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
Key focus for the 10.3 Connector

Simple Implementation and Performance

- Reduced scripting by use of native IO framework
  - Simple mapping for OPA
  - Automated update of Siebel
- Full support maintained for Business Object approach
- Scalability and performance improved
  - Mappings cached in OPA
  - Fast read and update of Siebel through IOs

Auditing and Decision Reporting

- XML decision reports
  - Faster to store and retrieve
  - Improved display
    - ability to filter content to just the relevant parts
    - use customizable stylesheets for rich HTML output
    - easy to use with BI Publisher

Private Sector Industry Support

- Use OPA for complex validation scenarios
- Active Business Object querying now can cover all scenarios
- Enhancement to the standard Business Object approach

ORACLE
Oracle Policy Automation Connector for Siebel

Views
- Embedded Interviews
- Saved Interview Sessions
- Decision Report Viewer

Business Components

Workflows
- Start
- Load Session
- Get Assoc Config
- Load Mapping
- Load Mapping by ID
- Build Session
- End 1

EAI Components
- Integration Objects containing OPA mappings

Oracle Policy Automation Modeling
- Export mapping metadata
- Deploy

Oracle Policy Automation runtime components
- Inbound
- Outbound
- Web Services
Integration Object Handling

- Decision Report Viewer
- Active Business Object Handling Improvements
- Other Enhancements
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
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
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

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
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
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

Decision Report Viewer

Active Business Object Handling Improvements

Other Enhancements
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
**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

<table>
<thead>
<tr>
<th>Id</th>
<th>Configuration Name</th>
<th>Object Name</th>
<th>Object ID</th>
<th>Field Name</th>
<th>xml</th>
</tr>
</thead>
<tbody>
<tr>
<td>2-17D6</td>
<td>AutismFundingIO</td>
<td>PUB Case Benefit Plan</td>
<td>2-13YR</td>
<td>Plan Expiry Date</td>
<td>&lt;decision-report report-s</td>
</tr>
<tr>
<td>2-17IT</td>
<td>AutismFundingIO</td>
<td>PUB Case Benefit Plan Line Item</td>
<td>2-17YU</td>
<td>Status</td>
<td>&lt;decision-report report-s</td>
</tr>
<tr>
<td>2-17IU</td>
<td>AutismFundingIO</td>
<td>PUB Case Benefit Plan Line Item</td>
<td>2-17YU</td>
<td>Benefit Amount</td>
<td>&lt;decision-report report-s</td>
</tr>
</tbody>
</table>
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
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
Decision Report Viewer

Active Business Object Handling Improvements

Other Enhancements
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.
Integration Object Handling
Decision Report Viewer
Active Business Object Handling Improvements
Other Enhancements
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!
  • Oracle employees: http://myforums.oracle.com/jive3/forum.jspa?forumID=3918