

Product/Service Feature Guidance – Oracle Service Cloud

OCTOBER 2019

Disclaimer

The purpose of this document is to outline some of the available product features 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 list of product features and functionality.

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Oracle Cloud Services Agreements and Documentation

Cloud Services: <http://www.oracle.com/us/corporate/contracts/cloud-services/index.html>

Privacy Features	Description	Oracle Documentation
<p>Data Minimization</p>	<ul style="list-style-type: none"> • 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. • Access to specific data elements can be controlled via workspace rules and/or custom workspaces, objects, fields and rules. • Personal data can be prevented from being captured in Chat transcripts, including those saved into Incident Threads, by using the "Off the Record" Chat feature. • All application transactions are logged with who & when, and some with more specific details, for each create, update and delete. • Customers control the number of days for archiving and purging Incidents as well as purging session information, statistics, analytic logs, and rule logs. • Customers can control the length of time Chat transcripts, that are captured separately from within an Incident, are retained. • For automated purging of contacts, incidents (including archived incidents), transaction logs or custom objects containing Personal Information (PI), Data Lifecycle Policies can be defined and enabled starting with the 18C Release. For staff accounts or standard objects containing Personal Information (PI), customer would write custom processing to run when executing a custom report. • Test instances can be created without Incident and Contact data using 'Discreet Clone' feature in Configuration Assistant. 	<ul style="list-style-type: none"> • Staff Management http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=staff-management • Workspace and Script Elements http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=workspace-and-script-elements • 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 • Custom Processes http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-processes • Configure chat off the record http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=Configure_chat_off_the_record_ax1234056 • Audit logs http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=audit_logs_co1321005 • Managing incidents http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=Managing_incidents_aa1131869 • Agedatabase settings (for Chat purge settings) http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=Agedatabase_settings_aq1149300 • Data Lifecycle Management (in Administering Agent BUI) http://documentation.custhelp.com/euf/assets/devdocs/buiadmin/topicrefs/c_bui_Data_lifecycle_management.html • Create a custom script http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=t

Privacy Features	Description	Oracle Documentation
		<ul style="list-style-type: none"> • Create a custom script ah1137760 • Managing Test Sites(in <i>Using Service Cloud Configuration Assistant</i>) http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=te-st-sites
Data Deletion at Contract Term or Termination	<ul style="list-style-type: none"> • <i>Data is deleted 60 days after Service Cloud contract termination per Hosting & Delivery Policies.</i> 	<ul style="list-style-type: none"> • Cloud Hosting & Delivery Policy http://www.oracle.com/assets/ocloud-hosting-delivery-policies-3089853.pdf
Data Portability	<ul style="list-style-type: none"> • <i>Customers can create reports that could be provided to their end-users electronically, via a custom request process or custom API.</i> • <i>Formats currently supported for export are HTML, PDF, Excel, XML, Image/JPG and Delimited/CSV.</i> 	<ul style="list-style-type: none"> • Creating Basic Custom Reports http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=creating-basic-custom-reports • Custom Reports http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-reports • Report Management (on .net Agent Console) http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=using-reports • Working with Reports (on BUI Agent Console) http://documentation.custhelp.com/euf/assets/devdocs/bui/topicrefs/c_bui_using_reports.html • Customer Portal Development http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=developer-overview • Customer Portal Widgets http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=customer-portal-widgets • REST API for Service Cloud http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=XSVC
End-user Access and Other Requests	<ul style="list-style-type: none"> • <i>Customers can configure to allow their end-users (contacts) to maintain their records when designing their Customer Portal pages.</i> • <i>Delete would need to be via a request by the end-user to the customer to ensure data integrity. The request can be a function built into the Portal.</i> 	<ul style="list-style-type: none"> • Configuring login functionality http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=Configuring_login_functionality_av1131499 • Customer Portal Widgets http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=customer-portal-widgets
Right to Erasure and/or Right to be Forgotten	<ul style="list-style-type: none"> • <i>Customer can remove their staff records and their contacts (end-users) including related Incidents through standard product usage.</i> • <i>For any PI captured in long narrative/text fields</i> 	<ul style="list-style-type: none"> • Managing staff accounts http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=Managing_staff_accounts_ar1134194 • Deleting contacts

Privacy Features	Description	Oracle Documentation
	<p><i>(excluding Incident Thread), customer would write custom processing to run when executing a custom report.</i></p> <ul style="list-style-type: none"> • <i>Incidents that have been archived are able to be selectively deleted starting with the 18C release.</i> • <i>Incidents that may have PI included in Incident Threads can have data redacted starting with the 18C release.</i> • <i>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.</i> 	<p>http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=c Deleting_contacts_bz1130112</p> <ul style="list-style-type: none"> • Business Rules Management http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=b usiness-rules • Custom Fields http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=cu stom-fields • Custom Objects http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=cu stom-objects • Custom Processes http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=cu stom-processes • Workspace and Script Elements http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=w orkspace-and-script-elements • Create a custom script http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=t Create_a_custom_script_ah1137760 • Delete an Archived Incident http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=t Delete_an_archived_incident • Edit or Convert a Response Thread http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=t Convert_a_response_thread_aa1382933 • Chat Reporting http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=c Chat_Reporting • Configure chat off the record http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=t Configure_chat_off_the_record_ax1234056
<p>Notice and Consent</p>	<ul style="list-style-type: none"> • <i>Customers can obtain consent for mailings or survey invitations via global opt-in/out control for each end-user.</i> • <i>Customers can create custom code for obtaining consent on their Customer Portal by using Widget Builder or Customer Portal Framework or custom APIs.</i> 	<ul style="list-style-type: none"> • Managing contact opt-ins http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=c Managing_contact_opt-ins_ah1309208 • Customer Portal Widgets http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=cu stomer-portal-widgets • Customer Portal Development

Privacy Features	Description	Oracle Documentation
		<p>http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=developer-overview</p> <ul style="list-style-type: none"> • REST API for Service Cloud http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=XSVC • Technical Documentation and Sample Code can be found under KB Article #5169: https://cx.rightnow.com/app/answers/detail/a_id/5169 Note: A valid cx.rightnow.com account is required to access this document.
Availability	<ul style="list-style-type: none"> • <i>Service Cloud currently provides DR for all environments with RPO of 1 hour and RTO of 12 hours.</i> • <i>Full backups of all customer data is done weekly (retained for 52 weeks).</i> • <i>Incremental backups are done daily (retained for 14 days)</i> • <i>Customer has ability to request export data on demand for a fee and a full data dump at termination.</i> 	<ul style="list-style-type: none"> • Oracle SaaS Public Cloud Services Pillar Document http://www.oracle.com/assets/saas-public-cloud-services-pillar-3610529.pdf • The Oracle Service Cloud Platform White Paper http://servicecloud.custhelp.com/app/answers/detail/a_id/181
Tracking Technologies	<ul style="list-style-type: none"> • <i>Cookies are stored on the local workstation in the default location as defined by the end-user's browser. The customer can set a configuration on Service Cloud for when to expire those cookies.</i> • <i>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.</i> • <i>Any other device id's would be captured via custom fields and therefore would be the responsibility of the customer to request consent & opt-out capabilities through custom workspaces, objects, fields, rules, and processing.</i> 	<ul style="list-style-type: none"> • Customer Portal configuration setting keys http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=r_cpo_Configuration_keys_072016 • Session data http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=c_Session_data_af1211025 • 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	Feature/Control	Oracle Documentation
Multi-factor authentication	<ul style="list-style-type: none"> • <i>Service Cloud supports multi-factor using SAML 2.0 or other Partner (3rd party) solutions.</i> 	<ul style="list-style-type: none"> • SAML 2.0 Open Login http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=saml-2
IP white-listing	<ul style="list-style-type: none"> • <i>Customers can define & manage their IP whitelist directly in Service Cloud for their instances.</i> 	<ul style="list-style-type: none"> • Site protection http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=Site_protection_af1210864
Separation of duties	<ul style="list-style-type: none"> • <i>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.</i> • <i>Enforcing multi-task & multi-approval can be enabled via custom objects, fields, rules, and processing.</i> • <i>All application transactions are logged with who & when, and some with more specific details, for each create, update and delete.</i> 	<ul style="list-style-type: none"> • 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 • Custom Processes http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-processes • Workspace and Script Elements http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=workspace-and-script-elements • Audit logs http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=Audit_logs_co1321005
Flagging Special Categories of Data	<ul style="list-style-type: none"> • <i>Access to specific data elements can be controlled via workspace rules and/or custom workspaces, objects, fields and rules.</i> • <i>There are no specific sensitive designators; however customer can establish their own via custom workspaces, objects, fields, rules, and processing.</i> 	<ul style="list-style-type: none"> • 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

Security Features	Feature/Control	Oracle Documentation
		<ul style="list-style-type: none"> • Custom Processes http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-processes • Workspace and Script Elements http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=workspace-and-script-elements
Separate auditing and “detective control” privileges	<ul style="list-style-type: none"> • <i>All application transactions are logged with who & when, and some with more specific details, for each create, update and delete. Audit log visibility can be controlled via custom workspaces.</i> • <i>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.</i> • <i>Application transaction logs are read-only via the application. Reports can be written to export data for customer storage.</i> 	<ul style="list-style-type: none"> • Audit logs http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=audit_logs_co1321005 • Workspace and Script Elements http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=workspace-and-script-elements • Staff Management http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=staff-management • Transactions Database Table http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=transactions-database-table
Features limiting Oracle’s access to customer data	<ul style="list-style-type: none"> • <i>Technical Operations access based on need-to-know.</i> • <i>Technical Support access based on need-to-know.</i> • <i>All access to application and associated data is controlled by RBAC.</i> • <i>All security related functions logged to WORM storage.</i> • <i>All access to database, HMS and file system is tracked.</i> • <i>Access to environment controlled through Bastion hosts and Yubikey authentication.</i> 	<ul style="list-style-type: none"> • Cloud Hosting & Delivery Policy http://www.oracle.com/assets/ocloud-hosting-delivery-policies-3089853.pdf • Oracle SaaS Public Cloud Services Pillar Document http://www.oracle.com/assets/saas-public-cloud-services-pillar-3610529.pdf • The Oracle Service Cloud Platform White Paper http://servicecloud.custhelp.com/app/answers/detail/a_id/181
Encryption	<ul style="list-style-type: none"> • <i>All file systems are encrypted; Oracle manages the keys.</i> • <i>All data into and out of environment can be encrypted in transit. Customer has option of turning on or off. Customer can manage keys if using their own domain name.</i> 	<ul style="list-style-type: none"> • The Oracle Service Cloud Platform White Paper http://servicecloud.custhelp.com/app/answers/detail/a_id/181 • Securing Service Cloud http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=understanding-oracle-service-cloud-security
Anonymization	<ul style="list-style-type: none"> • <i>For specific fields, customer can systematically control what is stored via custom workspaces, objects, fields, rules, and processing.</i> 	<ul style="list-style-type: none"> • Business Rules Management http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=business-rules

Security Features	Feature/Control	Oracle Documentation
	<ul style="list-style-type: none"> • <i>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.</i> 	<ul style="list-style-type: none"> • 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 • Custom Processes http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-processes • Workspace and Script Elements http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=workspace-and-script-elements • Managing incident threads http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=Managing_incident_threads_aa1358732
Pseudonymization	<ul style="list-style-type: none"> • <i>For specific fields, customer can systematically control what is stored via custom workspaces, objects, fields, rules, and processing.</i> 	<ul style="list-style-type: none"> • 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 • Custom Processes http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-processes • Workspace and Script Elements http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=workspace-and-script-elements
Masking	<ul style="list-style-type: none"> • <i>Visibility of specific data elements can be controlled via workspace rules and/or custom workspaces, objects, fields and rules.</i> • <i>For custom fields, customer can systematically control what is visible via custom workspaces, objects, fields, rules, and processing.</i> 	<ul style="list-style-type: none"> • 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

Security Features	Feature/Control	Oracle Documentation
		<ul style="list-style-type: none"> • Custom Objects http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-objects • Custom Processes http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-processes • Workspace and Script Elements http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=workspace-and-script-elements
Truncation	<ul style="list-style-type: none"> • <i>Permanent truncation within Incident Thread is available for up to 8 definable patterns. For non-definable patterns, customers would need to control via business process.</i> • <i>For custom fields, customer can define input masks and systematically control what is stored via custom workspaces, objects, fields, rules, and processing.</i> 	<ul style="list-style-type: none"> • Managing incident threads http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=Managing incident threads_aa1358732 • 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 • Custom Processes http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=custom-processes • Workspace and Script Elements http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=workspace-and-script-elements
Tokenization	<ul style="list-style-type: none"> • <i>Not provided by Service.</i> 	
Logging	<ul style="list-style-type: none"> • <i>Access and page views by end users are stored for a customer defined duration. (0=never purge, 60 days is default)</i> • <i>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</i> • <i>All application transactions are logged with who & when, and some with more specific details, for</i> 	<ul style="list-style-type: none"> • End-user session can be found under KB Article #499: https://cx.rightnow.com/app/answers/detail/a_id/499 Note: A valid cx.rightnow.com account is required to access this document. • Staff Management http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=staff-management • Transactions Database Tablehttp://www.oracle.com/pls/topic/lookup?ctx=cloud&id=transactions-database-table

Security Features	Feature/Control	Oracle Documentation
	<p><i>each create, update and delete. Read logging is available for Incident Threads and Chat Transcripts as well as Contacts, if configured.</i></p> <ul style="list-style-type: none"> <i>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.</i> 	<ul style="list-style-type: none"> Audit logs http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=c_Audit_logs_co1321005 Read Logging can be found under KB Article #5421: https://cx.rightnow.com/app/answers/detail/a_id/5421 Note: A valid cx.rightnow.com account is required to access this document. Monitoring Report Usage http://www.oracle.com/pls/topic/lookup?ctx=cloud&id=m_onitoring-report-usage