OPX Virtual Folders

Transform your digital operations with OPX

Overview

OPX Virtual Folders allows you to associate case data from externally held systems with the OPX business object cases being processed.

In a similar manner to the lightweight integration OPX has of using stub data to represent the 'index information' into your core system business objects (such as having a customer's account number as a way of finding your customers in your core systems or policy number to find the full policy details on your core system), the Virtual Folders features allow you to access data about the case from your system. For example:

- enterprise content management system
- enterprise email system
- enterprise document repository(s)
- enterprise voice recording system
- chat solution

How does it work?

A service request results in a case going through the OPX process. This case has information about the service request as well as about the business object(s) associated with the service request. This meta-data can be used to assemble an index into the system of records. OPX will search these on demand using the index, and gather the data showing a list of entries. The user will then be able to click on links to retrieve and view the information while working through the case in OPX.

Virtual Folders work with a simple file system out of the box but can be expanded to your chosen mechanism. Very minimal development is required. We think of it as the *glue* required to talk to your system. This is because each system may be set up differently for authentication and authorisation. There are rarely more than a couple of days effort required to set up and agree on the security approach with your team. The *glue* and effort to make it work for you is handled by our team.

What are the benefits?

OPX has a history of customer service requests for the current case as well as for associated cases. This shows the transaction history of work through OPX, adding the ability to see points of contact information like emails, document images of letters, data gathered by OPX robots from third party sources. This can be a great time saver.

For example, if handling *Know Your Client* (KYC) reviews, OPX Robotics may go and automatically gather information about the client. It may put the information about company directorships, court judgements, electoral role, credit score reports, into the virtual folder system, available for review as part of the OPX process.

Or a call centre operator may want to see if the caller has returned some documents while on a call. They can use Virtual Folders to check if there are any new entries in the underlying data stores or view email movements from the exchange.

To find out more about how OPX can help you transform your organisation, please contact Alex Allan, CEO.
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