ORACLE POLICY AUTOMATION
Newsletter
Summer 2016

ORACLE CONSULTING TEAM (EUROPE) – SUMMER 2016   IN THIS ISSUE

OPA Accelerator Update

by Rob Bradford & Sean Reardon

As you may remember from previous newsletters, Oracle Consulting have modelled a number of pre-built accelerator solutions, allowing customers to quickly get started with rulebases created using standard policies and legislation, built to best standards by highly experienced rule authors.

The **Gifts and Entertainment accelerator** has been created to assist compliance. The accelerator brings together OPA and Oracle Service Cloud to provide a full end to end process from submitting a request for approval (creating an incident), through to review of that request being reviewed by an authorised member of staff (managed from within the agent desktop). The accelerator ensures that consistent rules are applied at all points in the process however allows for different levels of evidence to be required for each different deployment. Work is ongoing to refine this accelerator.

The **HR accelerator** includes 10 core processes based on UK legislation, including complex calculations such as Shared Parental Leave, maternity and paternity. We have continued to refine and update the policies.

The solution has been adopted by a number of customers (including Oracle UK!), and is proving very popular - especially as part of an HR helpdesk package with other CX Cloud products.

The **Financial On-boarding accelerator** is designed to simplify the on-boarding process for new customers, providing a streamlined interview based on industry standards.

If you would like more information on any of the accelerators, or even have any ideas for new ones which would support your business, please contact Thomas Filmer.

The **Right to Work accelerator** (new!) provides business with assurance that any prospective employee is allowed to work in the UK, therefore helping to avoid a £20,000 fine for each illegal worker employed. Based on UK policy and legislation, the accelerator is fully integrated with Oracle Service Cloud - allowing employers to upload and retain copies of documents, digital signatures and audit reports for each case.

OPA May New Features

The new May 2016 release has some exciting new features developed from feedback and experience on previous and current projects. Find out more on … page 2.

OPA Enablement Update

Our OPA SmartStart enablement team gives us an update of the enablement training for v12 … page 2.

OPA v12 Quick Tip

As more and more clients move towards v12, we have highlighted a quick tip to save time and effort in rule authoring … page 2.

OPA to Siebel connector

With many clients continuing to use Siebel, we look at the different connectors available to differing versions … page 2.

OPA Enablement Update

by Rob Bradford

OPA product releases are now every three months, so we are constantly reviewing and updating our v12 training to incorporate the latest features. In recent months this has included creating new material around interview enhancements, hub collaboration, value lists, testing spreadsheets and more. We are also developing a new course around integrating OPA with Oracle Service Cloud, allowing you to create dynamic interviews for customers and agents alike who load and save information to and from Service Cloud using the built in connector. Finally, the team are heavily involved in the ongoing creation of a new Oracle University exam, which will be the official certification for OPA implementation specialists.

As a reminder, Oracle Consulting offer a range of standard and bespoke training courses which can be conducted either at customer sites or using our Oracle offices - we have training locations throughout the country. Our most popular courses are:

- OPA v12 rule author foundation (5 days)
- OPA v12 rule author advanced (5 days)
- OPA v12 with BI publisher (2 days)
- OPA v12 project manager (2 days)

OPA May 2016 New Features

by Jonathan Watson

Cloud production sites have recently been upgraded (June 17th) to the May version of OPA. To see what's available go to the help link available in OPM, all the new features are listed. Here are some of the highlights:

Interview Checkpoints - if you have OPA deployed alongside Service Cloud then you can make use of checkpoints that allow logged in customer portal users to resume unfinished sessions. This is very useful for complex OPA interviews, interviews where the user may need to go and find some information not immediately at hand, or where they switch devices for example by starting an interview in the office and then completing it on a tablet whilst at a customer site.

New or existing contact

A single OPA interview can now be deployed for both logged-in customer portal contacts and unknown users. For the former the existing contact will be updated, for the latter a new contact will be created; for both you can of course create incidents or any other records.
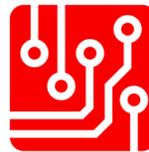
Signatures to generated forms

Signatures collected during OPA interviews can now be sent through to generated forms. This is useful, for example, when the customer needs to print out and send off an application.

Have a look at the OPM help or, even better, have a play!

OPA to Siebel Connector

by Ian Clough

Starting with Innovation Pack (20)15, patch 5, Siebel has a built in integration with OPA 12.x which includes:

- Calling the OPA Answer service to make policy determinations
- Fully embedded OPA interview where Siebel OpenUI renders the OPA screens
- There is no support for OPA Web Determinations which is superseded by the fully embedded interviews.

There is no longer a separate Siebel connector for OPA 12.

The new Siebel integration is developed, documented and supported by the Oracle Siebel team.

Some customers wish to move to an OPA 12 cloud architecture but are unable to upgrade Siebel at the same time. To assist these customers Oracle Consulting in cooperation with the OPA product team are making available a sub-set of the Siebel IP 15 p5 - OPA 12 integration available to Siebel 8.x customers packaged as a consultancy service.

The Siebel 8.x OPA 12 integration will include:

- Calling the OPA Answer service from a Siebel workflow

- Integrating OPA interviews into Siebel screen using an iFrame
- It will not include fully embedded OPA interviews as these would require Siebel OpenUI.

This service provides the option for customers to move to OPA cloud without the pre-requisite of upgrading Siebel which is still the recommended longer term solution.

OPA v12 Quick Tip

by Rob Bradford

Most rule authors know about using substitution on screens to personalise an OPA interview, for example to refer to a customer, or business by name. What may be less well known is that it is also possible to use the same substitution principles in validation rules, which may be especially useful when dealing with multiple entities, for example children.

Error("Entered age for %person_name% can not be in the future!") if the person's date of birth > the interview date

Entered age for Andrew can not be in the future!

Name:	Date of birth:		
Jim	12/6/06	📅	Remove
Andrew	18/6/16	📅	Remove
Claire	1/9/11	📅	Remove

Diary Dates

21st & 22nd September 2016 – OPA Cross Government Rule Author and Executive meetings (Coventry & London)