

Connecting with Oracle Intelligent Advisor

Security, performance and architecture considerations when connecting Oracle Intelligent Advisor Cloud Service to your on-premises or other cloud services infrastructure

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Purpose

This document provides an overview of the options available for connecting and securing Oracle Intelligent Advisor with on-premises or other cloud environments.

Motivation

Oracle Intelligent Advisor has been used by the largest government agencies, multi-national financial institutions and other organizations for more than 25 years. During that time, it has evolved from an on-premises offering to a full-featured cloud native enterprise decision automation platform that delivers 24 x 7 auditable advice and decisions at the scale you need.

We understand that organizations operate in hybrid environments where the advice, calculations and decisions made with Intelligent Advisor need to be deeply integrated with your core systems of record. And we understand that you need to ensure the security, reliability and integrity of all data that flows between applications, regardless of the data center each is operating in.

This document describes the options and capabilities available for Oracle Intelligent Advisor Cloud Service to help you plan for your security, reliability and performance needs. The advice contained in the document is general in nature. For specific guidance for your organization's circumstances, please engage your Oracle sales or support team.

Key Concepts

Oracle Intelligent Advisor Cloud Service is a SaaS application. It is delivered on Oracle's highly scalable and globally available Oracle Cloud Infrastructure (OCI).

Oracle Policy Automation was a previously sold on-premises product that in its 12.2.x versions is almost identical to the Intelligent Advisor cloud offering. This product is also referred to as [Oracle Intelligent Advisor On-premises or Self-managed edition](#). Oracle Intelligent Advisor Cloud Service is recommended for all Oracle Policy Automation customers that wish to continue using a fully supported offering with a strong roadmap of ongoing innovation.

Oracle Intelligent Advisor Cloud Service can be used either independently from or together with **Oracle Fusion Application Suite**. Oracle Fusion Applications unify HCM, ERP, SCM and CRM capabilities into a single application instance. Oracle Intelligent Advisor is a standalone service that provides enterprise decision automation and advice experiences at enterprise scale, and is designed both to augment Oracle Fusion Applications and to be used with on-premises or other cloud applications.

Oracle Cloud Infrastructure provides services that can optionally be used by Oracle SaaS customers to add capabilities beyond the core SaaS application, in areas such as networking, identity management and much more. Every Oracle Cloud account comes with some access to bundled OCI capabilities, for example, for managing the users that will access your Oracle Cloud services.

Oracle Cloud Infrastructure has many different **realms** suitable for different organizations. The commercial realm has data centers in [dozens of locations](#) across the globe. Intelligent Advisor is also available in the [US Government](#), [US Department of Defense](#), and [UK Government](#) realms. Check [the latest documentation](#) for the current list of supported regions.

Oracle Cloud Infrastructure FastConnect provides an easy way to create a dedicated high bandwidth connection between your data center or existing network and all services running in Oracle Cloud. General information is available on [using FastConnect to connect to your on-premises network](#), and on [using it with Oracle SaaS applications](#).

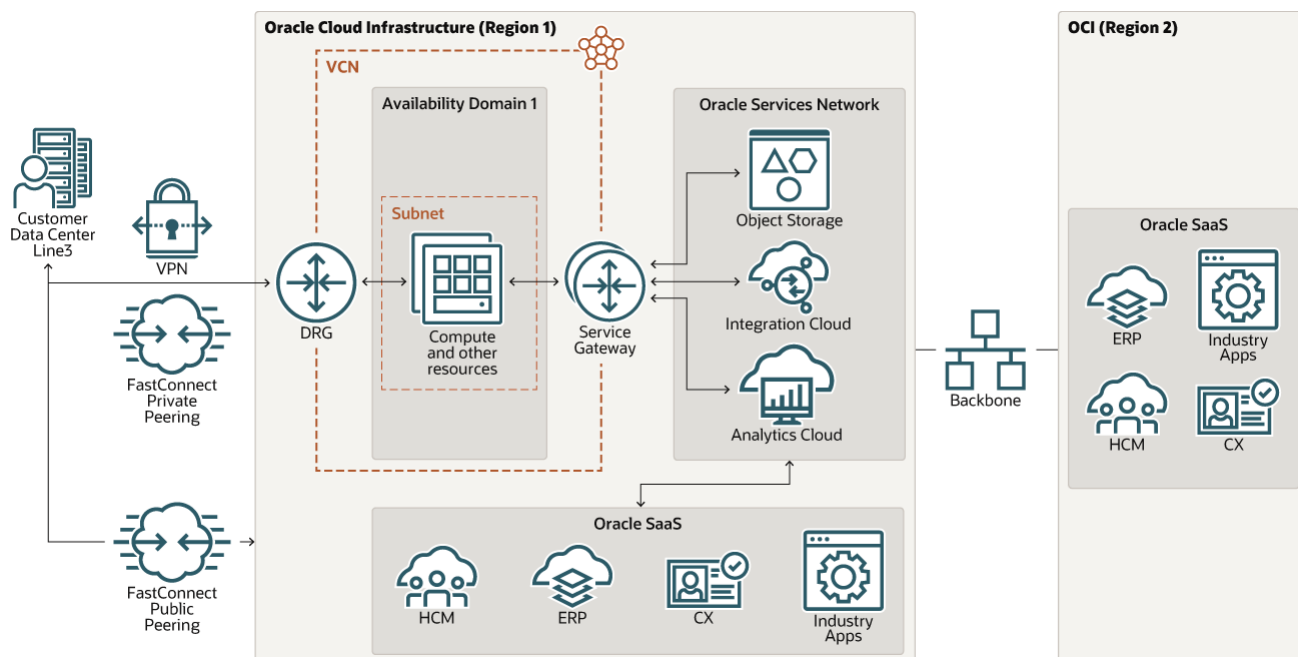
Each subscription to Oracle Intelligent Advisor Cloud Service includes by default **at least three environments**: two test environments and one production environment. Intelligent Advisor Generation 2 environments also include a Studio Hub environment through which all project authoring and most administration is performed. Additional test environments can be added to any Intelligent Advisor Cloud Service subscription.

Each Intelligent Advisor environment provides **three main application services** that may require separate consideration from a network security perspective:

1. **Intelligent Advisor Hub** provides a user interface and REST APIs for manipulating projects assets such as rules and advice flow (interview) definitions, and other system configuration such as application connections and user privileges.
2. **Intelligent Advisor Determinations Server** provides APIs for determining benefit eligibility, assessing risk, calculating payments and making many other decisions, at enterprise scale.
3. **Intelligent Advisor Web Determinations** provides end-user facing experiences that collect data and provide guided advice that is tailored to individual circumstances, including loading and saving information from your other enterprise applications.

Figure 1. Overview of connecting Oracle SaaS applications, such as Intelligent Advisor Cloud Service, to your on-premises or other network. Source:

<https://docs.oracle.com/en/solutions/connect-onprem-net-saas-fastconnect/index.html>



Connecting Securely with Oracle Intelligent Advisor Cloud Service

All Oracle applications and services have security-first design, and follow [Oracle Software Security Assurance](#) processes. For general information on Oracle's SaaS Security practices, see <https://www.oracle.com/security/saas-security/>.

Oracle Intelligent Advisor includes role-based and workspace-based access control for end users that can log in to and work with Oracle Intelligent Advisor projects, configure connections and update user permissions, and for system credentials that can call Hub and Determinations Server APIs.

An Oracle-managed instance of [Oracle Web Application Firewall](#) is in place in front of Oracle Intelligent Advisor to help ensure threats are detected and prevented before they become an issue.

For outgoing connections from Intelligent Advisor (e.g. Web Determinations loading and saving data), standard security options vary by connection type and include basic authentication, OAuth 2.0, mutual TLS and interview user identity pass-through.

Like other Oracle SaaS applications, Oracle Intelligent Advisor is available over the public internet, and requires no specific connection to access. Similarly, all outbound API calls from Intelligent Advisor are routed over the public internet.

For additional levels of performance and control consider options such as the following:

- IP Allow-listing – require incoming requests to Intelligent Advisor to be from specific IP ranges that you nominate. Available in your Intelligent Advisor subscription at no additional cost.
- Custom SSL Certificates – provide dedicated hostnames that you control for any of your Oracle Intelligent Advisor cloud environments. Available in your Intelligent Advisor subscription at no additional cost.
- FastConnect Private Peering – route traffic privately from your on-premises network into your own OCI Virtual Cloud Network (VCN).
- Site-to-Site VPN – use an IPSec connection between your OCI Virtual Cloud Network and your on-premises network.
- OCI Network Firewall – a machine learning-powered firewall with advanced intrusion detection and prevention capabilities, supported by Palo Alto Networks® NGFW technology that scales automatically.

Except as noted above, these and other OCI options may require additional OCI cloud subscription fees to be paid.

Connection Redundancy

When using a single FastConnect connection, any interruption to that connection could prevent you from accessing your services running in Oracle Cloud. Strategies for eliminating this single point of failure include:

- Using multiple FastConnect connections each with a different telecommunications provider
- Using a Virtual Private Network as a slower back-up for a single FastConnect

Your organization's security, networking and cost requirements should be considered when deciding how to approach connection redundancy. For detailed advice on what options are best for your specific circumstances, please contact your Oracle Cloud sales representative who can help connect you with an OCI network specialist.

Incoming Connection Security Considerations

All incoming connections to Oracle Intelligent Advisor Cloud Service use HTTPS, including for:

- Authors and administrators using the Oracle Intelligent Advisor Hub user interface
- End users interacting with the Oracle Intelligent Advisor Web Determinations interview experience
- API calls to Oracle Intelligent Advisor Hub REST APIs
- API calls to Oracle Intelligent Advisor Determinations Server APIs

IP Restrictions

For Oracle Intelligent Advisor Generation 1, you can allow incoming traffic from only certain network IP addresses to be permitted to reach Oracle Intelligent Advisor Cloud Service. These IP address restrictions can be different for each Intelligent Advisor environment, and within each environment for each of the three main services: Hub, Web Determinations and Determinations Server. To set the IP restrictions for an Intelligent Advisor environment, please raise a Service Request with Oracle Support.

For Oracle Intelligent Advisor Gen 2, support for IP restrictions is planned. Check [the latest documentation](#) for availability, and how to configure them.

Custom Hostnames

For Oracle Intelligent Advisor Generation 1, each of your Oracle Intelligent Advisor environments can optionally be configured to have its own custom hostname, using an SSL certificate that you provide. If no such SSL certificate is provided, the host name for each environment is your chosen site name followed by *.custhelp.com*. For example, *mysite.custhelp.com*. To configure an SSL certificate for your Intelligent Advisor Generation 1 environment, use the Oracle Service Cloud Configuration Assistant, as outlined in [the product documentation](#).

For Oracle Intelligent Advisor Generation 2, support for custom hostnames is planned. Check [the latest documentation](#) for availability and how to configure one. Without a custom hostname, Generation 2 environment names are your chosen site name followed by *.cxia.ocs.<oci-realm-suffix>*. For example, *mysite.cxia.ocs.oraclegovcloud.com* or *mysite.cxia.ocs.oraclegovcloud.uk*.

Private Routing

Traffic to Intelligent Advisor Cloud Service from other OCI services hosted **in the same OCI region** will not be routed over the public internet.

If you prefer incoming traffic to Intelligent Advisor from your on-premises or other cloud environment not to be routed over the public Internet, you can use services and configuration in your own OCI tenancy to configure the route that traffic takes. For example:

- Use FastConnect Private Peering to connect your on-premises network to a VCN in your own OCI tenancy

- Use services such as OCI Network Load Balancer, OCI Network Firewall and OCI NAT Gateway to control and route requests via your OCI tenancy from your on-premises network to your Oracle Intelligent Advisor environments

For detailed advice on what options are best for your specific circumstances, please contact your Oracle Cloud sales representative who can help connect you with an OCI networking specialist.

Outgoing Data Security Considerations

All outgoing API calls made by Oracle Intelligent Advisor Cloud Service use HTTPS. This includes all interview connections that load data from and save data to any location outside Intelligent Advisor, according to your application configuration:

- SOAP Web Service Connections
- Interview Extension REST Connections
- Oracle Fusion Sales, Service and HR Help Desk connections
- Oracle Integration Cloud connections
- Generic Integration Protocol connections

Depending on the connection type, Oracle Intelligent Advisor provides OAuth 2.0, mutual TLS and other connection options that you configure, so that requests to your data endpoints are processed only if they are correctly authorized.

Private Routing

Traffic from Oracle Intelligent Advisor to Oracle Integration, Oracle Fusion Applications and other services hosted **in the same OCI region** will not be routed over the public internet.

To route outgoing traffic to your on-premises endpoints privately via your OCI tenancy, Local Peering needs to be established between the tenancy in which your Oracle Intelligent Advisor Cloud Service is hosted and your OCI VCN. This is a specialized option available only on request that requires coordination between your networking team and the Oracle SaaS cloud operations team. You will also need to configure your own OCI tenancy and services according to your specific needs.

For detailed advice on what options are best for your specific circumstances, please contact your Oracle Cloud sales representative who can help connect you with an OCI network specialist.

Data Security at Rest

Oracle Intelligent Advisor Cloud Service only stores:

- Business rules and advice interviews
- Configuration of integrations with other applications
- Users, workspaces, permissions and other application configuration
- Audit trail for access to and changes made to the above

All this information is encrypted at rest within the Oracle Intelligent Advisor application.

Oracle Intelligent Advisor Cloud Service does not store end user data that flows through any decision service or interview developed by you. All such data are accessible only to your developed decision services and interviews. For example:

- Information sent to Determinations Server APIs to assess an individual's eligibility for some benefit is used only for the purposes of making that assessment and is discarded once that assessment has been made.
- Information collected in an interview to form a Know Your Customer risk assessment is held only for the purposes of completing that advice experience and is discarded after the interview session is completed.

Summary

Oracle Intelligent Advisor Cloud Service provides enterprise-level security out of the box for connecting to your on-premises environment. If you have specific performance and security needs, additional options are available that involve the use of other OCI services.

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