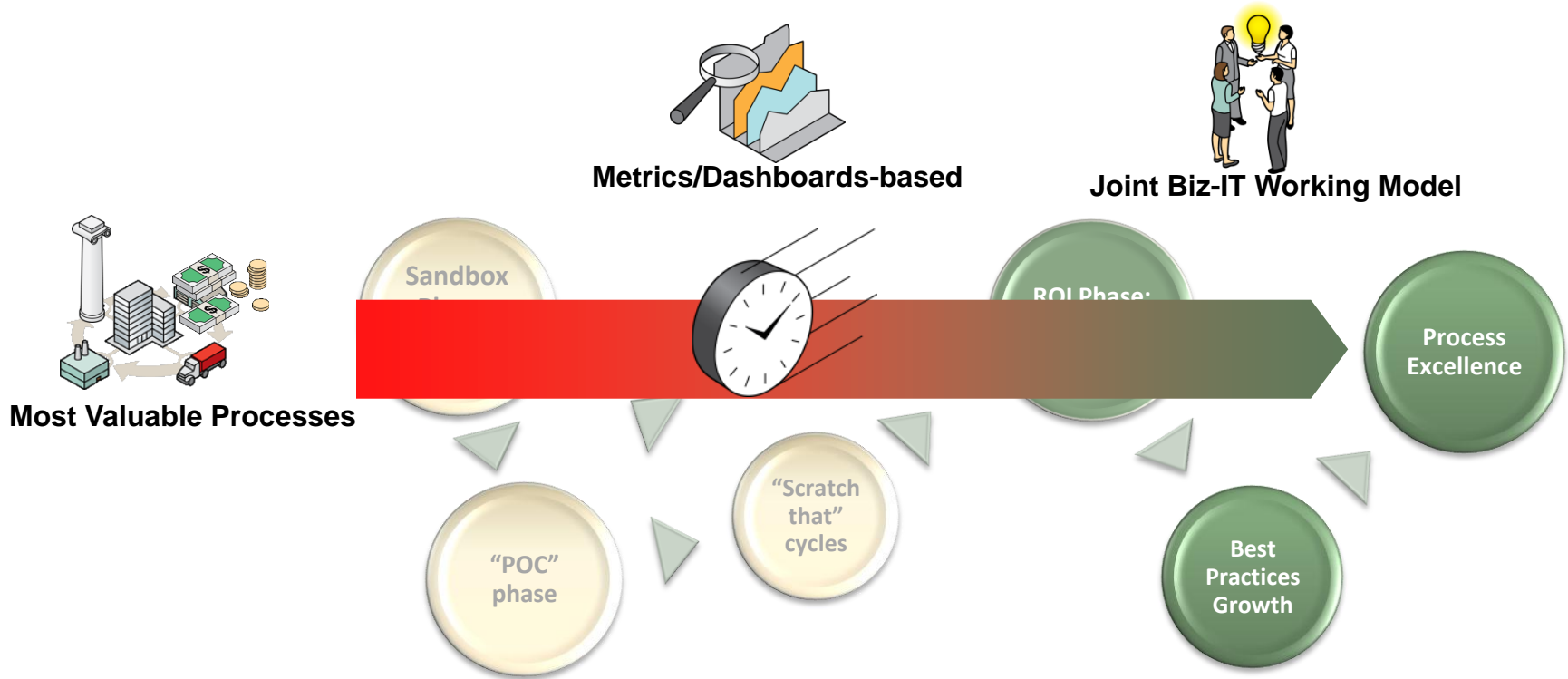
Business:  
Master Value  
Generation

IT: Master BPM  
Delivery Model

Apps Integration:  
Smart Extensibility  
of OOB Processes

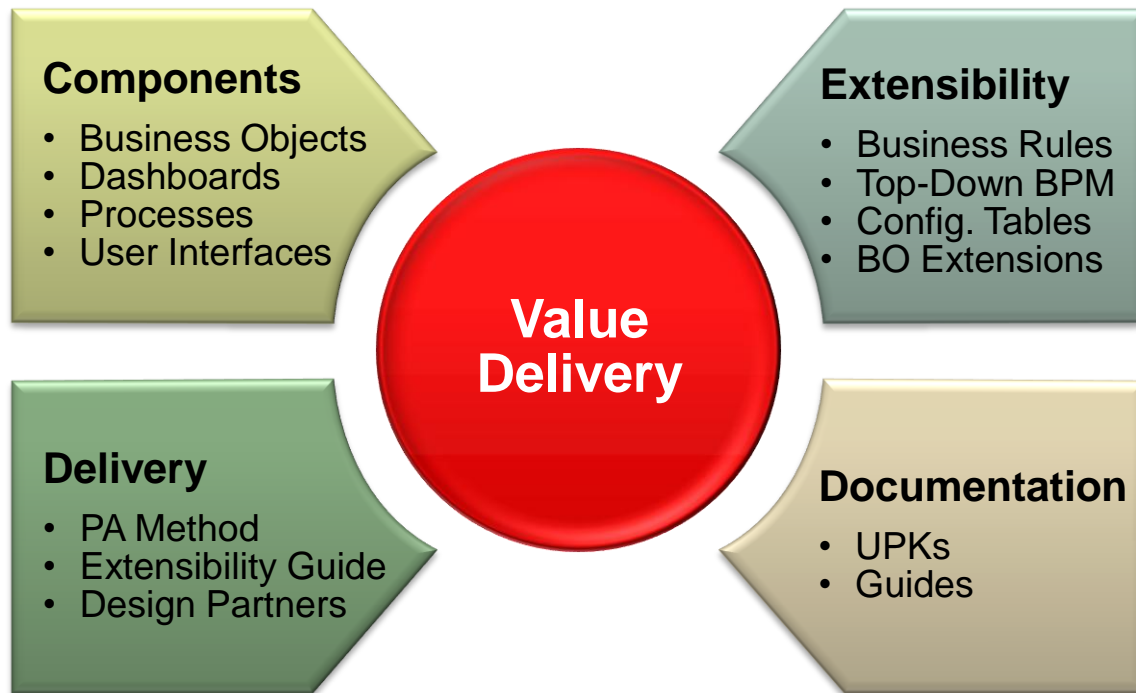
# Solution Accelerators: Fast Path to Excellence

*Leading Edge Without the Bleeding Edge*



# Solution Accelerator Patterns

## Value Delivery with Best Practices / Patterns





# Accelerators: Oracle Industry + Apps Expertise

- Richness of BPM and WebCenter Suites with Apps integration
- Oracle Industry process expertise
- Production-strength solutions
- Framework with full spectrum of components
- Execute quickly against vertical and horizontal solutions



# Summary of Key Accelerators

## Business Benefits

- Employee Onboarding: faster time to productivity, OOB integration
- Complaints Management: increase customer loyalty, comply with regulations
- Other industry processes: process efficiency and control, document mgt

## Key Capabilities

- Out-of-the box solutions with full fledged process management, Case Management, documents, and imaging functionality for quick extensibility
- End-to-end process coverage and process control with real-time dashboards
- Pre-integrated with EBS, PeopleSoft, Siebel (other systems in the future)
- Reduced implementation time and risk

# Key Needs Assessment Questions

- **Employee Onboarding:** How long does it take to make a new employee productive? Do you have a documented process for employee onboarding? Is it manually controlled?
- **Complaints Management:** is improving the ability of your organization to respond to complaints important for customer loyalty and/or for complying with regulations? Are you able to monitor your complaints in real-time as well as report on all complaint data, meet regulatory requirements and avoid lawsuits?
- **Other PA-covered processes:** Do you need to improve process execution time? Do you need to control process with real-time analytics, performance monitoring and audit capabilities? Cut down cost of labor and use of paper –based documents? Provide a consistent, personalized customer experience?

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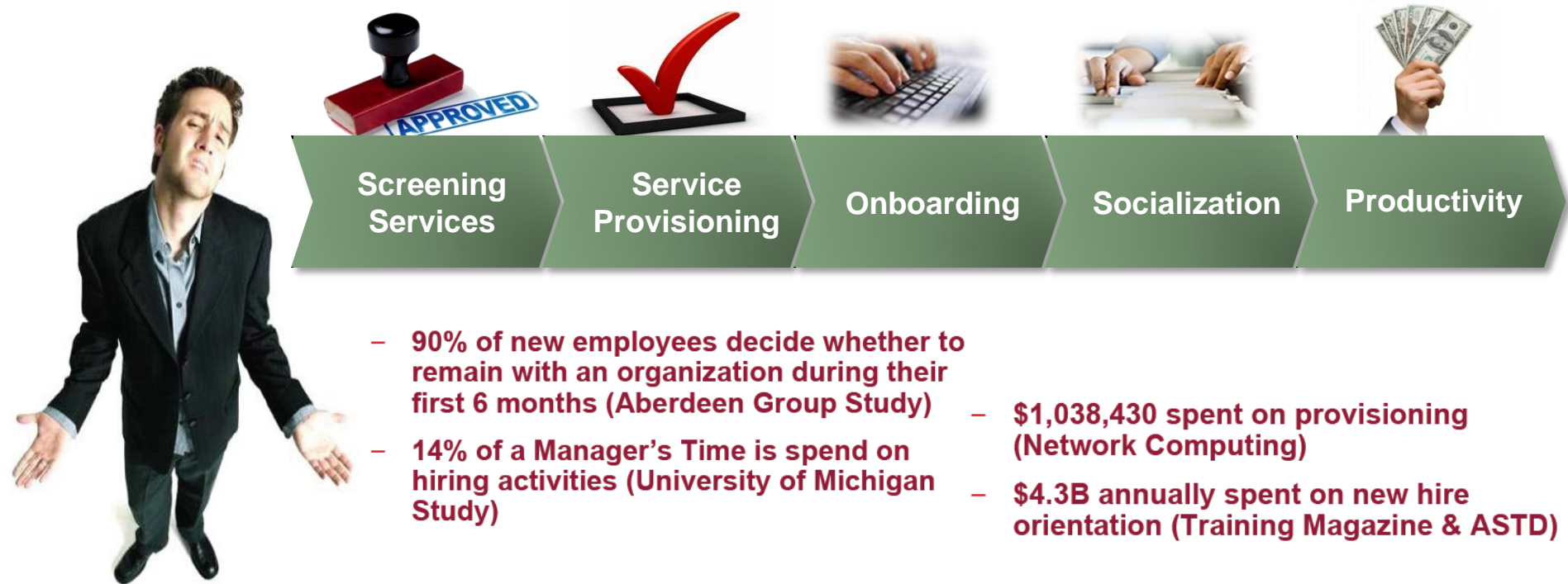
# Solution Accelerators

Description



# The Typical Onboarding Process

The high costs of manual, ad-hoc employee onboarding



# Employee Onboarding Accelerator

## Business Process Overview



**Automated solution for the Employee Onboarding process, including background checks and provisioning of resources.**

### Strategic Goals

- Support high morale of new employee
- Auditable provisioning
- Reduce administrative costs
- Standardize process across the organization
- Improve productivity

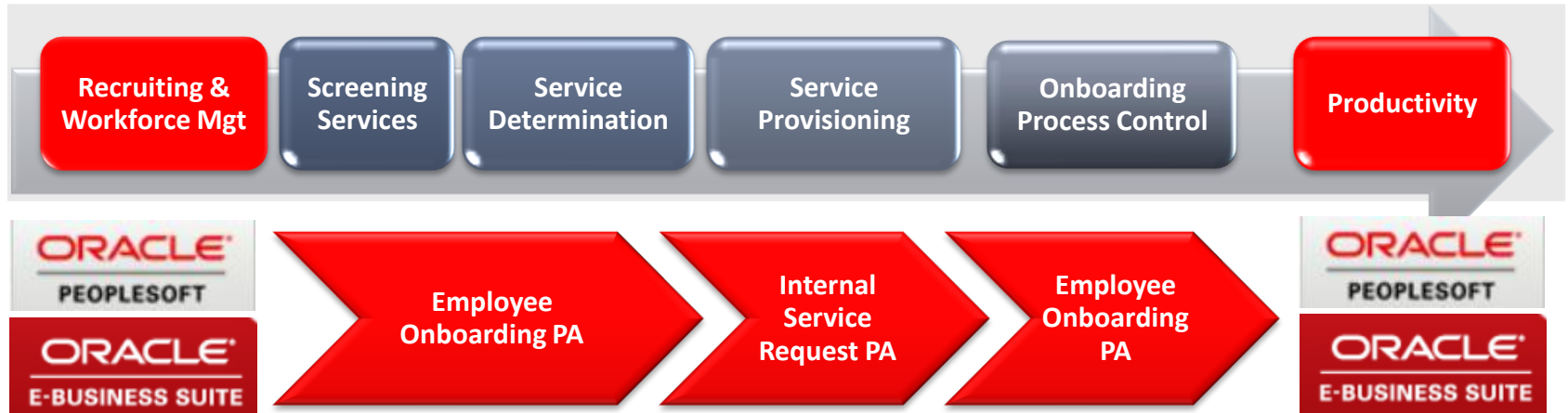
### Process Advantages

- Timely execution of provisioning requirements
- Individual Status Reports & automated warnings
- Reduce use of paper based documents
- Provide agility, visibility, and audit capabilities

# Application Extension with Solution Accelerators

## Extend PeopleSoft or EBS with Employee Onboarding

- Extend process from hire to productivity – or enable even without apps
- Provision all services that employees need, report back to PS and EBS
- Follow standard process to configure for specific Customer

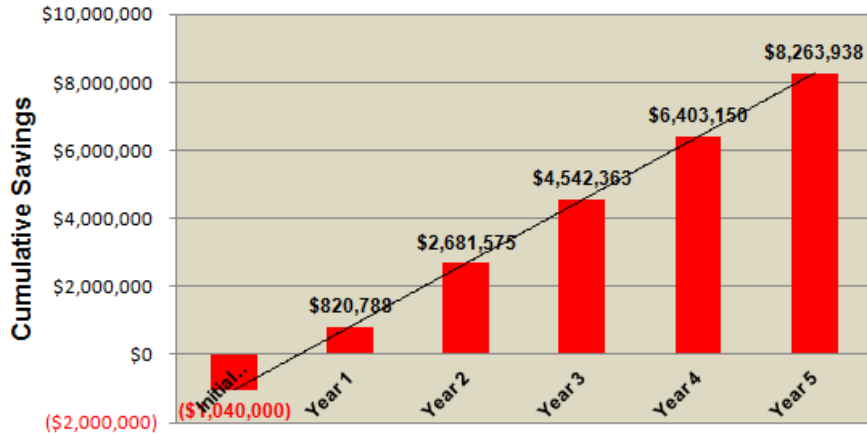


# Employee Onboarding

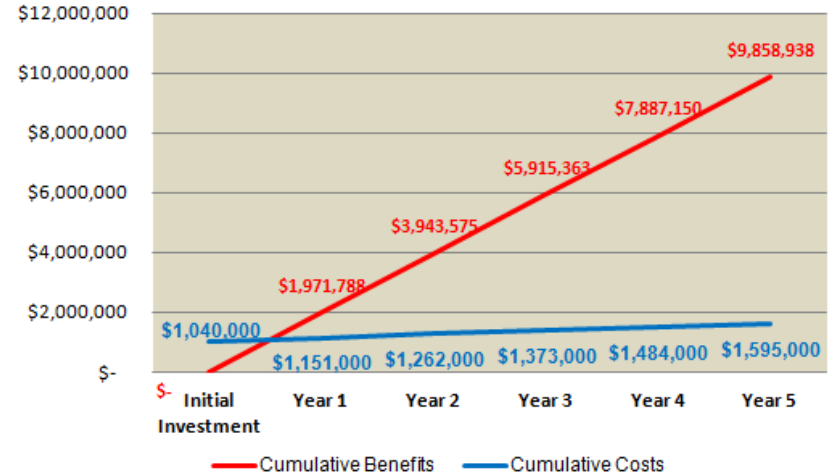
## Rapid Business Case: Payback Analysis

Cost & Benefit Summary						
Benefits	Year 1	Year 2	Year 3	Year 4	Year 5	Total
<b>Employee Productivity</b>						
New Employee Time	\$ 1,620,000	\$ 1,620,000	\$ 1,620,000	\$ 1,620,000	\$ 1,620,000	\$ 8,100,000
HR Administration	\$ 129,600	\$ 129,600	\$ 129,600	\$ 129,600	\$ 129,600	\$ 648,000
<b>Operational Efficiency</b>						
Paper Document Management	\$ 222,188	\$ 222,188	\$ 222,188	\$ 222,188	\$ 222,188	\$ 1,110,938
<b>Annual Potential Benefits</b>	<b>\$ 1,971,788</b>	<b>\$ 1,971,788</b>	<b>\$ 1,971,788</b>	<b>\$ 1,971,788</b>	<b>\$ 1,971,788</b>	<b>\$ 9,858,938</b>
Benefit Realization Rate	100%	100%	100%	100%	100%	
<b>Annual Benefits</b>	\$ -	\$ 1,971,788	\$ 1,971,788	\$ 1,971,788	\$ 1,971,788	\$ 1,971,788
<b>Cumulative Benefits</b>	\$ -	\$ 1,971,788	\$ 3,943,575	\$ 5,915,363	\$ 7,887,150	\$ 9,858,938
<b>Net Present Value of Benefits</b>	\$ 8,305,886					

**Payback Analysis**



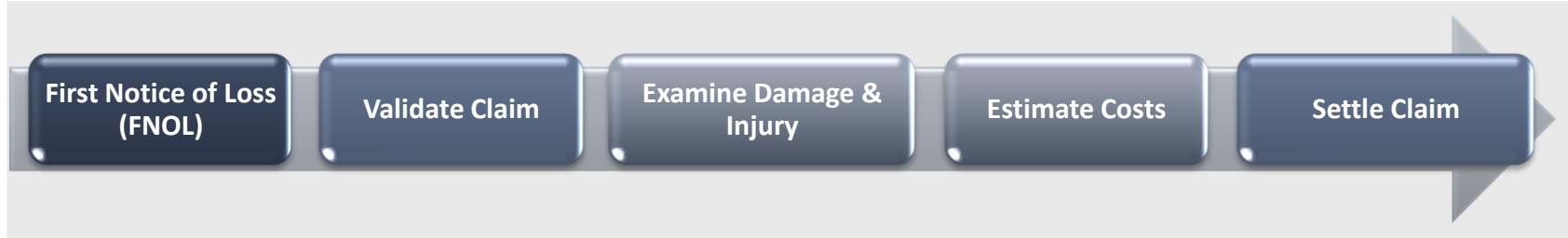
**Costs vs. Benefits Comparison**





# Insurance Claims Management (ICM)

## Business Process Overview



BPM and Adaptive Case Management driven solution to enable automation and dashboard-based management of the end-to-end claims process for Insurance Providers

## Strategic Goals

- Reduce operational costs
- Enhance customer satisfaction
- Be more competitive in the Marketplace
- Build Multi-channel delivery capabilities

## Process Advantages

- Faster claim resolution times
- Meet regulatory compliance requirements
- Provide agility, visibility and audit capabilities
- Reduce use of paper based documents
- Enhanced customer experience for claimants

# Insurance Claims Management

## Using ACM to deliver Business Value

- ACM support for knowledge worker-driven, content-rich scenarios

The screenshot displays the Oracle Insurance Claims Management interface for an auto insurance claim. The main content area is titled "Auto Insurance Claim for Peter Snow (ICM000005)". It features several sections: "Status" (First Notice of Loss), "Primary Owner" (Conan Doyle), "Policy Number" (A11323), and "Fraud Likelihood" (40%). The "First Notice of Loss" section includes "Loss Type" (Accident with No Injuries), "Loss Date and Time" (2/20/2014 4:21 PM), and "Reported Channel" (Call Center). The "Loss Address" section shows "Location Type" (Street), "Address Line 1" (111 Grand Ave), "City" (Oakland), "Country" (United States of America), and "State" (California). The "Involved Parties" section lists "Peter Snow" (Claimant) and "John Lee" (Witness). The "Involvement Details" section shows the "Reporter" as checked. On the right side, there is an "Activities" panel with buttons for "Close Claim", "Decline Claim", "Refer To Fraud Department", "Run Fraud Check", "Update FNOL", and "Verify Coverage". Below the activities is a "Milestones" panel showing a list of milestones: "Appraisal", "Closed", "Evaluation", "First Notice Of Loss (FNOL)", and "Settlement", each with an "Open" status.

Summary Status

Fraud Likelihood

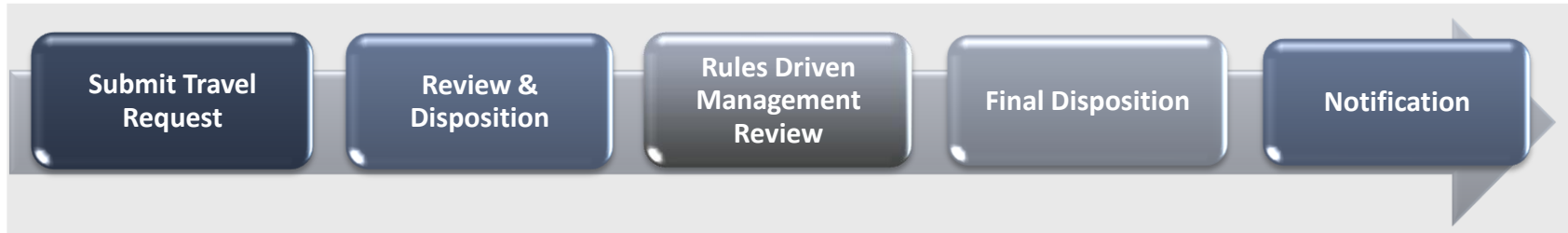
Adaptive set of activities

Rich business object data

Milestones at-a-glance

# Travel Request Management (TRM)

## Business Process Overview



Best practice BPM-driven solution to enable end-to-end automation of the Travel Request and Approval process, from initial submission to final disposition and notification.

## Strategic Goals

- Improve operational efficiencies
- Reduce costs

## Process Advantages

- Replace undependable email process
- Automated notification
- Approve multiple requests with a single action
- Easily track late responses
- Analyze travel patterns

# Document Routing and Approval (DRA)

## Business Process Overview



Best practice BPM-driven solution to enable end-to-end automation of the Document Routing & Approval process – from initial submission to final disposition and notification.

## Strategic Goals

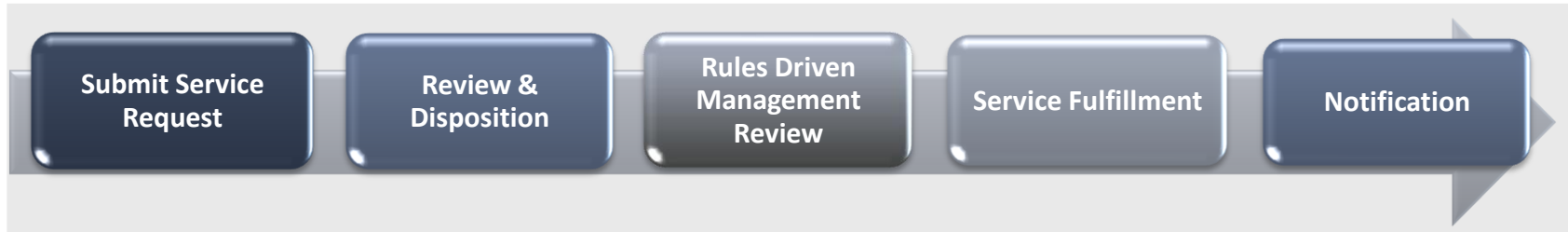
- Improve operational efficiencies
- Reduce costs

## Process Advantages

- Replace undependable email approval process
- Automated notification
- Standardize approval patterns based on document type
- Role based approvals enables increased approval pool
- Track late approvals
- Identify bottlenecks

# Internal Service Requests (ISR)

## Business Process Overview



Best practice BPM-driven solution to enable end-to-end automation approval of employee requests for services provided by fulfilling departments within the organization.

## Strategic Goals

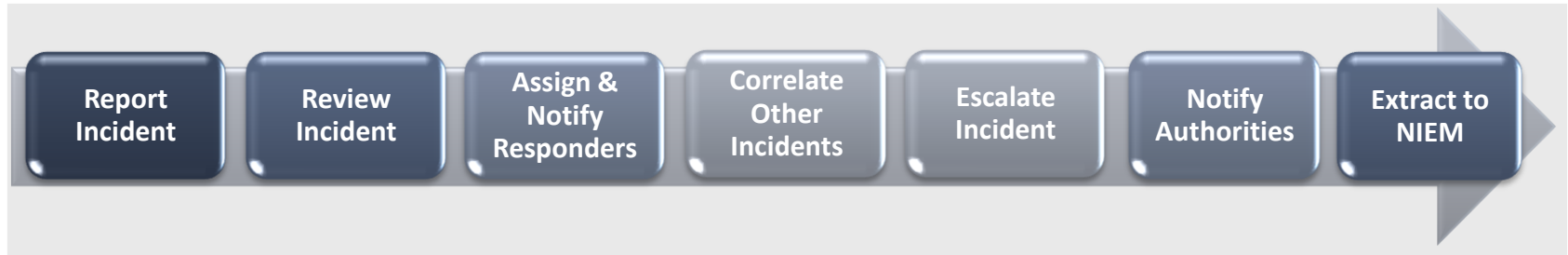
- Improve operational efficiencies
- Reduce costs

## Process Advantages

- Replace undependable email process
- Maintainable standard routings for service types
- Automated notification
- Auditable status verification
- Easily track late responses
- Analyze service patterns and bottlenecks

# Public Sector Incident Reporting (PSIR)

## Business Process Overview



Oracle BPM process driven solution for Incident Reporting for Public Sector organizations. Enables reporting by citizen or officer, resolution by PS Case Team, and process improvement.

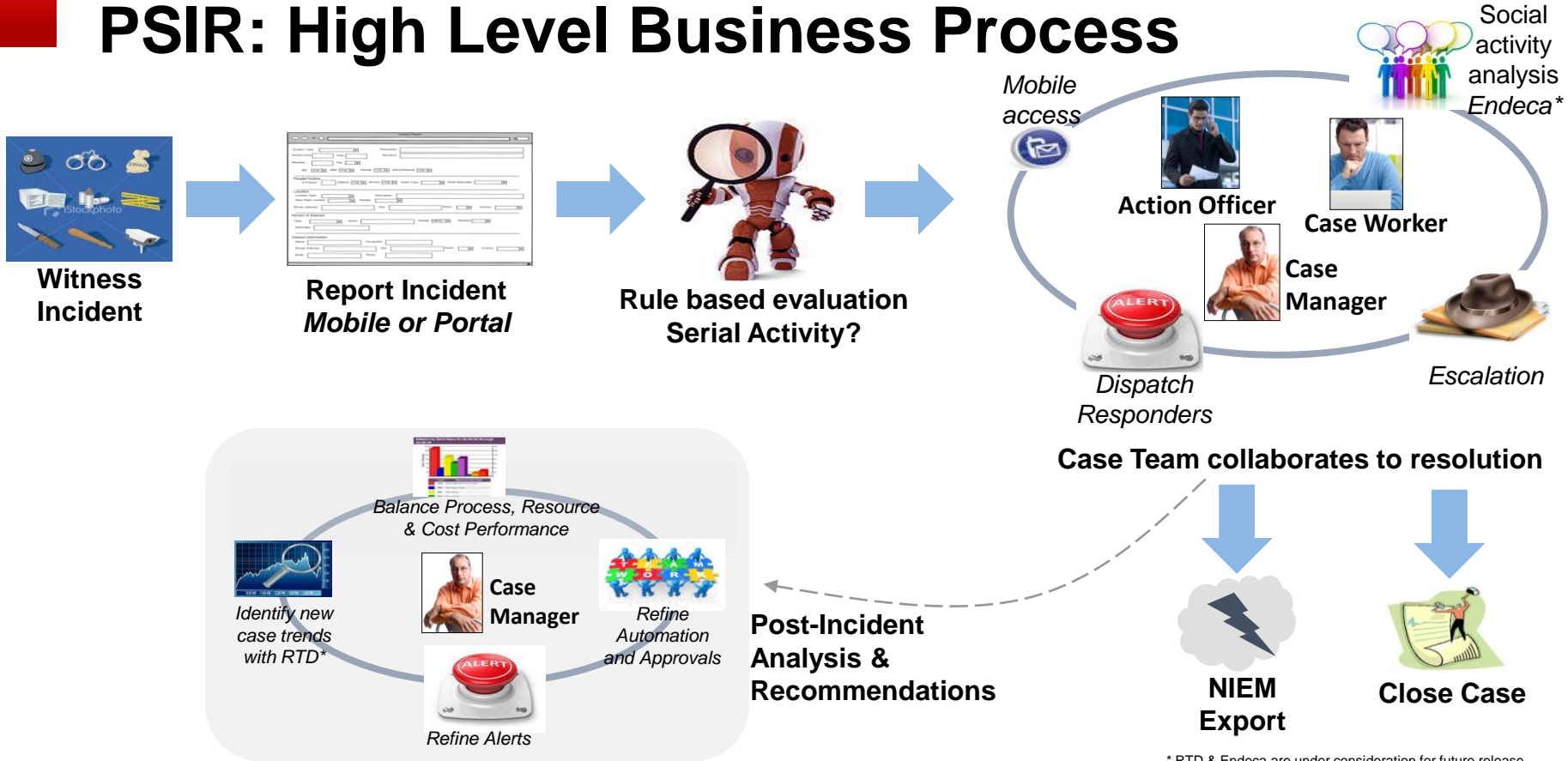
## Strategic Goals

- Enable Mobile, Web, and internal reporting
- Automate action routing based on incident data
- Relate similar incidents (rules-based and manual)
- Identify responders based on geo mapping and role
- Match with Social Network activity\*

## Process Advantages

- Efficiency driven by Rules based prioritization
- Email & SMS notification for 24x7 immediate response
- Individual status reports & automated warnings
- Agility, visibility, and auditing capabilities driven by both an Operational and a Tactical dashboard.

# PSIR: High Level Business Process



\* RTD & Endeca are under consideration for future release

# FS Unified Loan Origination (ULO) Process Accelerator

## Business Process Overview



Best practice BPM-driven collaborative solution to enable end-to-end optimization of the Loan Origination Process for a financial institution – from the creation of the financial application to disbursement of the loan amount. Supports consumer and business loans OOTB while providing a foundation to develop custom loan origination solutions.

## Strategic Goals

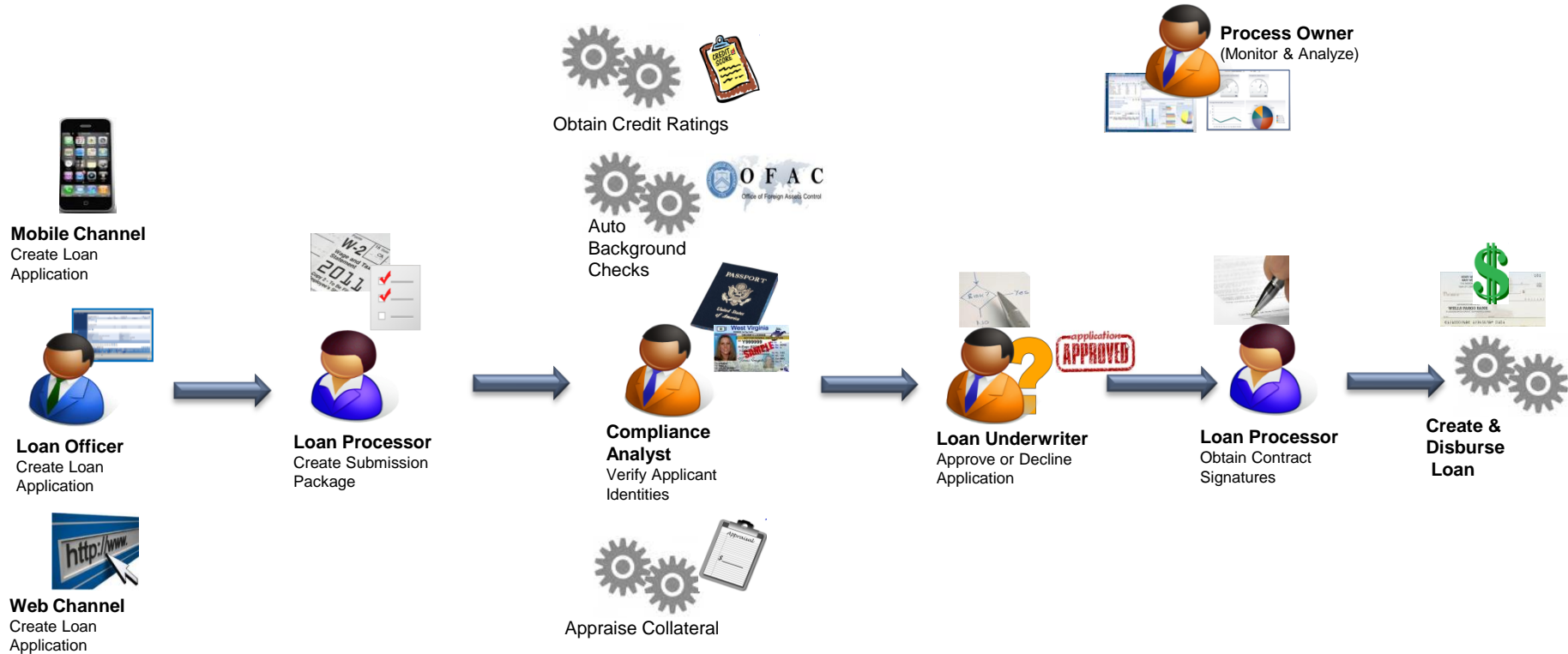
- Increase new business
- Reduce operational costs
- Quickly respond to changing market conditions
- Enhance customer satisfaction
- Build multi-channel delivery capabilities
- Comply with regulations and reduce risk

## Process Advantages

- Significantly cut down loan approval time
- Provide agility, visibility and audit capabilities
- Easily adaptable to business process changes
- Reduce use of paper based documents
- Manage shared business process across channels
- Provide a consistent, personalized customer experience

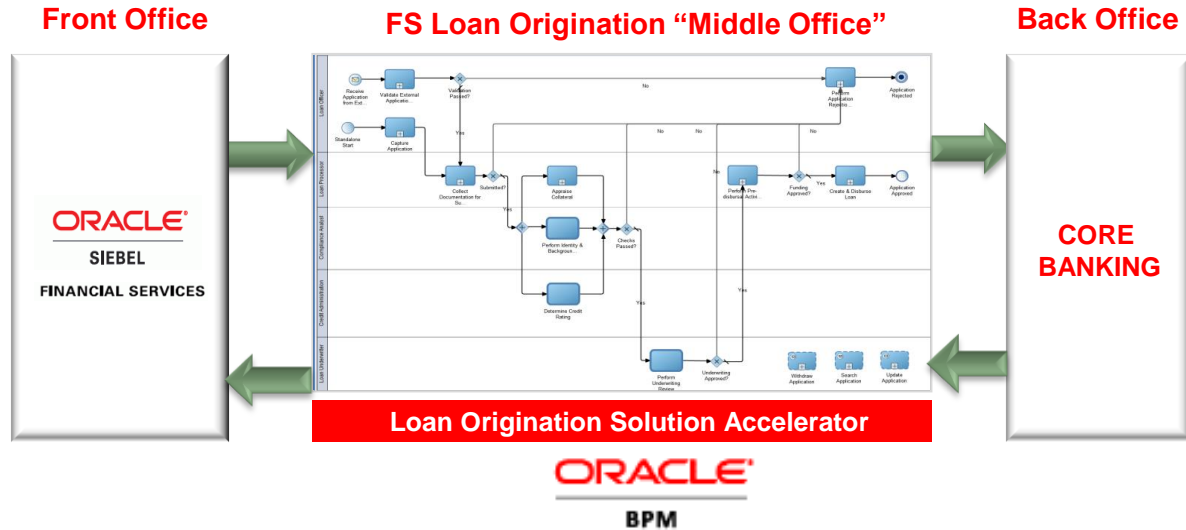


# Loan Origination: High Level Business Process



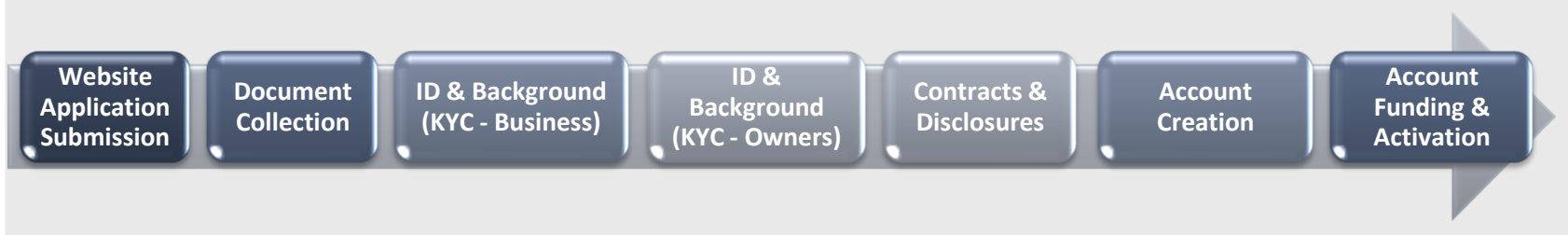
# Siebel – FS Loan Origination Integration

- Siebel CRM for Sales Cycle
  - Loan Application Capture
- BPM PA for Fulfillment
  - Loan Approval Human Tasks: ID Verification, Underwriting
  - External Services: Credit Rating, Background Checks
  - System Integration: Core Banking, Contracts, etc.
- Feedback Loop into Siebel
  - Financial Account Info
- End-to-end Process Tracking



# Business Account Opening (BAO)

## Business Process Overview



Best practice solution that enables FS providers to streamline their deposit account opening process for business customers – from application submission to account opening and funding.

## Strategic Goals

- Reduce operational costs
- Comply with regulations and reduce risk
- Enhance the customer experience
- Be more competitive in the marketplace
- Support multiple customer interaction channels

## Process Advantages

- Receive applications from web or other channels
- Significantly cut down account opening time
- Minimize human effort in process
- Provide agility, visibility and audit capabilities
- Reduce use of paper based documents

# Financial Reports Approval (FRA)

## Business Process Overview



End-to-End solution for efficient and controlled Financial Report review and approval process by financial analysts and decision makers.

### Strategic Goals

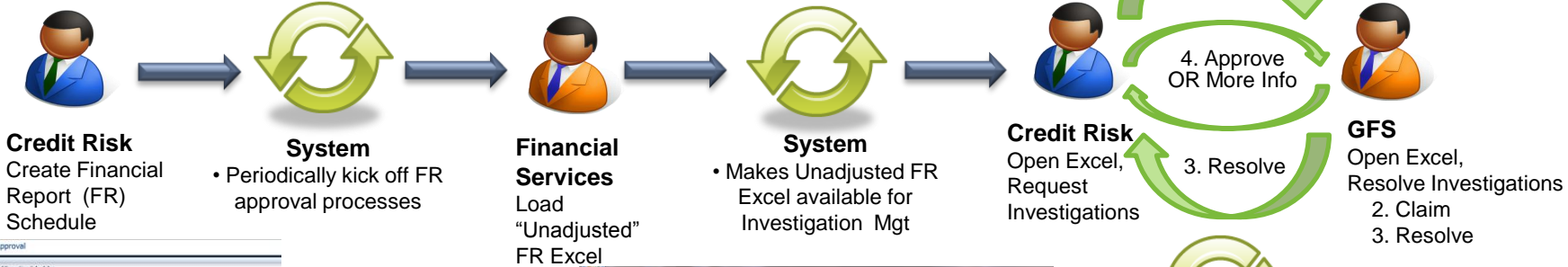
- Support report production and quality assurance
- Monitor and audit investigation workflows
- Reduce administrative costs
- Standardize process across the organization
- Improve productivity

### Process Advantages

- Timely execution of financial reporting requirements
- Role-based next best action determination and warning
- Reduce use of email and paper based flows
- Provide agility, visibility, and audit capabilities

# Financial Reports Approval

## High Level Business Flow



ORACLE Financial Reports Approval

Task	Product Group	Frequency	Actual	Schedule ID
PS004	FINC	MONTH		PS004R001

Item	Item Description	Default Start Day	Default End Day
1	Start Day	1	31
2	End Day	1	31
3	Start Day	1	31
4	End Day	1	31
5	Start Day	1	31
6	End Day	1	31
7	Start Day	1	31
8	End Day	1	31
9	Start Day	1	31
10	End Day	1	31
11	Start Day	1	31
12	End Day	1	31
13	Start Day	1	31
14	End Day	1	31
15	Start Day	1	31
16	End Day	1	31
17	Start Day	1	31
18	End Day	1	31
19	Start Day	1	31
20	End Day	1	31
21	Start Day	1	31
22	End Day	1	31
23	Start Day	1	31
24	End Day	1	31
25	Start Day	1	31
26	End Day	1	31
27	Start Day	1	31
28	End Day	1	31
29	Start Day	1	31
30	End Day	1	31

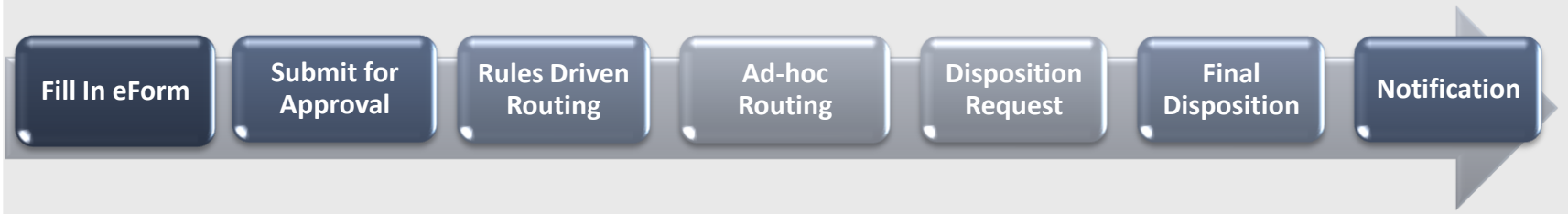
.... by Legal Entity –  
Division – Product

The screenshot shows the Oracle Financial Reports Approval system interface. A menu is overlaid on the screen with the following options: **Create**, **Update**, **MoreInfo**, **Resolve**, **Withdraw**, **Approve**, **Claim**, and **Release**. Below the menu is the text **Financial Investigations**. The background shows an Excel spreadsheet with columns for **Contingent Obligations** (MAY-12, APR-12) and **B2 Drawdown Exposure** (MAY-12, APR-12). The spreadsheet contains numerical data and percentages, with some cells highlighted in yellow. A note at the bottom of the spreadsheet reads: **Inv\_ID4 OPEN Cesare Rotundo 2013-03-21 13:44:02 - Movement expected positive CLAIMED Cesare Rotundo 2013-03-21 13:44:36 - Cesare Rotundo has claimed the investigation.**

• Assigns tasks to next in line (CR that opened, GFS that Claimed)

# Electronic Forms Management (eFM)

## Business Process Overview



Best practice BPM-driven solution to enable end-to-end automation of the Electronic Forms creation, submission, and approval process – from initial submission to final disposition and notification.

## Strategic Goals

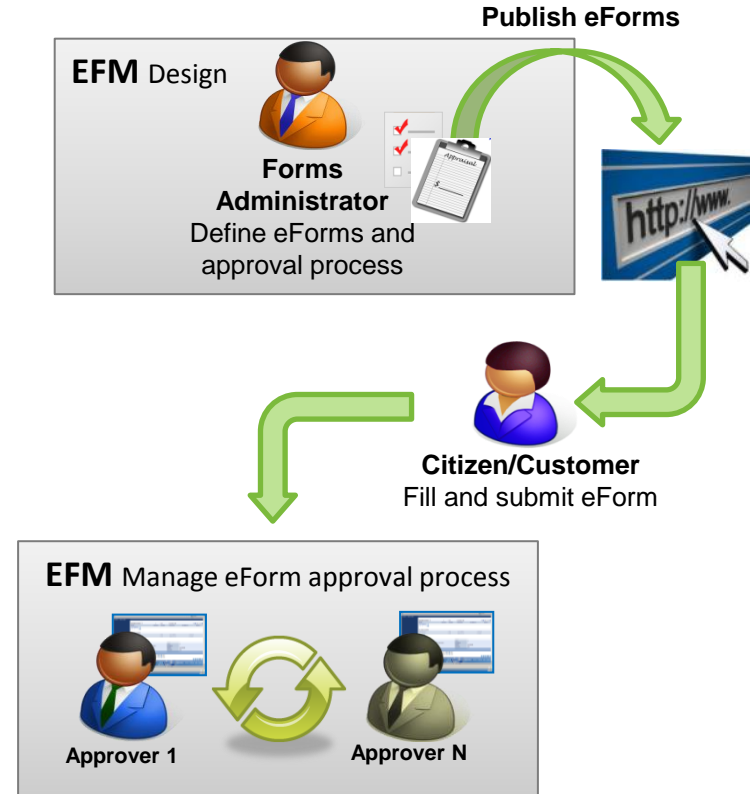
- Improve operational efficiencies
- Reduce response time
- Reduce costs

## Process Advantages

- Replace paper driven approval process
- Automated notification
- Standardize approval patterns based on form type
- Role based approvals enables increased approval pool
- Track late approvals
- Identify bottlenecks

# Electronic Forms Management (eFM)

- Organizations design electronic forms using a web based forms designer
  - Each form type is associated with specific checklists, routing patterns, and approval flows and policies
- Organizations publish eForms on portal
- End users of forms (e.g., Citizens, Customers) select, fill, and submit forms for approval
- EFM manages and supports approval process, along with supporting documents and checklists



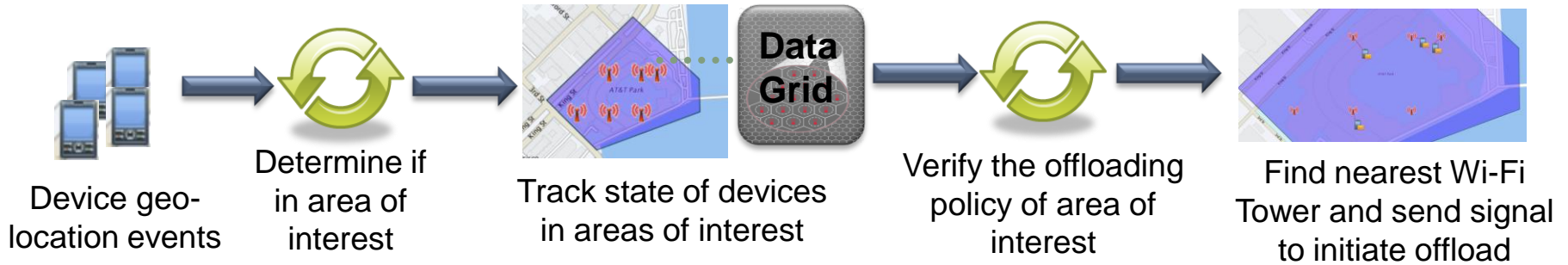
# Mobile Data Offloading (MDO)

## Solution Details

- Event Analysis with Spatial data
  - Oracle Event Processing receives continuous stream of device locations from upstream system
  - Oracle Spatial is used within OEP to determine if device coordinates are within any areas of interest. Extremely efficient processing since areas are indexed and held in memory and locations are processed in memory without network latency involved in using the database.
  - Areas of interest are graphically defined by drawing polygons, and policies specified
- Coherence integration
  - Coherence holds relevant reference data from the database in cache and helps manage state of devices that have entered an area of interest.
- BAM dashboards show current activity, devices in a particular zone, etc.
- Tech stack includes Oracle Event Processing, Oracle Business Activity Monitoring, Oracle Spatial & MapViewer, Oracle Coherence



# Mobile Data Offloading (MDO)

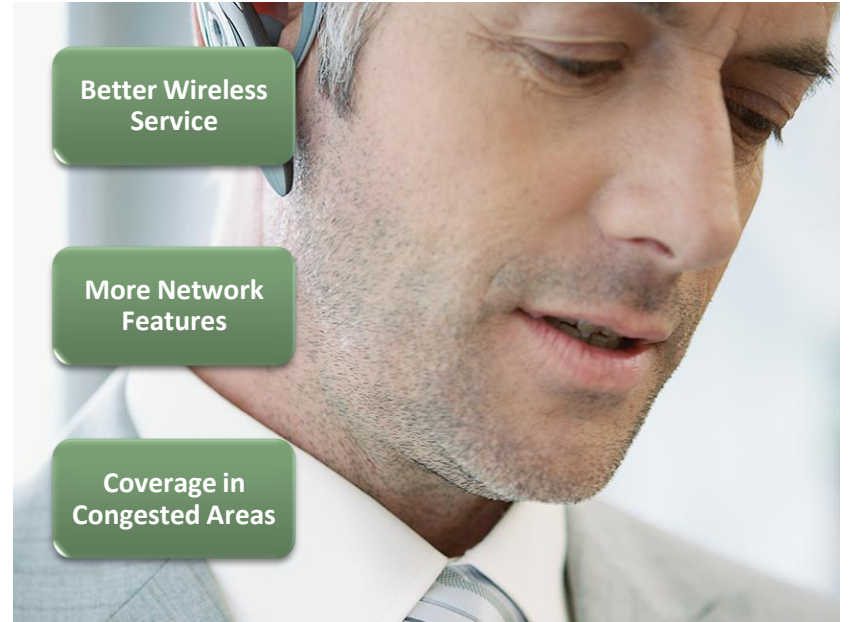


- Enables telecommunications providers to reduce congestion on cellular networks and lower cost of operations
- Policy-based offloading of mobile data to Wi-Fi and alternate networks
- Handles extremely high volumes of events and determines if a mobile device has entered an area covered by lower cost networking

# Mobile Data Offloading (MDO)



Telco Benefits



Customer Benefits

# More Info?



**Oracle BPM PA Homepage:**

<http://www.oracle.com/us/technologies/bpm/process-accelerators>



**Oracle Technology Network:**

<http://www.oracle.com/technetwork/middleware/processaccelerators>



**Twitter:**

<http://twitter.com/OProcessAccel>



**YouTube:**

<http://www.youtube.com/OProcessAccel>



**Oracle BPM blog:**

<http://blogs.oracle.com/bpm>

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