COE Intake- BRE Documentation

Objective

Document BRE design and logic for making platform recommendations.

Decision Matrix -

COE Intake Decision Matrix is uploaded under docs in the Github Repo.
The input/output of the decision matrix can be modified based on your specific requirements and needs.

Description: The COE Intake Matrix outlines all the different permutations of the input parameters with the respective output. The following fields from Intake records are the input parameters:

- Is business process automations needed
  - The values Yes/No are converted to 1,0 via a formula field (API Name: coe_Review_Score_Automations__c)
  - A roll-up summary field calculates a total value (API Name: coe_Total_Automations__c)
  - *An average is taken based on the number of reviews and rounded to the nearest integer (API Name: coe_Avg_Automations__c)
- Recommendation
  - The values Yes/No are converted to 1,0 via a formula field (API Name: coe_Review_Score_Recommendation__c)
  - A roll-up summary field calculates a total value (API Name: coe_Total_Recommendation_Value__c)
  - *An average is taken based on the number of reviews and rounded to the nearest integer (API Name: coe_Avg_Recommendation_Value__c)
- Does an App for this Use Case exist
  - The values Yes/No are converted to 1,0 via a formula field (API Name: coe_Review_Score_App_Exists__c)
  - A roll-up summary field calculates a total value (API Name: coe_Total_App_Exists_Value__c)
  - An average is taken based on the number of reviews and rounded to the nearest integer (API Name: coe_Avg_App_Exists_Value__c)
- Does Platform support Integration needs
  - The values Yes/No are converted to 1,0 via a formula field (API Name: coe_Review_Score_Integration__c)
  - A roll-up summary field calculates a total value (API Name: coe_Total_Integration_Needs__c)
  - An average is taken based on the number of reviews and rounded to the nearest integer (API Name: coe_Avg_Integration_Needs__c)
- Does the use case need collaboration
  - The values Yes/No are converted to 1,0 via a formula field (API Name: coe_Review_Score_Collaboration__c)
  - A roll-up summary field calculates a total value (API Name: coe_Total_Collaboration_Need__c)
  - An average is taken based on the number of reviews and rounded to the nearest integer (API Name: coe_Avg_Collaboration_Need__c)
- Is Mobile Access needed
  - The values Yes/No are converted to 1,0 via a formula field (API Name: coe_Review_Score_Mobile_Access__c)
  - A roll-up summary field calculates a total value (API Name: coe_Total_Mobile_Access__c)
  - An average is taken based on the number of reviews and rounded to the nearest integer (API Name: coe_Avg_Total_Mobile_Access__c)

- Can this App use an existing platform
  - The values Yes/No are converted to 1,0 via a formula field (API Name: coe_Review_Score_Existing_Platform__c)
  - A roll-up summary field calculates a total value (API Name: coe_Total_Existing_Platform__c)
  - An average is taken based on the number of reviews and rounded to the nearest integer (API Name: coe_Avg_Total_Existing_Platform__c)
- Will an ATO be required
  - The values Yes/No are converted to 1,0 via a formula field (API Name: coe_Review_Score_ATO__c)
  - A roll-up summary field calculates a total value (API Name: coe_Total_ATO__c)
  - An average is taken based on the number of reviews and rounded to the nearest integer (API Name: coe_Avg_ATO__c)

*Input parameters for BRE.

Expression Set (API Name: COE_Intake_Decision_Matrix)

*Please note that you do not need an expression set for this specific scenario. You can directly call the decision matrix into your omniscript. However, the goal of this accelerator is to show how an omniscript can leverage an expression set.

This expression set is very simple as it does not perform any calculations, but rather has a Lookup table with a calculation with the output parameter of the Lookup table.
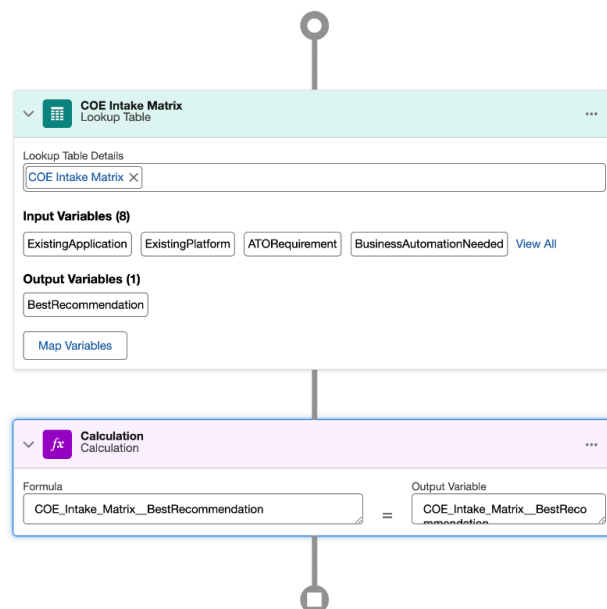
Omniscript- COE/BRERecommendation

This Omniscript is composed of the following components:

- Data Raptors
  - COEIntakeExtractDR: This data raptor is extracting the Intake record and input parameters for the expression set
  - COEBREInputTransformDR: This data raptor is transforming output parameters from the expression set (JSON) into a legible format
- Expression Set (API Name: COE_Intake_Decision_Matrix)
- Step (COE_BREOutput)
  - The Step is displaying the output from the expression set along with the Preferred Platform from the Intake record.
- The Navigation Action at the end allows you to restart the Omniscript for recalculations if there are any changes to the input parameters