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## **Oracle Policy Automation Connector For Siebel 10.3.0 – Features and Benefits**

September 2011

# Using OPA with Siebel



## Why?

Keep business logic separate from Siebel:

- ✓ Make rule changes while system is up
- ✓ Easily testable, and auditable
- ✓ Visible to policy owners
- ✓ Simplify Siebel upgrades
- ✓ Share with other systems, and across multiple channels

Result: Happier users, and better agility!

## How?

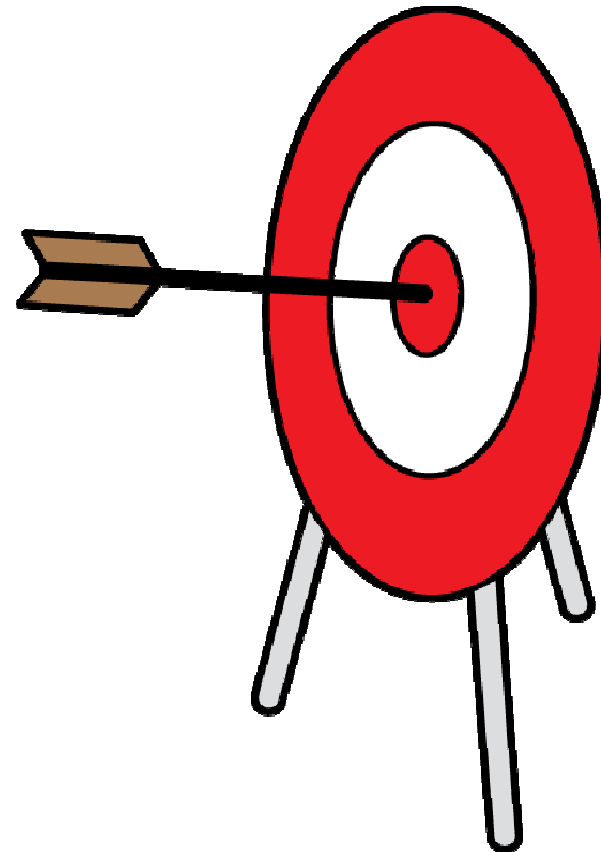
Use OPA Connector, with standard Siebel tools:

- Model policies using Oracle Policy Modeling
- Deploy models to Oracle Policy Automation
- OPA web service for in-line decisions
- Rich interactive guidance in Siebel UI, or public-facing with Siebel update
- Capture and view decision reports in Siebel

Power: Highly scalable, and flexible integration

# Introducing OPA Connector for Siebel 10.3

- Highlights include:
  - ✓ **Siebel Integration Object Handling**
    - ✓ Pass Siebel Data efficiently to OPA
    - ✓ Directly update Siebel with results from OPA
  - ✓ **New Decision Report Viewer**
    - ✓ Rendered as HTML applets
    - ✓ Stored as XML for effective auditing
  - ✓ **Improved Active Business Object handling \***
    - ✓ Full support for record validation scenarios



\* Requires a separate installation step



## Why upgrade to OPA Connector for Siebel 10.3?

- Enhancing Siebel with **OPA** determinations and interviews is **easier, quicker** and therefore **cheaper** than ever before
  - Integrate without needing to write any script
  - Embed, customise and display decision reports OOTB
  - Update Siebel with the results
  - Utilise the same mappings for both interviews and determinations
  - Reduce overall Siebel script by 50%\*
- **Full support** for existing **Business Object mappings**
  - Use for initial integration whilst rulebase is still under development
  - Easily migrate to Integration Object mapping when rulebase ready for production and gain optimal performance
- **Decision reports** display as an easy-to-navigate applet in Siebel, giving clear justification for decisions

\* Based on a deployment relying on scripting for business logic



# Oracle Policy Automation Connector for Siebel



Oracle Policy Modeling

Export mapping meta-data

Deploy

Oracle Policy Automation runtime components

Export mapping meta-data

## Views

OPA Mapping for either Business Object or Integration Object

Embedded Interviews

Saved Interview Sessions

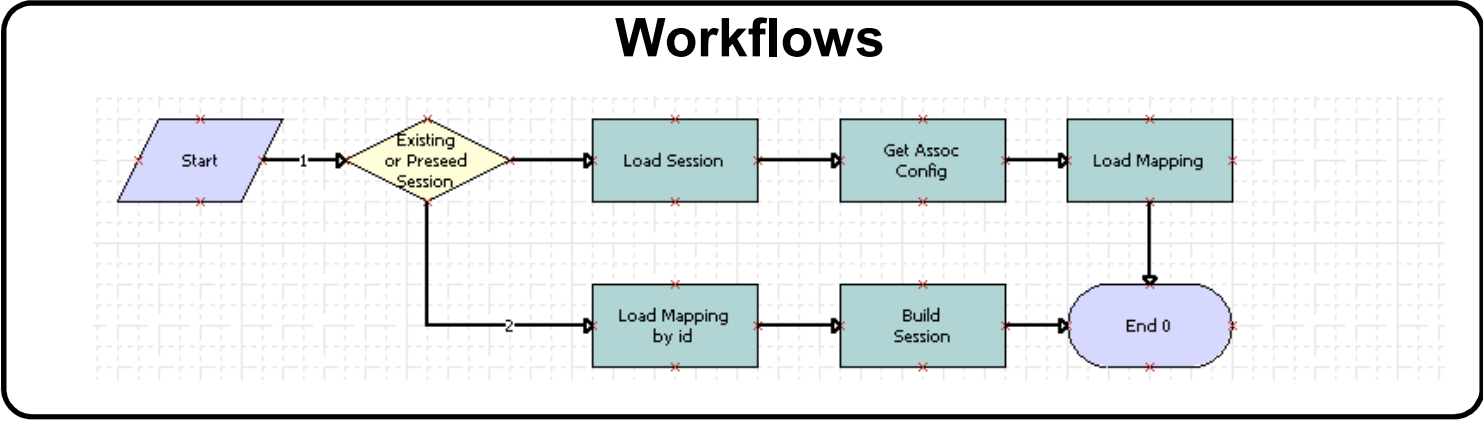
Decision Report Viewer

## Business Components

Inbound

Outbound

Web Services



## EAI Components

Integration Objects containing OPA mappings



## **Integration Object Handling**

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Decision Report Viewer

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Active Business Object Handling Improvements

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Other Enhancements

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# Integration Object Mapping – Generate Mapping

## First step

- Export definition, XSD, of existing Integration Object from Siebel Tools

or

- Create or modify an existing Integration Object to include the User Properties to allow OPA to map data

The screenshot shows the Siebel Tools interface. The main window is titled "Siebel Tools - Siebel Repository - [Integration Objects]". The "Object Explorer" on the left shows a tree view of Siebel Objects, including Integration Object. The "Integration Object List" table is visible, with a red box around the "Synchronize" button. A red arrow points from the "Synchronize" button to the "Integration Object List" table.

W	Name	Changed	Project	Adapter Info	Base Object Ty
>	HLS Case OPA IO	✓	Policy Automation Smoke Test		Siebel Business

# Integration Object Mapping – Generate Mapping

## First step

- Export definition, XSD, of existing Integration Object from Siebel Tools

then

- Import into Oracle Policy Modeling
- Author rules directly against the Siebel Data Model
- At runtime data can be auto-mapped to rulebase attributes

Modeling - ListOfPolicyAutomationBenefitPlanCase.xsrc

Tools Help

- Launch Mass Case Tester
- Clean Up Unused Attributes...
- Compile All
- Repair Attribute References...
- Update Oracle Policy Modeling Templates...
- Siebel**
- Options...

Siebel.xint ListOfPolicyAutomationBenefitPlanCase.xsrc

Entities

- Global
  - contact
    - fin contact income
    - hls case\_contact
    - pub case benefit plan
      - plan line item
      - pub case benefit plan payments

Attributes Relationships

Entity 'global': 19 of 19 attributes.

ID	Model ID	Data Type
ApplicationContactId	ApplicationCo...	Text
ApplicationId	ApplicationId	Text
ApplicationNum	ApplicationNu...	Text
CaseNum	CaseNum	Text
City	City	Text
Created	Created	Text
EligibilityText	EligibilityText	Text
EligibleFoodstampsBenefit	EligibleFoods...	Boolean
GoalDescription	GoalDescripti...	Text

# Integration Object Mapping – Generate Mapping

## First step

- Export definition, XSD, of existing Integration Object from Siebel Tools

or

- **Create or modify an existing Integration Object to include the User Properties to allow OPA to map data**

The screenshot displays two side-by-side windows in Siebel Tools. The left window, titled 'Integration Component User Props', shows a table with columns 'W', 'External Name Context', and 'Name'. The right window, titled 'Integration Component Field User Props', shows a table with columns 'W', 'Name', 'Changed', and 'Data Type'. Below these are two more tables: one for 'OPAEntity' and one for 'OPAAttribute'.

W	External Name Context	Name
	Contact	Contact
	HLS Case	HLS Case
>	PUB Case Benefit Plan	PUB Case Benefit Plan
	PUB Case Benefit Plan Line Item	PUB Case Benefit Plan Line

W	Name	Changed	Data Type
>	Comments	✓	DTYPE_TEXT
	Plan Expiry Date	✓	DTYPE_DATE
	Plan Name	✓	DTYPE_TEXT
	Plan Start Date	✓	DTYPE_DATE

W	Name	Changed	Value
>	OPAEntity	✓	BenefitPlan

W	Name	Changed	Value
>	OPAAttribute	✓	PlanComments
	OPAOutcome	✓	value-only

Use Integration Object Component and Field User Properties to Map Entity and Attribute Names

# Integration Object Mapping – High Level Mapping

- Declare a simple Integration Object Mapping in Siebel
  - Mapping entry for both Web Determinations and Determination Server
  - One Integration Object contains both mapping of data to be sent to OPA and of outcomes to be mapped back to Siebel
  - Allows multiple mappings for a rulebase
  - Use IO search specs to change rows selected without needing repository changes

The screenshot displays the Siebel Public Sector interface. At the top, there is a title bar with the Siebel logo and the text 'Siebel Public Sector'. Below this is a menu bar with options: File, Edit, View, Navigate, Query, Tools, Help. A toolbar with various icons is visible below the menu bar. The main content area shows a breadcrumb trail: Home | Calendar | Cases | Contacts | Incidents | Service | Evidence | Leads | Applications | Administration - Policy Automation | Policy Automation Smoke T. Below the breadcrumb trail, there are links for Mappings, IO Mappings, Decision Reports, Sessions, Web Determinations, Decision Report List, and Decision Rej. The main content area is titled 'Policy Automation Mappings IO List Applet' and contains a table with the following data:

Mapping Name	Integration Object	Integration Object ID Field	Port Name	Rulebase Name	Save Session	Integration Object Search Spec
> AdminSmokeTestIO	Policy Automation Employee	Employee.Id	AdminSmokeTestIO	AdminSmokeTest	N	
AutismFundingIO	HLS Case OPA IO	HLS Case.Id	AutismFunding	AutismFunding	N	

# Integration Object Mapping – Runtime

- Simple configuration of the OPA Runtime allows both Determination Server and Web Determinations to natively handle the Siebel Integration Objects
- Any Goals or Inferred Attributes mapped in the IO definition will automatically be populated
- The populated IO can then be applied back to Siebel.
- For example a populated Benefit Plan with Benefit detail can update a Case with values determined in the rulebase

Values inferred in the rulebase

```
<?xml version="1.0" encoding="UTF-8" ?>
<SiebelMessage MessageId="" MessageType="Integration Object" In
<OpaIO>
- <HlsCase>
  <Id>2-13XR</Id>
  <SubjectContactId>2-KKZ</SubjectContactId>
- <ListOfContact>
  - <Contact>
    <Id>2-KKZ</Id>
    <DateOfBirth>12/12/1967</DateOfBirth>
    <FirstName>Frankie</FirstName>
    <LastName>Hampshirer</LastName>
    <MiddleName>test</MiddleName>
  </Contact>
</ListOfContact>
- <ListOfPubCaseBenefitPlan>
  - <PubCaseBenefitPlan>
    <Comments />
    <PlanExpiryDate>12/31/2012</PlanExpiryDate>
    <PlanName>Autism 6-18</PlanName>
    <PlanStartDate>08/18/2011</PlanStartDate>
    <ProgramName>Autism - FH 6-18</ProgramName>
    <Status>Eligible</Status>
  - <ListOfPubCaseBenefitPlanLineItem>
    - <PubCaseBenefitPlanLineItem>
      <BenefitAmount>8500</BenefitAmount>
      <EffectiveDate>08/18/2011</EffectiveDate>
      <ExpirationDate>12/31/2012</ExpirationDate>
      <Frequency>One Time</Frequency>
      <Name>Autism</Name>
      <Status>Eligible</Status>
    </PubCaseBenefitPlanLineItem>
    - <PubCaseBenefitPlanLineItem>
      <BenefitAmount>8500</BenefitAmount>
      <EffectiveDate>08/18/2011</EffectiveDate>
```

# Integration Object Mapping – Summary of Benefits

- Map Siebel data to and from OPA Data via Integration Objects
- Improved speed and reliability
- Easily map OPA results back to Siebel data
- Dramatically reduces the amount of time to integrate OPA and Siebel
- Integrate OPA without writing a single line of eScript
- Consistent approach for Web Determinations and Determinations Server
- Provides linked decision reports and Siebel-storulebase sessions (only for Web Determinations)



Integration Object Handling

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 **Decision Report Viewer**

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Active Business Object Handling Improvements

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Other Enhancements

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# Decision Report Viewer – Define outcomes

- **Define an OPAOutcome Value as decision-report in the Integration Object**

- You can request decision reports for any attribute in any entity
- Only if the Attribute is known will the decision report be returned
- Planning is needed to get the best set of decision reports to cover the auditing requirements
  - Often a single decision report for the whole determination ( for the global entity) will give the best audit

The screenshot shows the 'Integration Component Field User Props' window. It contains two tables. The top table lists attributes with their data types, and the bottom table lists OPAAttribute and OPAOutcome values.

W	Name	Changed	Data Type
>	Benefit Amount	✓	DTYPE_CURRENCY
	Effective Date	✓	DTYPE_DATE
	Expiration Date	✓	DTYPE_DATE
	Frequency	✓	DTYPE_TEXT

W	Name	Changed	Value
>	OPAAttribute	✓	BenefitAmount
	OPAOutcome	✓	decision-report

# Decision Report Viewer – List

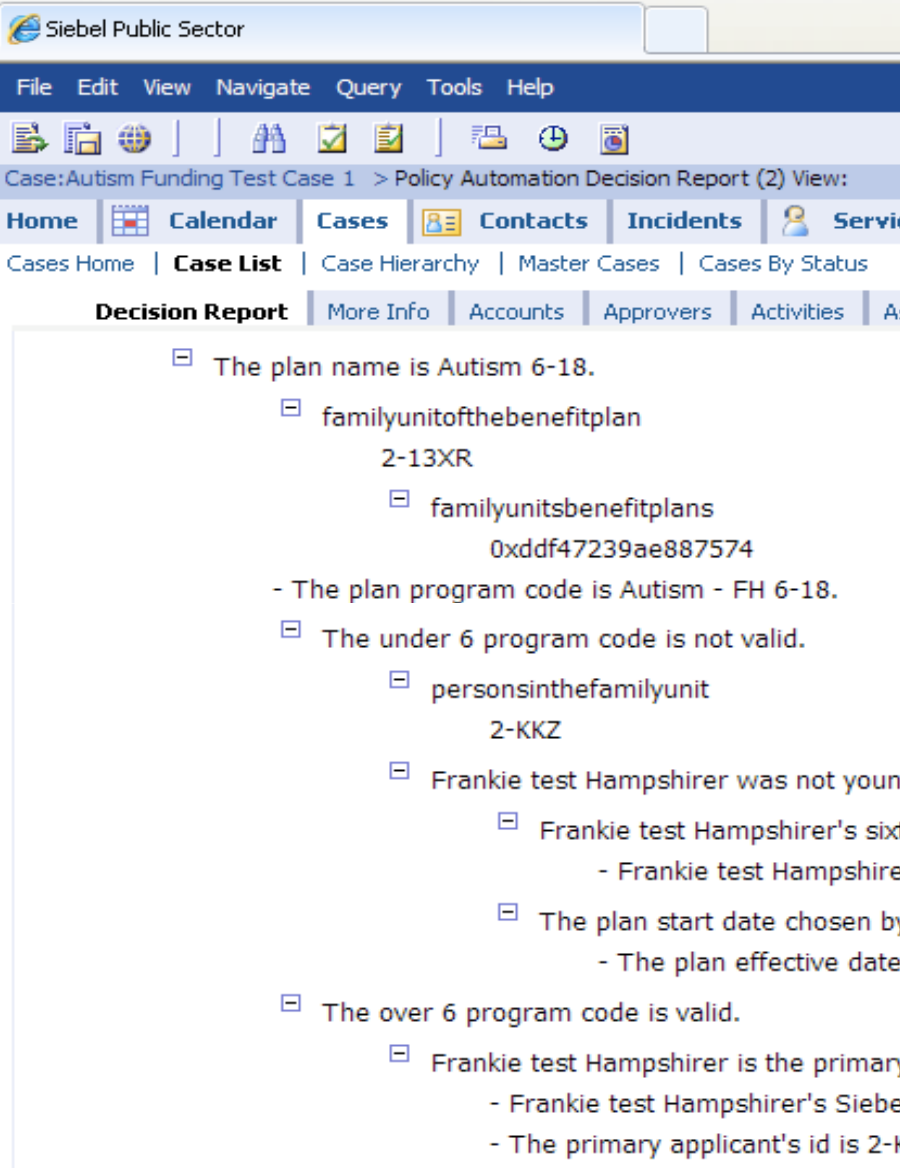
- A view is available showing all decision reports available
- Administrators can query on the mapping and record to find required decisions across all components and fields
- A drilldown link on Id allows users to view individual reports
- Allows decision reports to be linked to each of the appropriate Siebel Objects
  - e.g. HLS Case, Pub Case Benefit Plan and Plan Line Item

[Mappings](#) | [IO Mappings](#) | [Sessions](#) | [Web Determinati](#)

Decision Reports					
Menu ▾   Query					
Id	Configuration Name	Object Name	Object ID	Field Name	xml
> 2-17D6	AutismFundingIO	PUB Case Benefit Plan	2-13XR	Plan Expiry Date	<decision-report report-s
2-17IT	AutismFundingIO	PUB Case Benefit Plan Line Item	2-17YU	Status	<decision-report report-s
2-17IU	AutismFundingIO	PUB Case Benefit Plan Line Item	2-17YU	Benefit Amount	<decision-report report-s

# Decision Report Viewer – Add to your Business Object

- Decision reports can easily be added to your screens
- For example a copy of the Decision Report Viewer has been added to HLS Case so the overall decision for this case can be viewed with the case detail
- Storage for all Decision Reports is in one table (added by the Connector) which simplifies audit and archiving requirements

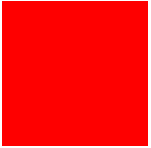


The screenshot displays the Siebel Public Sector interface. The browser title is 'Siebel Public Sector'. The menu bar includes 'File', 'Edit', 'View', 'Navigate', 'Query', 'Tools', and 'Help'. The breadcrumb trail is 'Case:Autism Funding Test Case 1 > Policy Automation Decision Report (2) View:'. The navigation tabs include 'Home', 'Calendar', 'Cases', 'Contacts', 'Incidents', and 'Service'. Below the tabs, there are links for 'Cases Home', 'Case List', 'Case Hierarchy', 'Master Cases', and 'Cases By Status'. The main content area is titled 'Decision Report' and contains a tree view of decision items:

- [-] The plan name is Autism 6-18.
  - [-] familyunitofthebenefitplan
    - 2-13XR
      - [-] familyunitsbenefitplans
        - 0xddf47239ae887574
          - The plan program code is Autism - FH 6-18.
  - [-] The under 6 program code is not valid.
    - [-] personsinthefamilyunit
      - 2-KKZ
        - [-] Frankie test Hampshirer was not young
          - [-] Frankie test Hampshirer's sixt
            - Frankie test Hampshire
          - [-] The plan start date chosen by
            - The plan effective date
  - [-] The over 6 program code is valid.
    - [-] Frankie test Hampshirer is the primary
      - Frankie test Hampshirer's Siebe
      - The primary applicant's id is 2-k

## Decision Report Viewer – Summary of Benefits

- Performance enhancements
- Dynamic HTML display
- Ability to customize the decision report style via XSLT
- Decision reports stored as XML so they can be reused for BI Publisher report generation
- Automatic linking to the records in the Siebel data model
- All decision reports efficiently stored in a single table



Integration Object Handling

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Decision Report Viewer

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 **Active Business Object Handling Improvements**

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Other Enhancements

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# Active Business Object Handling Improvements

- Call the Connector to decide if a SR can be closed considering the current state (i.e. not yet saved) of the SR and also of the child Activities and Activity Plans
- Pre-write record and pre-set field events in Siebel can now send the Active Business Object and child business component data to the rulebase determination
- Simplifies complex record validation

The screenshot displays the Siebel CRM interface. At the top, there are navigation tabs: Evidence, Leads, Applications, and Administration - Poli. Below these are links for Request Charts, Service Requests - HelpDesk, and Agent Charts. A 'Verify Best Time' button and a 'Create Case' button are visible. The 'Status and Ownership' section shows a dropdown menu for 'Status' with options: Open, Pending, Closed, Cancelled, Exception Hand, Quoted, In Progress, Completed, Submitted, and Approved. Below this is a table with columns: Planned Start, Template, and Description. The table contains one row: 20/07/2011 07:46:2 Impound, Activity Template for Vehicle Impound. Below the table is an 'Activities' section with a table containing columns: Activity #, Type, Description, Planned Start, Duration, Priority, and Status. The activities table has five rows:

Activity #	Type	Description	Planned Start	Duration	Priority	Status
2-ZKU	Call - Outbound	Call Customer	20/07/2011 07:46:2			Submitted for Approval
2-ZL6	Letter - Outbound	Send Cure Letter	20/07/2011 07:46:2			Closed
2-ZKX	Call - Outbound	Call Repair Shop or I	20/07/2011 07:46:2			Closed
2-ZL0	Letter - Outbound	Send Package to Re	20/07/2011 07:46:2			Closed



Integration Object Handling

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Decision Report Viewer

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Active Business Object Handling Improvements

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 **Other Enhancements**

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## Other Enhancements

- Full support maintained for existing Business Object Mappings
- Upgrade to use version 10.3 of the OPA runtime
- Many **resolved issues**, including;
  - Temporal data in the Session now correctly stored
- **Business Object Mapping improvements**
  - Incorporates new decision report functionality
  - Allows multiple mappings for a rulebase

# Should I use OPA for Everything?



- Do use OPA:

- ✓ For complex rules that may change frequently, such as payment amounts, eligibility determinations, contracted billing or service agreements
- ✓ When you need to prove how decisions were made
- ✓ If business users need to easily change interactive guidance questions or interview flow

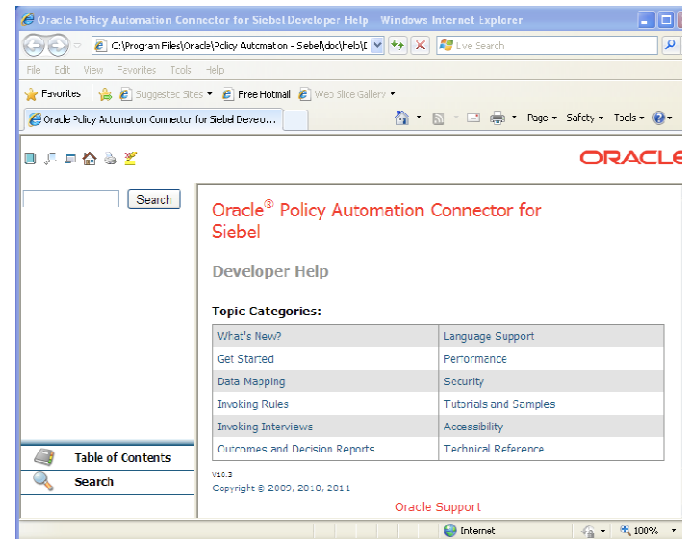
- Don't use OPA:

- ✗ For simple form validations
- ✗ For rules that will never change
- ✗ If built-in Siebel tools can easily meet the need, such as for simple data capture flows
- ✗ For technical logic that won't benefit from being managed as documents

## More Information

### It's easy!

- Step-by-step guides to using the new functionality can be found in the Connector Help



- The OPA Forums are always open for your questions and comments, we love to hear from you!
  - External on OTN:  
<http://forums.oracle.com/forums/forum.jspa?forumID=828>
  - Oracle employees:  
<http://myforums.oracle.com/jive3/forum.jspa?forumID=3918>