

Product / Service Feature Guidance – Oracle B2C Service

JUNE 2020

Disclaimer

The purpose of this document is to outline some of the product features currently available or under consideration for the Oracle service offering referenced above, with a focus on privacy and security related controls. Customers should refer to the available on-line product documentation for a more complete description of available product features and functionality.

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Privacy Features	Description	Oracle Documentation
<p>Data Minimization</p>	<p>Profiles are used to define access privileges. Customers can define multiple profiles with separate tasks as well as differing actions (e.g., read, edit, delete) on standard and custom objects.</p> <p>Access to specific data elements can be controlled via workspace rules and/or custom workspaces, objects, fields and rules.</p> <p>Personal information can be prevented from being captured in Chat transcripts, including those saved into Incident Threads, by using the "Off the Record" Chat feature.</p> <p>All application transactions are logged with who and when, and some with more specific details, for each create, update and delete. As of 20A Release, changes to Contact records are configurable for which field(s) to capture in the audit log details.</p> <p>Customers control the number of days for archiving and purging Incidents as well as purging session information, statistics, analytic logs, and rule logs.</p> <p>Customers can control the length of time Chat transcripts, that are captured separately from within an Incident, are retained.</p> <p>For automated purging of contacts, incidents (including archived incidents), transaction logs or custom objects containing personal information, Data Lifecycle Policies can be defined and enabled starting with the 18C Release. For staff accounts or standard objects containing personal information, customers would write custom processing to run when executing a custom report.</p>	<p>Staff Management: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=staff-management</p> <p>Workspace and Script Elements: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=workspace-and-script-elements</p> <p>Business Rules Management: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=business-rules</p> <p>Custom Fields: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-fields</p> <p>Custom Objects: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-objects</p> <p>Custom Processes: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-processes</p> <p>Configure chat off the record: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=t_Configure_chat_off_the_record_ax1234056</p> <p>Audit Logs: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=c_Audit_logs_co1321005</p>

	<p>Test instances can be created without Incident and Contact data using 'Discreet Clone' feature in Configuration Assistant.</p>	<p>Select Contact Fields for Auditing: http://documentation.custhelp.com/euf/assets/devdocs/bui/topicrefs/t_bui_field_audit_editor.html</p> <p>Incident Management: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=c_Managing_incidents_aa1131869</p> <p>Age database settings (for Chat purge settings): http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=c_Agedatabase_settings_aq1149300</p> <p>Data Lifecycle Management (in Administering Agent BUI): http://documentation.custhelp.com/euf/assets/devdocs/buiadmin/topicrefs/c_bui_Data_lifecycle_management.html</p> <p>Create a custom script: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=t_Create_a_custom_script_ah1137760</p> <p>Managing Test Sites (in Oracle B2C Service Using Configuration Assistant): http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=test-sites</p>
<p>Data Deletion at Contract Term or Termination</p>	<p>Data is deleted 60 days after B2C Service contract termination per Hosting and Delivery Policies.</p>	<p>Cloud Services Hosting & Delivery Policies: http://www.oracle.com/us/corporate/contracts/cloud-services/index.html</p>

<p>Data Portability</p>	<p>Customers can create reports that could be provided to their end-users electronically, via a custom request process or custom API.</p> <p>Formats supported for export are HTML, PDF, Excel, XML, Image/JPG and Delimited/CSV.</p>	<p>Creating Basic Custom Reports: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=creating-basic-custom-reports</p> <p>Custom Reports: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-reports</p> <p>Report Management (on .net Agent Console): http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=using-reports</p> <p>Working with Reports (on BUI Agent Console): http://documentation.custhelp.com/euf/assets/devdocs/bui/topicrefs/c_bui_using_reports.html</p> <p>Customer Portal Development Overview: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=developer-overview</p> <p>Customer Portal Widgets: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=customer-portal-widgets</p> <p>REST API for B2C Service: https://docs.oracle.com/en/cloud/saas/b2c-service/20b/cxsvc/index.html</p>
<p>End-user Access and Other Requests</p>	<p>Customers can configure to allow their end-users (contacts) to maintain their records when designing their Customer Portal pages.</p>	<p>Configuring login functionality: http://www.oracle.com/pls/topic/lookup</p>

	<p>Delete would need to be via a service request by the end-user to the customer to ensure data integrity. The request can be a function built into the Portal.</p>	<p>p?ctx=cloud&id=c_Configuring_login functionality_av1131499</p> <p>Customer Portal Widgets: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=customer-portal-widgets</p>
<p>Right to Erasure and/or Right to be Forgotten</p>	<p>Customers can remove their staff records and their contacts (end-users) including related Incidents through standard product usage.</p> <p>For any personal information captured in long narrative/text fields (excluding Incident Thread), customers would write custom processing to run when executing a custom report.</p> <p>Incidents that have been archived are able to be selectively deleted starting with the 18c release. Incidents that may have personal information included in Incident Threads can have data redacted starting with the 18C release.</p> <p>Customers can control what data is captured in Chat transcripts via business processes using the “Off the Record” feature. Additionally, starting with Release 19A, a privileged user can edit or delete Chat data using a customer created report and available in-line edit or delete reporting features.</p>	<p>Managing staff accounts: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=c_Managing_staff_accounts_ar1134194</p> <p>Deleting contacts: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=c_Deleting_contacts_bz1130112</p> <p>Business Rules Management: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=business-rules</p> <p>Custom Fields: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-fields</p> <p>Custom Objects: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-objects</p> <p>Custom Processes: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-processes</p> <p>Workspace and Script Elements: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=workspace-and-script-elements</p>

		<p>Create a custom script: Create a custom script ah1137760</p> <p>Delete an Archived Incident:
 Delete an archived incident">Delete an archived incident</p> <p>Edit or Convert a Response Thread: Convert a response thread aa1382933</p> <p>Chat Reporting:
 Chat Reporting</p> <p>Configure chat off the record: <a 365="" 46="" 608="" 871"="" href="http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=t>Configure chat off the record ax1234056</p> </td> </tr> <tr> <td data-bbox="> <p>Notice and Consent</p> </p>	<p>Customers can obtain consent for mailings or survey invitations via global opt-in/out control for each end-user.</p> <p>Customers can create custom code for obtaining consent on their Customer Portal by using Widget Builder or Customer Portal Framework or custom APIs.</p>	<p>Managing contact opt-ins: Managing contact opt-ins ah1309208</p> <p>Customer Portal Widgets:
 Customer Portal Widgets</p> <p>Customer Portal Development Overview:</p>
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Availability	<p>B2C Service provides DR for all environments with RPO of 1 hour and RTO of 12 hours.</p> <p>Full backups of all customer information are taken on weekly basis. (retained for 52 weeks).</p> <p>Incremental backups are done daily (retained for 14 days)</p> <p>Customers have ability to request export information on demand for a fee and a full information dump at termination.</p>	<p>Oracle SaaS Public Cloud Services Pillar Document: http://www.oracle.com/assets/saas-public-cloud-services-pillar-3610529.pdf</p> <p>The Oracle B2C Service Platform White Paper: http://servicecloud.custhelp.com/app/answers/detail/a_id/181</p>
Tracking Technologies	<p>Cookies are stored on the local workstation in the default location as defined by the end-user's browser. Customers can set a configuration on B2C Service for when to expire those cookies.</p> <p>IP addresses are collected as part of session management in session history tables. These are used by Oracle personnel if any security analysis is needed. Session data is well protected and has several configuration settings for customers to manage.</p>	<p>Customer Portal configuration setting keys: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=r_cpo_Configuration_keys_072016</p> <p>Session-data Security: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=c_Session_data_af1211025</p>

	Any other device ID would be captured via custom fields and therefore would be the responsibility of the customer to request consent and opt-out capabilities through custom workspaces, objects, fields, rules, and processing.	Cookie information can be found under KB Article #4526: https://cx.rightnow.com/app/answers/detail/a_id/4526 Note: A valid cx.rightnow.com account is required to access this document.
Security Features	Description	Oracle Documentation
Multi-factor authentication	B2C Service supports multi-factor using SAML 2.0 or other Partner (3rd party) solutions.	SAML 2.0 Open Login: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=saml-2
IP white-listing	Customers can define and manage their IP whitelist directly in B2C Service for their instances.	Site protection: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=c_Site_protection_af1210864
Separation of duties	Profiles are used to define access privileges. Customers can define multiple profiles with separate tasks as well as differing actions (e.g., read, edit, delete, etc.) on standard and custom objects. Enforcing multi-task and multi-approval can be enabled via custom objects, fields, rules, and processing. All application transactions are logged with who and when, and some with more specific details, for each create, update and delete.	Staff Management: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=staff-management Business Rules Management: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=business-rules Custom Fields: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-fields Custom Objects: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-objects

		<p>Custom Processes: http://www.oracle.com/pls/topic/looku p?ctx=cloud&id=custom-processes</p> <p>Workspace and Script Elements: http://www.oracle.com/pls/topic/looku p?ctx=cloud&id=workspace-and-script-elements</p> <p>Audit Logs: http://www.oracle.com/pls/topic/looku p?ctx=cloud&id=c Audit logs_co1321005</p>
<p>Flagging Special Categories of Data</p>	<p>Access to specific data elements can be controlled via workspace rules and/or custom workspaces, objects, fields and rules.</p> <p>There are no special category designators; however, customers can establish their own via custom workspaces, objects, fields, rules, and processing.</p>	<p>Business Rules Management: http://www.oracle.com/pls/topic/looku p?ctx=cloud&id=business-rules</p> <p>Custom Fields: http://www.oracle.com/pls/topic/looku p?ctx=cloud&id=custom-fields</p> <p>Custom Objects: http://www.oracle.com/pls/topic/looku p?ctx=cloud&id=custom-objects</p> <p>Custom Processes: http://www.oracle.com/pls/topic/looku p?ctx=cloud&id=custom-processes</p> <p>Workspace and Script Elements: http://www.oracle.com/pls/topic/looku p?ctx=cloud&id=workspace-and-script-elements</p>
<p>Separate auditing and "detective control" privileges</p>	<p>All application transactions are logged with who and when, and some with more specific details, for each</p>	<p>Audit Logs: http://www.oracle.com/pls/topic/looku</p>

	<p>create, update and delete. Audit log visibility can be controlled via custom workspaces.</p> <p>Profiles are used to define access privileges. Customers can define multiple profiles with separate tasks as well as differing actions (e.g., read, edit, delete, etc.) on standard and custom objects.</p> <p>Application transaction logs are read-only via the application. Reports can be written to export data for customer storage.</p>	<p>p?ctx=cloud&id=c Audit logs co1321005</p> <p>Workspace and Script Elements: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=workspace-and-script-elements</p> <p>Staff Management: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=staff-management</p> <p>Transaction Database Table: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=transactions-database-table</p>
Features Limiting Oracle's access to customer data	<p>Technical Operations access based on need-to-know. Technical Support access based on need-to-know. All access to application and associated data is controlled by RBAC.</p> <p>All security related functions logged to WORM storage. All access to database, HMS and file system is tracked. Access to environment controlled through Bastion hosts and Yubikey authentication.</p>	<p>Cloud Services Hosting & Delivery Policies: http://www.oracle.com/us/corporate/contracts/cloud-services/index.html</p> <p>Oracle SaaS Public Cloud Services Pillar Document: http://www.oracle.com/assets/saas-public-cloud-services-pillar-3610529.pdf</p> <p>The Oracle B2C Service Platform White Paper: http://servicecloud.custhelp.com/app/answers/detail/a_id/181</p>
Encryption	<p>All file systems are encrypted; Oracle manages the keys. All data into and out of environment can be encrypted in transit. Customers have option of turning on or off. Customers can manage keys if using their own domain name.</p>	<p>The Oracle B2C Service Platform White Paper: http://servicecloud.custhelp.com/app/answers/detail/a_id/181</p>

		<p>Securing B2C Service: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=understanding-oracle-service-cloud-security</p>
Anonymization	<p>For specific fields, customers can systematically control what is stored via custom workspaces, objects, fields, rules, and processing.</p> <p>Permanent redaction within Incident Thread is available for up to 8 definable patterns. For non-definable patterns, customers would need to control via business process.</p>	<p>Business Rules Management: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=business-rules</p> <p>Custom Fields: https://docs.oracle.com/en/cloud/saas/b2c-service/20b/famug/core-features.html#custom-fields</p> <p>Custom Objects: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-objects</p> <p>Custom Processes: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-processes</p> <p>Workspace and Script Elements: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=workspace-and-script-elements</p> <p>Managing incident threads: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=c_Managing_incident_threads_aa1358732</p>
Pseudonymization	<p>For specific fields, customers can systematically control what is stored via custom workspaces, objects, fields, rules, and processing.</p>	<p>Business Rules Management: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=business-rules</p>

		<p>Custom Fields: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-fields</p> <p>Custom Objects: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-objects</p> <p>Custom Processes: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-processes</p> <p>Workspace and Script Elements: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=workspace-and-script-elements</p>
<p>Data Masking</p>	<p>Visibility of specific data elements can be controlled via workspace rules and/or custom workspaces, objects, fields and rules.</p> <p>For custom fields, customers can systematically control what is visible via custom workspaces, objects, fields, rules, and processing.</p>	<p>Business Rules Management: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=business-rules</p> <p>Custom Fields: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-fields</p> <p>Custom Objects: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-objects</p> <p>Custom Processes: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-processes</p> <p>Workspace and Script Elements: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=workspace-and-script-elements</p>

<p>Truncation</p>	<p>Permanent truncation within the Incident Thread is available for up to 8 definable patterns. For non-definable patterns, customers would need to control via business process.</p> <p>For custom fields, customers can define input masks and systematically control what is stored via custom workspaces, objects, fields, rules, and processing.</p>	<p>Managing incident threads: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=c_Managing_incident_threads_aa1358732</p> <p>Business Rules Management: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=business-rules</p> <p>Custom Fields: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-fields</p> <p>Custom Objects: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-objects</p> <p>Custom Processes: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-processes</p> <p>Workspace and Script Elements: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=workspace-and-script-elements</p>
<p>Tokenization</p>	<p>No specific functionality provided by this service/product.</p>	
<p>Logging</p>	<p>Access and page views by end users are stored for a customer defined duration. (0=never purge, 60 days is default)</p> <p>Profiles are used to define access privileges. Customers can define multiple profiles with separate tasks as well as differing actions (e.g., read, edit, delete, etc.) on standard and custom objects</p>	<p>End-user session can be found under KB Article #499: https://cx.rightnow.com/app/answers/detail/a_id/499</p> <p>Note: A valid cx.rightnow.com account is required to access this document.</p>

	<p>All application transactions are logged with who and when, and some with more specific details, for each create, update and delete. Read logging is available for Incident Threads and Chat Transcripts as well as Contacts, if configured. As of 20A Release, changes to Contact records are configurable for which field(s) to capture in the audit log details.</p> <p>As of Release 18D, any report that is executed, exported, forwarded or printed from any agent facing source is logged into the Analytics Audit log with who, what action and when. Data is retained for 30 days.</p>	<p>Staff Management: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=staff-management</p> <p>Transaction Database Table: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=transactions-database-table</p> <p>Audit Logs: http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=c_Audit_logs_co1321005</p> <p>Read Logging can be found under KB Article #5421: https://cx.rightnow.com/app/answers/detail/a_id/5421</p> <p>Note: A valid cx.rightnow.com account is required to access this document.</p> <p>Select Contact Fields for Auditing: http://documentation.custhelp.com/euf/assets/devdocs/bui/topicrefs/t_bui_field_audit_editor.html</p> <p>Monitoring Report Usage: https://docs.oracle.com/en/cloud/saas/b2c-service/20b/famug/analytics.html#monitoring-report-usage</p>
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