

## **Siebel CRM**

Deploying Siebel Open UI

Siebel Innovation Pack 2015

**E52422-01**

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# Preface

This guide, *Deploying Siebel Open UI*, describes how to deploy Siebel Open UI for Siebel Business Applications.

## Audience

This guide is intended for system administrators, developers, and application administrators.

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

### Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

## Related Documents

For more information, see the following documents on Oracle Technology Network:

- *Configuring Siebel Open UI*
- *Siebel Fundamentals for Siebel Open UI*
- *Siebel Installation Guide* for the operating system you are using
- *Siebel Deployment Planning Guide*
- *Siebel Mobile Guide: Connected*
- *Siebel Mobile Guide: Disconnected*

## Conventions

The following text conventions are used in this document:

| <b>Convention</b> | <b>Meaning</b>   |
|-------------------|--|
| <i>italic</i>     | Italic type indicates book titles, emphasis, a defined term, or placeholder variables for which you supply particular values.    |
| monospace         | Monospace type indicates commands within a paragraph, code in examples, text that appears on the screen, or text that you enter. |

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## What's New in This Release

This chapter describes new product features.

### What's New in Deploying Siebel Open UI, Siebel Innovation Pack 2015

[Table 1-1](#) lists the changes in this revision of the documentation to support this release of the software.

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**Note:** Siebel Innovation Pack 2015 is a continuation of the Siebel 8.1/8.2 release.

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**Table 1-1** *What's New in Deploying Siebel Open UI, Siebel Innovation Pack 2015*

| Topic  | Description   |
|--|---|
| "Roadmap for Deploying Siebel Open UI in an Existing Deployment" on page 3-5 | Modified topic. Siebel Open UI is enabled after a migration installation from any prior release in which Siebel Open UI was not supported or was not explicitly enabled or disabled, for any of the applications that support both Siebel Open UI and high interactivity. |

### What's New in Deploying Siebel Open UI, Siebel Innovation Pack 2014

[Table 1-2](#) lists the changes in this revision of the documentation to support this release of the software.

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**Note:** Siebel Innovation Pack 2014 is a continuation of the Siebel 8.1/8.2 release.

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**Table 1–2 What's New in Deploying Siebel Open UI, Siebel Innovation Pack 2014**

| Topic   | Description  |
|---|--|
| <p>"About Siebel Open UI" on page 2-2</p> <p>"Roadmap for Deploying Siebel Open UI in a New Deployment" on page 3-2</p> <p>"Roadmap for Deploying Siebel Open UI in an Existing Deployment" on page 3-5</p> | <p>Modified topic. For the current release:</p> <ul style="list-style-type: none"> <li>▪ When you initially configure the Siebel Server or install Siebel Mobile Web Clients, you can enable Siebel Open UI for Siebel CRM applications.</li> <li>▪ Updated Siebel Repository files (SRF) are provided with new installations and migration installations of Siebel CRM. Customers do not have to obtain updated SRF files separately, as was required for Siebel Innovation Pack 2013.</li> </ul> |
| <p>"Comparing Features Between Siebel Open UI and the Traditional Clients" on page 4-3</p> <p>"Migration Options for Siebel File System Features in Siebel Open UI" on page 4-19</p>                        | <p>Modified topic. Where Java Runtime Environment is present on the user computer, attachment files can now be saved directly to the Siebel application.</p>   |
| <p>"Siebel Open UI Client Requirements" on page 4-8</p>   | <p>Modified topic. Updated information about requirements for the browser. Also added information about the new browser capability check feature for Siebel Innovation Pack 2014.</p>  |



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## Overview of Siebel Open UI

This chapter provides an overview of Siebel Open UI, a new user interface option for Siebel Business Applications. It contains the following topics:

- ["About This Guide"](#) on page 2-1
- ["About Siebel Open UI"](#) on page 2-2
- ["Related Information About Deploying Siebel Open UI"](#) on page 2-5

### About This Guide

This guide, *Deploying Siebel Open UI*, describes how to deploy Siebel Open UI for Siebel Business Applications.

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**Note:** In general, it is assumed that you have installed Siebel Innovation Pack 2015. For more information, see the *Siebel Installation Guide* for the operating system you are using.

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This guide complements documentation on the *Siebel Bookshelf*, such as *Configuring Siebel Open UI* and *Siebel Fundamentals for Siebel Open UI*. Use it also with the *Siebel Installation Guide* for the operating system you are using, *Siebel Deployment Planning Guide*, and other guides.

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**Tip:** *Configuring Siebel Open UI* contains useful technical information about Siebel Open UI, most of which applies to those who are configuring their applications to take advantage of the many capabilities available in Siebel Open UI.

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This guide provides information that applies to any customer that wants to deploy Siebel Business Applications. This guide also places the deployment tasks that you need to perform within the context of the overall deployment process. Most of the tasks are described in detail in other guides, particularly those relating to installation and deployment.

### Related Topics

["About Siebel Open UI"](#) on page 2-2

["Related Information About Deploying Siebel Open UI"](#) on page 2-5

## Related Books

*Configuring Siebel Open UI*

*Siebel Fundamentals for Siebel Open UI*

*Siebel Installation Guide* for the operating system you are using

*Siebel Deployment Planning Guide*

## About Siebel Open UI

To respond to the need for broad support of clients and devices for Siebel Business Applications, to ease the application deployment process, and to improve the application user's experience, Oracle provides a standards-based, open client, called Siebel Open UI.

This topic contains the following information:

- ["Characteristics and Features of Siebel Open UI"](#) on page 2-2
- ["Siebel Business Applications That You Can Deploy Using Siebel Open UI"](#) on page 2-4
- ["Siebel Business Applications That Require Siebel Open UI"](#) on page 2-4

## Related Topics

["About This Guide"](#) on page 2-1

["Related Information About Deploying Siebel Open UI"](#) on page 2-5

[Chapter 3, "Deploying Siebel Open UI for Siebel Business Applications"](#)

[Chapter 4, "Features of Siebel Open UI"](#)

## Characteristics and Features of Siebel Open UI

Siebel Open UI is a standards-based, open client for Siebel Business Applications. Siebel Open UI provides a rich user interface experience, like the high interactivity client, but it supports any modern browser, like the standard interactivity client. Siebel Open UI is an alternative to these traditional clients and presents many advantages over both.

The following are some of the characteristics and features of Siebel Open UI:

- **Based on Web client standards.** The Siebel Open UI client is an open client based on Web client standards and is a type of rich Internet application. This client runs on any modern standards-compliant browser available on any computing device, but works best on personal computers or laptops. The application layout of tabs, forms, and other user interface elements is determined by the form factor of the browser and the computing device. Using recent browser versions is strongly recommended for optimal functionality and performance.

Applications using Siebel Open UI are optimized for a broad variety of devices, including mobile devices and desktop computers. See also ["Siebel Business Applications That Require Siebel Open UI"](#) on page 2-4.

Siebel Open UI uses versions of HTML, CSS (cascading style sheets), and JavaScript that are supported by recent versions of modern browsers. For more information, see ["Siebel Open UI Client Requirements"](#) on page 4-8 and related topics.

Siebel Open UI does not use ActiveX or Java Runtime Environment, which are used in the high interactivity client. Siebel Open UI requires no browser configuration or special deployment steps on the client computer.

Native browser features in the Siebel Open UI client include browser history, print and print preview, zoom, email links, find, and save page. For more information about the features of Siebel Open UI, see [Chapter 4, "Features of Siebel Open UI."](#)

- **Easy to use and configurable by users.** Many aspects of the user interface have been redesigned in Siebel Open UI. Overall, however, the user experience for Siebel Open UI is similar to that for the traditional Siebel clients, particularly the high interactivity client. Several configuration and personalization options are available for users, including user preferences for left-hand navigation, tab navigation, and visual themes. For more information about using Siebel Open UI, see *Siebel Fundamentals for Siebel Open UI*.
- **Accessible.** Siebel Open UI supports Web client standards that are intended to make Web content and Web applications more accessible for people with disabilities and easier to use for all users. Accessibility is supported by keyboard shortcuts and navigation options. The accessibility features are available for any user, where the browser supports the necessary standards. For more information about accessibility for Siebel Open UI, see *Siebel Fundamentals for Siebel Open UI*.
- **Easy to deploy on the client.** Using the Siebel Open UI client requires only a suitable browser, a URL, and credentials to log in. No browser configuration or special deployment steps are required on the client computer.
- **Easy to deploy on the server.** The deployment tasks on the server for Siebel Open UI are relatively easy. For new installations of the current release, you can enable Siebel Open UI during initial configuration for Siebel CRM applications.

To enable Siebel Open UI for existing applications, where necessary, you set parameters for the Application Object Manager component on the Siebel Server or set similar parameters for the Siebel Mobile Web Client. For existing applications that you are migrating to Siebel Open UI, some additional tasks might apply, depending on your deployment requirements.

Applications for Siebel Open UI can run on the same Siebel Server as any existing Siebel CRM applications. You can use the same Siebel Repository file (SRF), Siebel Web templates, and browser scripting for Siebel Business Applications that are deployed using Siebel Open UI, high interactivity, or standard interactivity. For more information about deploying Siebel Open UI, see [Chapter 3, "Deploying Siebel Open UI for Siebel Business Applications."](#)

- **Configurable by developers.** You can configure Siebel Open UI by using the JavaScript application programming interface (API) or by customizing the cascading style sheets. You can still perform configuration tasks using Siebel Tools, customize Siebel Web templates, and use your existing browser scripts. The Siebel Open UI client can also simplify integrating Siebel CRM with other applications. For information about configuring Siebel Open UI, see *Configuring Siebel Open UI*.

For information about configuring Siebel Mobile applications, see *Configuring Siebel Open UI*, *Siebel Mobile Guide: Connected*, and *Siebel Mobile Guide: Disconnected*. See also ["Siebel Business Applications That Require Siebel Open UI"](#) on page 2-4.

In summary, the product changes for Siebel Open UI improve the usability, deployment, development, and integration options for Siebel CRM. You can expect many benefits by deploying Siebel CRM with Siebel Open UI. For more information, visit this site:

<http://my.oracle.com/go/Siebel>

This topic is part of "[About Siebel Open UI](#)" on page 2-2.

### Related Topics

["Siebel Business Applications That You Can Deploy Using Siebel Open UI"](#) on page 2-4

["Siebel Business Applications That Require Siebel Open UI"](#) on page 2-4

["Related Information About Deploying Siebel Open UI"](#) on page 2-5

## Siebel Business Applications That You Can Deploy Using Siebel Open UI

Siebel Open UI provides a single framework to meet the needs that are associated with a variety of use cases for Siebel Business Applications. You can deploy Siebel Open UI for the following types of Siebel Business Applications:

- **Employee applications.** Siebel Open UI is an alternative for the employee applications that in prior releases were provided for the high interactivity client, such as Siebel Call Center. Some newer applications, such as the Siebel Mobile applications, were built for Siebel Open UI.
- **Customer applications.** Siebel Open UI is an alternative for the customer applications that are currently provided for the standard interactivity client, such as Siebel eSales. However, converting such applications to Siebel Open UI requires manual configuration and migration tasks. A new customer application, Siebel Self Service Portal, was built for Siebel Open UI.
- **Partner applications.** Siebel Open UI is an alternative for partner applications. A new partner application, Siebel Partner Portal, was built for Siebel Open UI.

You can enable Siebel Open UI for the employee applications that support either Siebel Open UI or high interactivity. However, you must confirm that the features that you require are available in the Siebel Open UI client.

If your deployment includes certain applications or features that are not yet available for Siebel Open UI, then you can still run applications that are deployed using high interactivity or standard interactivity, while also running applications that are deployed using Siebel Open UI.

For more information about the features available in Siebel Open UI, see *Siebel Open UI Deployment Guide*, 1499842.1 (Article ID) on My Oracle Support and see other relevant guides on the *Siebel Bookshelf*.

This topic is part of "[About Siebel Open UI](#)" on page 2-2.

### Related Topics

["Characteristics and Features of Siebel Open UI"](#) on page 2-2

["Siebel Business Applications That Require Siebel Open UI"](#) on page 2-4

["Related Information About Deploying Siebel Open UI"](#) on page 2-5

["Migration Tasks for Siebel Open UI"](#) on page 4-17

## Siebel Business Applications That Require Siebel Open UI

The following Siebel Business Applications require Siebel Open UI and use new Application Object Manager components on the Siebel Server and corresponding virtual directories on the Web server. Other applications besides these might also be available that were built for Siebel Open UI.

- **Siebel Self Service Portal for Siebel Open UI.** For more information, see *Siebel eService Administration Guide for Siebel Open UI*. The features of this application are outside the scope of this guide.
- **Siebel Partner Portal for Siebel Open UI.** For more information, see *Siebel Partner Relationship Management Administration Guide*. The features of this application are outside the scope of this guide.
- **Siebel Mobile applications.** These applications are built for specific use cases and are optimized for touch-based mobile devices. For more information, see *Siebel Mobile Guide: Connected* and *Siebel Mobile Guide: Disconnected*. See also *Configuring Siebel Open UI*. The features of the Siebel Mobile applications are outside the scope of this guide.

In general, it is assumed that if you require new applications that were not available when you initially configured your existing deployment, then you will either install new instances of Siebel Servers and Siebel Web Server Extension (SWSE) or reconfigure your existing instances to add the new applications. For more information, see the applicable product-specific documentation and see the *Siebel Installation Guide* for the operating system you are using.

This topic is part of "[About Siebel Open UI](#)" on page 2-2.

### Related Topics

["Characteristics and Features of Siebel Open UI"](#) on page 2-2

["Siebel Business Applications That You Can Deploy Using Siebel Open UI"](#) on page 2-4

["Related Information About Deploying Siebel Open UI"](#) on page 2-5

### Related Books

*Siebel eService Administration Guide for Siebel Open UI*

*Siebel Partner Relationship Management Administration Guide*

*Siebel Mobile Guide: Connected*

*Siebel Mobile Guide: Disconnected*

*Siebel Installation Guide* for the operating system you are using

## Related Information About Deploying Siebel Open UI

For more information about installing, deploying, and configuring Siebel Business Applications and about Siebel Open UI, see the following related books and articles. Most of the books are found on the *Siebel Bookshelf*.

- For the latest information about the functionality that is available for Siebel Open UI, see *Siebel Open UI Deployment Guide*, 1499842.1 (Article ID) on My Oracle Support.
- For the browsers supported by Siebel Open UI, either by being listed as certified or because they support particular standards, and for support information for Siebel CRM in general, see the Certifications tab on My Oracle Support. For more information, see 1492194.1 (Article ID) on My Oracle Support. See also "[Siebel Open UI Client Requirements](#)" on page 4-8 and related topics.
- For information about planning your deployment of Siebel Business Applications, see *Siebel Deployment Planning Guide*.

- For information about installing and configuring Siebel Innovation Pack 2015, see the *Siebel Installation Guide* for the operating system you are using.  
The installation guides describe both new installation of Siebel CRM 15.0 and migration installation for an existing deployment of Siebel CRM version 8.1.1.x or version 8.2.2.x. They also describe installing a new Siebel database, configuring the Siebel Enterprise Server modules and the Siebel Web Server Extension, and performing postinstallation tasks, such as setting the parameters to enable Siebel Open UI, where necessary. See also *Install & Configure Advisor: Siebel Innovation Pack 2015 (15.0)*, 1934028.1 (Article ID) on My Oracle Support.
- For information about obtaining and installing a Siebel Patchset release, see Siebel Patchset Installation Guides, 1614310.1 (Article ID) on My Oracle Support.
- For information about setting up and using the Incremental Repository Merge feature or about upgrading your Siebel database, see *Siebel Database Upgrade Guide*. See also the *Siebel Installation Guide* for the operating system you are using.  
You perform the necessary tasks after installing Siebel Innovation Pack 2015 and before performing any applicable configuration tasks. For an FAQ about Incremental Repository Merge, see 1549478.1 (Article ID) on My Oracle Support. See also *Upgrade Advisor: Siebel from Earlier Releases to 8.1.1.x or 8.2.2.x*, 259.1 (Article ID) on My Oracle Support.
- For information about creating and configuring server components, such as Application Object Managers, see *Siebel System Administration Guide*.
- For information about configuring security for Siebel Business Applications, see *Siebel Security Guide* and *Siebel Security Hardening Guide*.
- For information about configuring Siebel Open UI for Siebel Business Applications, see *Configuring Siebel Open UI*. For additional information about configuring Siebel Business Applications, see *Configuring Siebel Business Applications, Using Siebel Tools, Siebel Developer's Reference*, and related guides.
- For information about using Siebel Business Applications that are deployed with Siebel Open UI, see *Siebel Fundamentals for Siebel Open UI*.
- For information about the Siebel Mobile applications, see *Siebel Mobile Guide: Connected* and *Siebel Mobile Guide: Disconnected*.
- For information about Siebel Self Service Portal for Siebel Open UI, see *Siebel eService Administration Guide for Siebel Open UI*.
- For information about Siebel Partner Portal for Siebel Open UI, see *Siebel Partner Relationship Management Administration Guide*.
- For more information about Siebel Open UI as it pertains to particular Siebel application functionality, see other relevant guides on the *Siebel Bookshelf*.
- For information about the product enhancements in Siebel CRM version 8.1.1.11 and version 8.2.2.4 and earlier, see the applicable *Siebel Maintenance Release Guide* on My Oracle Support. (This guide is no longer provided for Siebel Innovation Pack 2014 and later releases.)
  - For Siebel CRM version 8.1.1.x, see 880452.1 (Article ID)
  - For Siebel CRM version 8.2.2.x, see 1441523.1 (Article ID)

### Related Topics

["About This Guide"](#) on page 2-1

["About Siebel Open UI"](#) on page 2-2



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## Deploying Siebel Open UI for Siebel Business Applications

This chapter provides information about how to deploy Siebel Open UI for Siebel Business Applications. It contains the following topics:

- ["About Deploying Siebel Open UI"](#) on page 3-1,
- ["Roadmap for Deploying Siebel Open UI in a New Deployment"](#) on page 3-2
- ["Roadmap for Deploying Siebel Open UI in an Existing Deployment"](#) on page 3-5

### About Deploying Siebel Open UI

Deploying Siebel Open UI for Siebel Business Applications is relatively straightforward. If you plan the process well, then you can deploy Siebel Open UI applications to your users in a phased process that does not affect the users of your existing applications. You can migrate your Siebel Business Applications to Siebel Open UI without a significant development effort.

The tasks that you must perform, or can perform, depend on whether you are installing Siebel Innovation Pack 2015 in a new deployment or are installing it for an existing deployment. Separate roadmap topics are provided for these two cases. Use the correct roadmap for your installation case.

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**Note:** The roadmap topics are intended to clarify the sequence of tasks in each of these cases. The roadmaps do not cover all of the required tasks. The tasks that you must perform also depend on which RDBMS you are using for the Siebel database, which Siebel CRM products you are installing, your configuration requirements, whether you are using load balancing, and other considerations.

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Most of the steps to install and deploy Siebel Business Applications are described in detail in the *Siebel Installation Guide* for the operating system you are using and are not specific to Siebel Open UI. See other documentation that is noted in the roadmap topics or identified in ["Related Information About Deploying Siebel Open UI"](#) on page 2-5.

The tasks for deploying Siebel Open UI are outlined in the following topics:

- ["Roadmap for Deploying Siebel Open UI in a New Deployment"](#) on page 3-2
- ["Roadmap for Deploying Siebel Open UI in an Existing Deployment"](#) on page 3-5

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**Note:** The tasks and requirements for performing a database upgrade, such as upgrading from Siebel CRM version 8.0.0.x, or for migrating from Siebel Cross-Industry Applications to Siebel Industry Applications, are outside the scope of this guide. Many of the tasks in the roadmaps for new or existing deployments also apply in these upgrade and migration cases. For more information about these upgrade and migration tasks, see *Siebel Database Upgrade Guide*.

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### Related Topics

[Chapter 2, "Overview of Siebel Open UI"](#)

[Chapter 4, "Features of Siebel Open UI"](#)

## Roadmap for Deploying Siebel Open UI in a New Deployment

In a new Siebel CRM deployment, you have not previously installed or configured the Siebel Business Applications for Siebel CRM version 8.1.1.x or version 8.2.2.x, and you are installing the current release, Siebel CRM version 15.0, as a new deployment.

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**Note:** When you configure the Siebel Server or install Siebel Mobile Web Clients, you can enable Siebel Open UI for Siebel CRM applications. Deploying applications using Siebel Open UI is strongly recommended for all deployments, particularly new deployments. This topic assumes that you enable Siebel Open UI in this way. Steps 1 through 7 on page 3-3 apply for any new deployment of Siebel CRM.

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To deploy applications using Siebel Open UI in a new Siebel CRM deployment, you perform the following tasks:

1. Review all of the applicable documentation and requirements.

For more information, see [Chapter 2, "Overview of Siebel Open UI,"](#) including ["Related Information About Deploying Siebel Open UI"](#) on page 2-5. See also ["About Deploying Siebel Open UI"](#) on page 3-1.

2. Perform a *new installation* of the current release, which is Siebel CRM version 15.0 (Siebel Innovation Pack 2015). Use the documented methods for performing new installations of all applicable Siebel modules.

You must install at least the Siebel Gateway Name Server, the Siebel Server and the Database Configuration Utilities, and the Siebel Web Server Extension (SWSE). Also install Siebel Mobile Web Clients, Siebel Tools, and other modules, as needed. For more information about the installation tasks, see the *Siebel Installation Guide* for the operating system you are using.

3. Install the latest Siebel Patchset release, where available.

For information about obtaining and installing a Siebel Patchset release, see *Siebel Patchset Installation Guides*, 1614310.1 (Article ID) on My Oracle Support.

4. On the computer where you installed the Siebel Gateway Name Server, run the Siebel Enterprise Configuration Wizard. Configure the Siebel Gateway Name Server and then configure the Siebel Enterprise.

For more information, see the *Siebel Installation Guide* for the operating system you are using.



5. On the computer where you installed the Siebel Server and the Database Configuration Utilities, run the Siebel Database Configuration Wizard and install a new Siebel database.

Your Siebel database will include all of the repository updates and seed data to support the functionality of Siebel Innovation Pack 2015, including Siebel Open UI. For more information, see the *Siebel Installation Guide* for the operating system you are using.

6. On the computer where you installed the Siebel Server, run the Siebel Server Configuration Wizard and configure the Siebel Server. Also enable Siebel Open UI using this wizard.

For more information, see the *Siebel Installation Guide* for the operating system you are using.

7. Configure the Siebel Web Server Extension (SWSE), as follows:
  - a. On the Siebel Gateway Name Server computer, run the Siebel Enterprise Configuration Wizard and configure the SWSE logical profile.
  - b. On the Web server computer where you installed the SWSE, run the SWSE Configuration Wizard and configure the SWSE.

Together, the tasks in this step create the virtual directories on the Web server for all of the applications for which Application Object Manager components exist at the time that you configure the SWSE logical profile. For more information, see the *Siebel Installation Guide* for the operating system you are using.

8. Depending on your deployment strategy and requirements and on the specific products that you are using, do one or more of the following. It is assumed that, during initial installation and configuration, you enabled Siebel Open UI for Siebel CRM applications. Details are provided in subsequent steps.
  - Keep your applications as they were initially deployed. It is assumed that you enabled Siebel Open UI. Go to Step 12 on page 3-4.
  - Deploy an employee application using high interactivity. Go to the next step.
  - Deploy an employee application using both Siebel Open UI and high interactivity, to support a phased migration to Siebel Open UI. In this case, you would create a copy of an existing Application Object Manager component, and then disable Siebel Open UI for the new copy. Go to Step 10 on page 3-4.

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**Note:** Using Siebel Open UI side by side with high interactivity requires that you use multiple browsers in your overall Siebel CRM deployment. For more information about deploying Siebel Open UI with multiple browsers, see "[Siebel Open UI Client Requirements](#)" on page 4-8 and "[Choosing a User Interface for Siebel CRM](#)" on page 4-16.

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9. As needed, disable Siebel Open UI for an applicable employee application, and enable high interactivity instead. Do the following, then go to the next applicable step for your deployment.
  - For an Application Object Manager component, such as Call Center Object Manager, set the EnableOpenUI parameter to False. (The HighInteractivity parameter must be set to True.)

- For all installed Siebel Mobile Web Clients using this application, edit the application configuration file and set the EnableOpenUI parameter to False. For example, for Siebel Call Center, set this parameter in the uagent.cfg file, in the [InfraUIFramework] section. (The HighInteractivity parameter must be set to True.)

For more information, see the *Siebel Installation Guide* for the operating system you are using and *Siebel System Administration Guide*.

10. As needed, deploy an applicable employee application using both Siebel Open UI and high interactivity. Do the following, then go to Step 11.

- Add a new Application Object Manager component and set the EnableOpenUI parameter to False. For example, you might create a new component for high interactivity that is based on an existing component, such as Call Center Object Manager. (When you copy an Application Object Manager component, make sure that the original application name is copied too.)
- Copy the configuration file for the application corresponding to the Application Object Manager for which you disabled Siebel Open UI. For all installed Siebel Mobile Web Clients, edit the copied configuration file and set the EnableOpenUI parameter to False, in the [InfraUIFramework] section of the file.

For more information, see the *Siebel Installation Guide* for the operating system you are using and *Siebel System Administration Guide*.

11. On the Web server computer where you installed the SWSE, manually create virtual directories for any applications for which you created new Application Object Manager components in Step 10. Go to the next applicable step for your deployment.

For more information, see the *Siebel Installation Guide* for the operating system you are using.

12. (Optional) As needed, perform configuration (customization) tasks for your Siebel Open UI applications.

For more information, see *Configuring Siebel Open UI*.

13. Make the URLs for the Siebel Open UI applications available to test users, who can help you to ensure the readiness for your company's specific functional requirements.

Applications that are deployed for both Siebel Open UI and high interactivity would use different URLs. Your deployment process probably will include multiple phases of testing.

14. For applications that are deployed for both Siebel Open UI and high interactivity, as described in Steps 10 and 11, roll out the Siebel Open UI client to additional users, as the features of this client meet the acceptance requirements of the test users. Convert applications from high interactivity or add more Application Object Managers with Siebel Open UI enabled and add the corresponding virtual directories, as needed.

Your gradual deployment of applications using Siebel Open UI does not have to affect the users of any other applications that you have deployed using high interactivity or standard interactivity. For each type of client, users must use a browser that meets documented requirements.

Depending on your requirements and on the features supported for Siebel Open UI in a given Siebel CRM release, you might eventually migrate all of your users to Siebel Open UI.

### Related Topics

["About Deploying Siebel Open UI" on page 3-1](#)

["Roadmap for Deploying Siebel Open UI in an Existing Deployment" on page 3-5](#)

["Siebel Open UI Client Requirements" on page 4-8](#)

["Choosing a User Interface for Siebel CRM" on page 4-16](#)

## Roadmap for Deploying Siebel Open UI in an Existing Deployment

In an existing Siebel CRM deployment, you have already installed and configured the Siebel Business Applications for Siebel CRM version 8.1.1.x or version 8.2.2.x, and are migrating to the current release, Siebel CRM version 15.0. You have previously deployed applications using Siebel Open UI, high interactivity, or standard interactivity, or some combination of these. It is strongly recommended to enable Siebel Open UI for the employee applications that support either Siebel Open UI or high interactivity.

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**Note:** Steps 1 through 5 on page 3-6 apply for any existing deployment of Siebel CRM.

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To deploy applications using Siebel Open UI in an existing Siebel CRM deployment, you perform the following tasks:

1. Review all of the applicable documentation and requirements.

For more information, see [Chapter 2, "Overview of Siebel Open UI,"](#) including ["Related Information About Deploying Siebel Open UI" on page 2-5.](#) See also ["About Deploying Siebel Open UI" on page 3-1.](#)

2. Perform a *migration installation* of the current release, which is Siebel CRM version 15.0 (Siebel Innovation Pack 2015). Use the documented methods for performing migration installations (patch installations) for all applicable installed Siebel modules.

Perform the migration installation for existing instances of Siebel Enterprise Server (such as Siebel Gateway Name Server or Siebel Server), Siebel Web Server Extension (SWSE), Siebel Mobile Web Clients, and Siebel Tools.

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**Note:** In general, it is not necessary to run the Siebel Configuration Wizards after performing a migration installation, because this task migrates your existing configurations.

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For more information about the installation tasks, see the *Siebel Installation Guide* for the operating system you are using.

3. Install the latest Siebel Patchset release, where available.

For information about obtaining and installing a Siebel Patchset release, see *Siebel Patchset Installation Guides*, 1614310.1 (Article ID) on My Oracle Support.

4. Run Incremental Repository Merge for the Siebel database.

Before you run Incremental Repository Merge, you must have installed at least one Siebel Server with Database Configuration Utilities and installed Siebel Tools. For more information about the requirements and steps for running Incremental Repository Merge, see *Siebel Database Upgrade Guide*. See also the *Siebel Installation Guide* for the operating system you are using.

Your Siebel database will include all of the repository updates and seed data to support the functionality of Siebel Innovation Pack 2015, including Siebel Open UI.

5. Compile new Siebel Repository (SRF) files that include your own custom Siebel Repository content. Update the SRF files for the Siebel Servers and Siebel Mobile Web Clients.

For more information, see *Siebel Database Upgrade Guide* and *Using Siebel Tools*. See also the *Siebel Installation Guide* for the operating system you are using.

6. Depending on your deployment strategy and requirements and on the specific products that you are using, do one or more of the following. Details are provided in subsequent steps.
  - Keep your applications as they were deployed in your previously installed and configured Siebel CRM release, before you installed the current release as a migration installation. Go to Step 11 on page 3-8.

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**Note:** For existing installations (migration installation case), applications generally use their existing client user interface, based on your prior deployment choices. However, Siebel Open UI is enabled after a migration from any prior release in which Siebel Open UI was not supported or was not explicitly enabled or disabled, for any of the applications that support both Siebel Open UI and high interactivity. If you want to revert these applications to high interactivity, then set `EnableOpenUI` to `False`.

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- Deploy an employee application using Siebel Open UI (that was previously deployed using high interactivity). In this case (unless Siebel Open UI was already enabled), you are simply changing an existing Application Object Manager component from high interactivity to Siebel Open UI. Go to Step 7.
- Deploy an employee application using high interactivity (that was previously deployed using Siebel Open UI). In this case, you are simply changing an existing Application Object Manager component from Siebel Open UI to high interactivity. Go to Step 8 on page 3-7.
- Deploy an employee application using both Siebel Open UI and high interactivity, to support a phased migration to Siebel Open UI. In this case, you are creating a copy of an existing Application Object Manager component and disabling Siebel Open UI for the new copy. Go to Steps 9 and 10 on page 3-8.

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**Note:** Using Siebel Open UI side by side with high interactivity requires that you use multiple browsers in your overall Siebel CRM deployment. For more information about deploying Siebel Open UI with multiple browsers, see "[Siebel Open UI Client Requirements](#)" on page 4-8 and "[Choosing a User Interface for Siebel CRM](#)" on page 4-16.

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- To deploy certain new Siebel Business Applications for Siebel Open UI, if you have not already done so, perform Step 11 on page 3-8.
  - To deploy the Siebel Mobile applications, if you have not already done so, perform Step 12 on page 3-8.
7. As needed, enable Siebel Open UI for an existing employee application (that was previously deployed using high interactivity). Do the following, then go to the next applicable step for your deployment.
- For an Application Object Manager component, such as Call Center Object Manager, set the EnableOpenUI parameter to True. (The HighInteractivity parameter must also be set to True.)
  - For all installed Siebel Mobile Web Clients using this application, edit the application configuration file and set the EnableOpenUI parameter to True. For example, for Siebel Call Center, set this parameter in the uagent.cfg file, in the [InfraUIFramework] section. (The HighInteractivity parameter must also be set to True.)

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**Note:** If your existing Application Object Manager has existing users, then it is recommended that you instead perform Steps 9 and 10.

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For more information, see the *Siebel Installation Guide* for the operating system you are using and *Siebel System Administration Guide*.

8. As needed, disable Siebel Open UI for an existing employee application and enable high interactivity. Do the following, then go to the next applicable step for your deployment.
- For an Application Object Manager component, such as Call Center Object Manager, set the EnableOpenUI parameter to False. (The HighInteractivity parameter must be set to True.)
  - For all installed Siebel Mobile Web Clients using this application, edit the application configuration file and set the EnableOpenUI parameter to False. For example, for Siebel Call Center, set this parameter in the uagent.cfg file. (The HighInteractivity parameter must be set to True.)

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**Note:** If your existing Application Object Manager has existing users, then it is recommended that you instead perform Steps 9 and 10.

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For more information, see the *Siebel Installation Guide* for the operating system you are using and *Siebel System Administration Guide*.

9. As needed, deploy an employee application using both Siebel Open UI and high interactivity. Do the following, then go to Step 10.
- Add a new Application Object Manager component and set the EnableOpenUI parameter to True or False, according to your requirements. For example, you might create a new component for Siebel Open UI that is based on an existing component, such as Call Center Object Manager. (When you copy an Application Object Manager component, make sure that the original application name is copied too.)
  - Copy the configuration file for the application corresponding to the Application Object Manager that you created. For all installed Siebel Mobile

Web Clients, edit the copied configuration file and set the EnableOpenUI parameter to True or False, according to your requirements.

For more information, see the *Siebel Installation Guide* for the operating system you are using and *Siebel System Administration Guide*.

10. On the Web server computer where you installed the SWSE, manually create virtual directories for any applications for which you created new Application Object Manager components in Step 9. Go to the next applicable step for your deployment.

For more information, see the *Siebel Installation Guide* for the operating system you are using.

11. As needed, to deploy certain new Siebel Business Applications for Siebel Open UI that did not exist when you originally configured your Siebel CRM environment, do the following:
  - a. Reconfigure the Siebel Server or install and configure a new instance of Siebel Server.
  - b. Reconfigure the SWSE logical profile. Also reconfigure the SWSE or install and configure a new instance of SWSE.

For example, you might need to perform these tasks to use the new Siebel Self Service Portal for Siebel Open UI or the new Siebel Partner Portal for Siebel Open UI. For more information, see applicable product-specific documentation and the *Siebel Installation Guide* for the operating system you are using. See also "[Siebel Business Applications That Require Siebel Open UI](#)" on page 2-4.

12. As needed to deploy the Siebel Mobile applications, run scripts to add these applications to the Siebel Server and the SWSE.

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**Note:** If you reconfigured the Siebel Server and SWSE in Step 11, then these applications are also configured and you do not need to perform this step.

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For more information, see *Siebel Mobile Guide: Connected* or *Siebel Mobile Guide: Disconnected*. See also "[Siebel Business Applications That Require Siebel Open UI](#)" on page 2-4.

13. (Optional) As needed, perform configuration (customization) tasks for your Siebel Open UI applications.

For example, you might need to perform some of the tasks described in "[Migration Tasks for Siebel Open UI](#)" on page 4-17. See also *Configuring Siebel Open UI*.

14. Make the URLs for the Siebel Open UI applications available to test users, who can help you to ensure the readiness for your company's specific functional requirements.

Applications that are enabled for both Siebel Open UI and high interactivity would use different URLs. Your deployment process probably will include multiple phases of testing.

15. For applications that are deployed for both Siebel Open UI and high interactivity, as described in Steps 9 and 10 on page 3-7, roll out the Siebel Open UI client to additional users, as the features of this client meet the acceptance requirements of the test users. Convert applications from high interactivity or add more

Application Object Managers with Siebel Open UI enabled and add the corresponding virtual directories, as needed.

Your gradual deployment of applications using Siebel Open UI does not have to affect the users of any other applications that you have deployed using high interactivity or standard interactivity. For each type of client, users must use a browser that meets documented requirements.

Depending on your requirements and on the features supported for Siebel Open UI in a given Siebel CRM release, you might eventually migrate all of your users to Siebel Open UI.

### **Related Topics**

["About Deploying Siebel Open UI" on page 3-1](#)

["Roadmap for Deploying Siebel Open UI in a New Deployment" on page 3-2](#)

["Siebel Open UI Client Requirements" on page 4-8](#)

["Choosing a User Interface for Siebel CRM" on page 4-16](#)

["Migration Tasks for Siebel Open UI" on page 4-17](#)





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## Features of Siebel Open UI

This chapter provides detailed information about the features provided by Siebel Open UI. It contains the following topics:

- "Siebel Open UI Client User Experience" on page 4-1
- "Comparing Features Between Siebel Open UI and the Traditional Clients" on page 4-3
- "Siebel Open UI Deployment and Integration Features" on page 4-6
- "Siebel Open UI Client Requirements" on page 4-8
- "Siebel Open UI Server Deployment Characteristics" on page 4-10
- "Migration Tasks for Siebel Open UI" on page 4-17
- "Integrations Related to Siebel Open UI" on page 4-21

### Siebel Open UI Client User Experience

The user experience for the Siebel Open UI client is similar to that for the traditional Siebel clients, particularly the high interactivity client. However, many aspects of the user interface have been redesigned in Siebel Open UI to use more modern capabilities that are provided through HTML, CSS, and JavaScript or through native browser features.

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**Note:** The similarities in the user experience will help you to avoid or minimize retraining requirements. Review all relevant aspects of the user experience to help you to support your users who migrate to Siebel Open UI.

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For more information about the features available in Siebel Open UI, see *Siebel Open UI Deployment Guide*, 1499842.1 (Article ID) on My Oracle Support and see other relevant guides on the *Siebel Bookshelf*.

### Modern Technologies and Design

The following are some of the modern design features that are made possible by the modern technologies used in the Siebel Open UI client:

- The application layout of tabs, forms, and other user interface elements is determined by the form factor of the browser and the computing device.
- New personalization options are provided for left-hand or tab navigation.

- The user interface is fully accessible without configuration.
- Native browser features in the Siebel Open UI client include browser history, print and print preview, zoom, email links, find, and save page.
- Siebel Open UI now supports visual themes for the user interface.

## Modern Controls

The following are some of the modern controls that are provided in the Siebel Open UI client:

- Grid with ability to support forms
- Map integration ability (requires configuration)
- URL integration ability
- Date and time fields
- Keyboard use only or tablet use only
- WAI-ARIA navigation model for accessibility (uses tab navigation). For more information, see "[Siebel Open UI Client Requirements](#)" on page 4-8.
- Calculator
- Lists and forms with image support
- Multiple file upload or download control
- Analogous picklists and MVGs
- New menus and toolbars
- Calendar

## New Look and Feel

The following are some of the Siebel application features that have a new look and feel in the Siebel Open UI client:

- SmartScript
- Task-Based UI
- Customer Order Management
- The new visual themes feature for Siebel Open UI enables users to specify a new overall look and feel for their Siebel application
- The new user preferences for left-hand and tab navigation also enable users to tailor the user experience to their needs

## Native Browser Features

The following are some of the native browser features that are used in the Siebel Open UI client:

- Browser history management
- Print and print preview
- Zoom
- Email links

- Find
- Save page

## Optimizing the User Experience Through Design

Siebel Open UI enables you to implement highly tuned design patterns and helps you to envision the design possibilities and simplification they can bring to your Siebel implementation. Siebel Open UI allows for a highly optimized user experience through its rich extensibility features, when combined with design best practices.

Oracle's UX Direct program provides tools and resources to help you get started with implementing a user-centered design for your Siebel Open UI applications. For more information about UX Direct, see the following sites:

<http://www.oracle.com/webfolder/ux/applications/>

<https://blogs.oracle.com/uxdirect/>

## Configuring and Extending the User Interface

The following are some of the development features of the Siebel Open UI client that make it possible for you to extend the client user interface:

- JavaScript application programming interface (API)
- Customizable cascading style sheets
- Existing configuration options for Siebel Business Applications are still available

To help you to achieve the best possible user experience, Siebel Open UI provides a fully published JavaScript API to build powerful Siebel CRM solutions. This API enables you to extend the capabilities of the features provided by Oracle. The JavaScript API supports simple validations as well as more complex capabilities, such as the replacement of entire UI components that must be rendered in special ways. The implementation of cascading style sheets (CSS) for the Siebel Open UI client simplifies branding the user experience. You can manipulate any aspect of colors, fonts, layout, and styling for your Siebel CRM applications.

You can continue to use the tools that you are accustomed to, or you can use the new Web development extensibility features to build application features that were previously unachievable using traditional means.

## Comparing Features Between Siebel Open UI and the Traditional Clients

This topic compares the features in Siebel Open UI and the features in the traditional clients (the high interactivity and standard interactivity clients). Some of the features that are available in the Siebel Open UI client do not map exactly to the features that are available in the traditional clients. Review all of the relevant information carefully before making deployment choices.

- **Features that have changed.** Some of the general user interface features in Siebel Open UI have changed relative to similar features in the traditional clients. This topic describes several features from the high interactivity client and explains the differences in how these features are implemented in Siebel Open UI.
- **Features that are available.** Many other Siebel CRM application features from the traditional clients are now available in Siebel Open UI. For more information about the features that are available in Siebel Open UI and about some of the differences in how these features are implemented, see *Siebel Open UI Deployment*

*Guide*, 1499842.1 (Article ID) on My Oracle Support. See also the *Siebel Bookshelf* guides that describe the available features.

- **Features that are not available.** Some of the features from the traditional clients are not currently available in Siebel Open UI. For more information, see *Siebel Open UI Deployment Guide*, 1499842.1 (Article ID) on My Oracle Support. Some of these features might be provided in future releases.

If you require any features that are not currently available in Siebel Open UI, then you can continue to use the high interactivity or standard interactivity client. To remediate any limitations in feature availability, you can locate Siebel Open UI applications on the same Siebel Server with your existing standard interactivity or high interactivity applications. All of the applications can use the same set of SRF files.

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**Note:** Some features of the standard interactivity client are not supported for automatic conversion to Siebel Open UI. Not all of the standard interactivity features can be manually migrated to Siebel Open UI. Migrating applets or views to Siebel Open UI requires high interactivity equivalent applets or views in Siebel Tools. If an equivalent view is available for Siebel Open UI or high interactivity, then Siebel Open UI can render this view. For more information, see "[Behavior of Standard Interactivity Views in Siebel Open UI](#)" on page 4-20.

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## Siebel Open UI Features That Deviate from Features in the High Interactivity Client

For specific features, Siebel Open UI deviates from the way Siebel CRM has worked in the past. The following product differences must be considered when you implement Siebel Open UI:

- **Artifacts in the user interface.** Some of the UI features in the traditional clients do not work in the Siebel Open UI client. Artifacts for these features are still present in the Siebel Open UI client, to maintain consistency with the existing user interface rendering. Notable items are:
  - Standard interactivity applet artifacts. For more information, see "[Behavior of Standard Interactivity Views in Siebel Open UI](#)" on page 4-20.
  - Buttons for features that are not available in the application toolbar, such as legacy printing and spell-check options.

You can remove those UI elements by manipulating the configuration using Siebel Tools or by using supported Web development methods, such as by post-loading CSS style sheets.

- **Escape key and undo.** Pressing the Escape key once performs a single undo operation. Pressing the Escape key multiple times might generate multiple results, depending on the user's previous activity, including which user interface elements the user has interacted with.
- **Double-clicking.** Double-clicking has been eliminated from the Siebel Open UI client, to improve usability. Double-clicking causes difficulties for novice users and presents drawbacks to accessibility. It also conflicts with the single-click interaction style of the Web and of many mobile devices, and it is not common to all operating systems.
- **Right-clicking.** Right-clicking has been eliminated from the Siebel Open UI client to improve usability. Right-clicking lacks good usability characteristics. It is not

discoverable, it does not meet accessibility requirements, and it is difficult to implement on mobile devices.

- **Logout on exit.** Automatic logout upon closing the browser cannot be supported in a standards-based implementation, due to Web browser and W3C limitations. This action cannot directly communicate to the server that the user has disconnected. Therefore, Siebel Open UI applications behave differently in this regard than high interactivity applications do. It is recommended to set session time-out intervals as short as possible while maintaining usability. Also train users to log out of the application explicitly.
- **Implicit commit on the browser Back button.** An implicit commit of data record changes when a user clicks the browser Back button cannot be supported in a standards-based implementation, due to Web browser and World Wide Web Consortium (W3C) limitations. Therefore, Siebel Open UI applications behave differently in this regard than high interactivity applications do. Users must commit changes through supported methods.
- **Scrollbars.** Horizontal scrollbars are not used in the Siebel Open UI client, because they tend to deteriorate usability. However, to emulate specific behaviors, you can add horizontal scrollbars by using CSS changes. For long lists, use the forward and backward buttons in place of vertical scrollbars. Using refined queries displays a smaller result set and enhances usability.
- **Pick lists and LOVs.** Pick lists and LOVs do not select a new value until a unique match is made. If you are using auto-fill but an exact match is not made, then the value reverts to the original. Double-quotes are not included when you select from an LOV.
- **Shuttle applets and MVGs.** Shuttle applets and MVGs have been redesigned for improved usability and to make them more consistent with pick lists.
- **Images and screens.** The look and feel of the following features has changed. You can also revert most of these features to a prior look and feel.
  - Login and logout pages have an updated look.
  - Task bar icons are more modern, with higher resolution and color depth.
  - Buttons have been updated, with higher resolution and color depth.
  - The Oracle logo font and color have changed.
  - The tab bar has no images, for consistency.
  - Check boxes have an updated look.
  - New columns-displayed icons have been added.
- **Attachments.** Attachment files stored in the Siebel File System cannot be edited on the fly in Siebel Open UI. That is, attachment documents cannot be opened, edited, and saved directly back to the Siebel application. Users must download an attachment document into a secure location specified by the browser, edit and save the document, and then upload the document. This behavior is standard for true Web-based applications.

Where Java Runtime Environment is present on the user computer, however, attachment files can be saved directly to the Siebel application.

For more information about issues in using the Siebel File System in Siebel Open UI applications, see "[Migration Options for Siebel File System Features in Siebel Open UI](#)" on page 4-19.

- **Auditing for the print feature.** Siebel Open UI uses the browser's native print features, rather than using proprietary printing features. Use external audit capabilities to audit printing by users or Siebel Business Applications. Siebel Open UI does not support print audit features.
- **Signature captures.** Store signature captures as images for Siebel Open UI applications, to avoid integration issues for external components trying to display signatures. The previous encryption algorithm for signature captures is not supported. For more information about configuring an integration for signature capturing, see *Configuring Siebel Open UI*.

## Siebel Open UI Deployment and Integration Features

This topic describes some of the deployment and integration features of the Siebel Open UI client.

### Siebel Architecture Layers

The Siebel application architecture consists of multiple layers:

- Data layer (database tables and columns)
- Objects layer (business objects and business components)
- User interface layer (views, applets, controls)
- Physical user interface layer: the presentation model and the physical user interface renderer (Web templates for views and applets)

You can use Siebel Tools to configure the data layer, the objects layer, and the user interface layer. Bindings between the user interface layer and the physical user interface layer were also created in Siebel Tools. Siebel Open UI provides the ability to fully modify the physical user interface layer.

### Standard-Based Web Client

The Siebel Open UI client is a true standards-based Web client, requiring only a URL and credentials and a standards-compliant browser. No browser configuration is required. The Siebel Open UI client runs on any modern standards-compliant browser on any computing device, but works best on personal computers or laptops. (The Siebel Mobile applications, which use Siebel Open UI, are optimized for touch-based mobile devices.)

### Benefits for Deployments and Integrations

The Siebel Open UI client provides the following benefits for deployments and integrations:

- Supports full extension of the presentation model and the physical user interface renderer to meet any Siebel CRM use case
- Hierarchical, embeddable presentation model
- Application-focus state management capabilities
- Full branding capabilities
- Partial refresh
- iFrame-based portal integrations

- Full support for Siebel Remote and Siebel Mobile Web Client deployments

## Summary of Key Deployment and Migration Tasks

You can deploy Siebel Business Applications using Siebel Open UI or migrate your existing Siebel Business Applications to use Siebel Open UI without a significant development effort. Some of the key tasks are summarized in this topic.

The specific tasks that you must perform differ for new and existing deployments and differ based on the Siebel Business Applications that you are deploying. For detailed roadmaps of the tasks that you must perform to deploy Siebel Business Applications using Siebel Open UI, see:

- ["Roadmap for Deploying Siebel Open UI in a New Deployment"](#) on page 3-2
- ["Roadmap for Deploying Siebel Open UI in an Existing Deployment"](#) on page 3-5

### Enabling Siebel Open UI

When you configure the Siebel Server or install Siebel Mobile Web Clients, you can enable Siebel Open UI for Siebel CRM applications. Where necessary, to enable Siebel Open UI for an existing application, you set the following parameters for an existing Application Object Manager component, such as Call Center Object Manager:

- Set `EnableOpenUI` to `True` (it is already set to `True` for Siebel Open UI).
- Set `HighInteractivity` to `True` (it is already set to `True` for high interactivity or Siebel Open UI).

### Migrating Existing Applications to Siebel Open UI

To migrate existing applications to Siebel Open UI, you can configure new applications that are parallel to your existing applications. For example, base a new component on an existing component like Call Center Object Manager. Do the following:

- Add new Application Object Manager components on the Siebel Server. Then:
  - Set `EnableOpenUI` to `True`.
  - Set `HighInteractivity` to `True` (it is already set to `True` for high interactivity).
- Manually create virtual directories on the Web server for the applications for which you created new Application Object Manager components.

See also ["Choosing a User Interface for Siebel CRM"](#) on page 4-16.

### Deploying New Applications Created for Siebel Open UI, for an Existing Environment

To deploy new Siebel Business Applications for Siebel Open UI that did not exist when you originally configured your Siebel CRM environment, you might have to reconfigure the Siebel Server and reconfigure the SWSE logical profile and the SWSE. For more information, see the applicable product-specific documentation and see the *Siebel Installation Guide* for the operating system you are using.

### Reverting from Siebel Open UI to High Interactivity

To revert an application from Siebel Open UI to high interactivity, where applicable, you set the following parameters:

- Set `EnableOpenUI` to `False`.

- Set HighInteractivity to True (it is already set to True for high interactivity or Siebel Open UI).

## Siebel Open UI Client Requirements

This topic describes Siebel Open UI client requirements in detail.

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**Note:** For more information about the browser standards supported by Siebel Open UI, and for particular browser versions that are certified as supporting those standards, see the Certifications tab on My Oracle Support. For more information, see 1492194.1 and 1491004.1 (Article ID) on My Oracle Support. See also *Siebel Open UI Deployment Guide*, 1499842.1 (Article ID) on My Oracle Support.

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## Siebel CRM Releases Supporting Siebel Open UI

For the purposes of this guide, it is assumed that you are deploying Siebel Open UI for the current release, Siebel CRM version 15.0. This release is also known as Siebel Innovation Pack 2015. After installing the software, install the latest Siebel Patchset release, where available. Specific Siebel Open UI requirements differ for prior Siebel CRM releases.

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**Note:** The current release also still supports the high interactivity and standard interactivity clients, for applicable applications. However, using Siebel Open UI is strongly recommended.

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For detailed roadmaps of many of the tasks that you must perform to deploy Siebel Business Applications using Siebel Open UI, see [Chapter 3, "Deploying Siebel Open UI for Siebel Business Applications."](#)

## Browser Standards and Performance Requirements

Siebel Open UI performs best on modern browsers that comply with W3C standards. Siebel Open UI is built on the HTML 5 standards. Oracle is committed to supporting Web standards to ensure that users have a problem-free experience when using Siebel Open UI applications.

For the current release, Siebel Open UI supports Web browsers for Siebel CRM applications if they conform to the following browser standards:

- **HTML.** Browsers must support HTML 5 to take full advantage of the features in Siebel Open UI. For an overview of HTML 5 browser compliance, see <http://html5test.com/results/desktop.html>
- **Cascading style sheets (CSS).** Browsers must support CSS 2.1, as a minimum requirement. However, CSS 3.0 provides an improved user experience.
- **JavaScript.** Browsers must support JavaScript (ECMA-262 and later). The performance of the chosen browser and computing device has a large impact on Siebel Open UI client performance. Any browser or device that can meet a .4 second or less SunSpider JavaScript benchmark generally yields acceptable performance for Siebel Open UI. This figure is a guideline only and requires user acceptance testing as validation. This benchmark test is available here:

<http://www.webkit.org/perf/sunspider/sunspider.html>



See also "[Performance for Siebel Open UI Client](#)" on page 4-13.

- **WAI-ARIA.** For users that require accessibility features, browsers must support WAI-ARIA (Web Accessibility Initiative: Accessible Rich Internet Applications) and WAI-ARIA-compliant technologies such as screen readers. For more information, see *Siebel Fundamentals for Siebel Open UI*.

Oracle tests Siebel Open UI internally against current versions of the following commonly used enterprise browsers:

- Microsoft Internet Explorer
- Google Chrome
- Mozilla Firefox
- Apple Safari (Macintosh only)

For more information about the browser standards supported by Siebel Open UI, and for particular browser versions that are certified as supporting those standards, see the Certifications tab on My Oracle Support.

For example performance data for a variety of browsers, see *Siebel Open UI Deployment Guide*, 1499842.1 (Article ID) on My Oracle Support. This data provides a means of comparing relative computing performance in a normalized manner. Some browsers are better suited to high performance and optimized characteristics than others.

For information about strategies for working with multiple browsers or multiple browser versions, see "[Using Legacy Browsers When Migrating to Siebel Open UI](#)" on page 4-17.

## Browser Capability Check

A browser capability check is performed when a user accesses a login page for a Siebel application that is deployed using Siebel Open UI. The results are displayed in the form of a list of HTML 5 features that Siebel Open UI requires, along with an indication of whether the browser passes or fails the check for each feature. When an HTML feature is not supported by the browser, dependent Siebel Open UI features might not be available. Customers or users can use the information provided and make decisions about how to proceed. Customers that want to disable this feature can do so by using available customization methods.

## Browser Limitations Affecting Siebel Open UI

For certain browsers, some, but not all, of the known limitations that are related to the standards and key performance indicators required by Siebel Open UI are listed as follows. For other browsers, use the links to review the level of support provided by the browsers for each functional area.

- **Google Chrome (all versions), Apple Safari (all versions).** Accessibility features are supported only in browsers supporting WAI-ARIA. Browsers listed with partial support at the following link are not recommended for accessibility:  
<http://caniuse.com/wai-aria>
- **Microsoft Internet Explorer (all versions), Apple Safari 3.2 (and earlier).** These browsers implement resizing for textarea controls using CSS for notes fields using vertical scrollbars, if at all. Other browsers implement textarea resizing as resizable text boxes in multiple dimensions, leading to a better user experience. Review the following:

<http://caniuse.com/css-resize>

- **Microsoft Internet Explorer 9 (and earlier).** Drag and drop features are supported only in applicable HTML 5 browsers. Review the results of the following search:  
<http://caniuse.com/#search=drag>
- **Microsoft Internet Explorer 9 (and earlier).** Text field length cannot be controlled, causing potential data loss when field values are saved. Enhanced long column field validations, such as those in Description fields, are supported only in applicable HTML 5 browsers. Review the results of the following search:  
<http://caniuse.com/#search=validation>
- **Microsoft Internet Explorer 9 (and earlier).** Bookmark features, browser history, and fully defined URLs are supported only in applicable HTML 5 browsers. Review the results of the following search:  
<http://caniuse.com/#search=history>
- **Microsoft Internet Explorer 9 (and earlier).** For these browsers, users might experience session time-out issues with Single Sign-On, related to supporting XMLHttpRequest. Review the following:  
<http://caniuse.com/xhr2>
- **Microsoft Internet Explorer 9 (and earlier).** For these browsers, JavaScript performance does not reach the .4 second SunSpider benchmark.

Using browsers that are not fully compliant with HTML 5 or other requirements might limit user functionality across the application.

## Hardware Requirements for Siebel Open UI

Siebel Open UI has no specific hardware requirements for the client, beyond the minimum requirements posted by the vendors of the browser, device, or operating system that it runs on. Running modern browsers on newer hardware improves performance. It is recommended that you perform acceptance testing against the actual environment that is used, if possible.

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**Note:** Customers are strongly advised to carefully choose browsers and to perform acceptance testing against all applicable performance success criteria. Using modern browsers or improved hardware can help you to resolve performance issues.

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## Siebel Open UI Server Deployment Characteristics

This topic describes some of the characteristics of the server environment in a Siebel Open UI deployment. It includes the following information:

- ["Security for Siebel Open UI Deployments"](#) on page 4-11
- ["Server-Side Memory Footprint for Clients"](#) on page 4-12
- ["Firewall and Proxy Server or Reverse Proxy Server Requirements"](#) on page 4-12
- ["Web Server Performance Tuning for Siebel Open UI"](#) on page 4-12
- ["Client-Server Communication and Network Characteristics"](#) on page 4-13
- ["Performance for Siebel Open UI Client"](#) on page 4-13
- ["Tuning Configured Applications for Virtual Screen Space"](#) on page 4-14
- ["Implementation Differences Related to Browsers"](#) on page 4-14

- ["Differences Between the Siebel Open UI Client and the High Interactivity Client"](#) on page 4-15
- ["Choosing a User Interface for Siebel CRM"](#) on page 4-16

## Security for Siebel Open UI Deployments

Siebel Open UI is the most secure Siebel CRM client available, with the following characteristics:

- **Limited attack surface.** Siebel Open UI uses only three technologies to render the client code: HTML, CSS, and JavaScript. Because of the small set of underlying technologies that are used to render the client and the absence of third-party plug-ins such as ActiveX and Java, Siebel Open UI provides the smallest possible attack surface.
- **Transparent technology.** Because the Siebel Open UI client is built entirely on standards, a variety of modern inspection tools can be used to validate the security compliance of your implementations.
- **Compatibility with Data Execution Prevention features and virtualization.** Because the Siebel Open UI client is a scripted client, it is fully compatible with Data Execution Prevention features for software or hardware, and compatible with virtualization features. The Siebel Open UI client supports a variety of techniques for implementing secure environments.
- **Secure sessions and limited concurrency.** The Siebel CRM server environment provides sophisticated session security for a secure user experience. To protect data integrity and system security, concurrent browser sessions are not supported for Siebel CRM applications. When this condition is detected, the application provides options for how to proceed.
- **FIPS-140-2.** Siebel Open UI supports the FIPS-140-2 standard, with applicable configuration.
- **Common Criteria Certification.** The Siebel CRM applications meet Common Criteria Certification, to Evaluation Assessment Level 2. For more information, see the following:

[http://www.commoncriteriaportal.org/files/epfiles/st\\_vid3026-vr.pdf](http://www.commoncriteriaportal.org/files/epfiles/st_vid3026-vr.pdf)

Oracle tests JavaScript controls from third parties according to the same rigorous standards as those for testing Oracle code. Because all of the client code is standards-based and well-understood by inspection tools, thorough testing is simplified. Oracle uses industry-leading Web application security assessment solutions to validate that the Siebel Open UI client is secure. Oracle also validates security through its security-architecture teams and its internal oversight organizations and works with the ethical hacking community to put code to the practical test of security.

Oracle takes part in Open Web Application Security Project (OWASP). Developer training provided by Oracle Software Security Assurance (OSSA) is in line with the guidelines and recommendations provided by OWASP documentation. All Oracle product development teams are mandated to follow OWASP guidelines, policies, and secure coding standards.

This topic is part of ["Siebel Open UI Server Deployment Characteristics"](#) on page 4-10.

### Related Topics

["Implementation Differences Related to Browsers"](#) on page 4-14

### **Related Books**

*Siebel Security Guide*

*Siebel Security Hardening Guide*

## **Server-Side Memory Footprint for Clients**

The resource use for Siebel Open UI is similar to the resource use for the high interactivity client. The work done on the server is similar for the Siebel Open UI client as it is for the high interactivity client. Providing the same set of users with two Application Object Managers for an application, one for Siebel Open UI and one for high interactivity, does not necessarily require additional hardware resources, because users tend to use only one client at a time.

This topic is part of "[Siebel Open UI Server Deployment Characteristics](#)" on page 4-10.

## **Firewall and Proxy Server or Reverse Proxy Server Requirements**

When deploying Siebel Business Applications across a firewall, make sure that the firewall supports the HTTP 1.1 protocol. Using HTTP 1.0, although it is supported, results in reduced performance. If the firewall or proxy server does not fully support HTTP 1.1, then make sure of the following:

- Web server compression is disabled. Set the DoCompression parameter to False in the eapps.cfg file.
- The firewall proxy is able to handle cookie wrapping or other proxy-specific features that enable cookie handling and forwarding.
- Headers passed to the Siebel Web Server Extension do not contain HTTP 1.1 protocol content. You can automate this by setting the proxy server to strip out HTTP 1.1 header content.

This topic is part of "[Siebel Open UI Server Deployment Characteristics](#)" on page 4-10.

### **Related Books**

*Siebel Security Hardening Guide*

## **Web Server Performance Tuning for Siebel Open UI**

Although the Siebel Web Server Extension (SWSE) attempts to perform some amount of optimization, it is recommended that you run performance-tuning plug-ins such as YSlow, an add-on for Mozilla Firefox. YSlow verifies proper configuration tuning of the Web server. For more information about YSlow, see

<https://addons.mozilla.org/en-US/firefox/addon/yslow/>

For a well-configured system, YSlow generally provides a grade of 85 or higher. For more information about performance rules for Web servers, see the following site:

<http://developer.yahoo.com/performance/rules.html>

The following settings are required for the Web server:

- Minify customization by using a tool such as YUI Compressor for your custom JavaScript and CSS.
- Enable Gzip compression on the Web server.
- Disable entity tags (ETags) on the Web server. Doing this generally improves performance on multi-server deployments.

- Set header expiration to five days for production deployments. Do not set header expiration for development environments.

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**Note:** For Microsoft IIS 7 and later, these settings are automatically set correctly in the IIS configuration when you configure the SWSE. For other supported Web servers, you must optimize the Web server manually.

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For more information about configuring the Web server and the SWSE, see the *Siebel Installation Guide* for the operating system you are using. For more information about performance tuning for Siebel Business Applications, see *Siebel Performance Tuning Guide*.

This topic is part of "[Siebel Open UI Server Deployment Characteristics](#)" on page 4-10.

### Related Books

*Siebel Installation Guide* for the operating system you are using

*Siebel Performance Tuning Guide*

## Client-Server Communication and Network Characteristics

Because the client-server communication is very similar for both Siebel Open UI and high interactivity, the networking characteristics are similar. In support of reduced network traffic, the Siebel Open UI client supports the following new features:

- **Partial refresh.** This feature allows only distinct regions of the UI to be refreshed, rather than the entire screen. This feature saves network bandwidth.
- **Push notifications.** This feature eliminates polling for Siebel Communications Server messages, such as for computer telephony integration (CTI) and other types of messages.

These features improve bandwidth requirements and in some cases reduce power consumption on mobile devices, by reducing chattiness. Siebel CRM can run on modern wired or wireless networks, and it supports use over low-bandwidth connections.

This topic is part of "[Siebel Open UI Server Deployment Characteristics](#)" on page 4-10.

### Related Books

*Siebel CTI Administration Guide*

## Performance for Siebel Open UI Client

The Siebel Open UI client uses interpreted JavaScript to render the client, which performs extremely well on modern browsers. Features such as partial refresh supporting greater granularity and efficient updating of UI regions, and improved asynchronous operation, improve performance characteristics in specific use cases of the client.

Siebel Open UI caches client files and static Web templates by using different implementations but similar mechanisms as the high interactivity client. It is expected that performance will be largely similar, although you are advised to test for performance in your user-acceptance testing.

In order to work on a variety of platforms, Siebel Open UI runs on code that is interpreted or JIT (just-in-time) compiled in the browser. Differences in performance depend on customization of the interface when you run cross-platform code that is inherent to Siebel Open UI.

This topic is part of "[Siebel Open UI Server Deployment Characteristics](#)" on page 4-10.

### **Related Topics**

["Siebel Open UI Client Requirements"](#) on page 4-8

["Client-Server Communication and Network Characteristics"](#) on page 4-13

## **Tuning Configured Applications for Virtual Screen Space**

A Web application can render content beyond the limits of the data displayed on the screen, effectively increasing the amount of work done to render content without any user benefit. It is recommended to build user interfaces that render only content in the visible area of the user interface. Large rendered surfaces, the interpreted nature of the application, and the ability to adjust application functionality can compound and reduce the performance and response times of the UI. It is recommended that you review the deployment with a focus on optimized content.

In light of these considerations, review the following recommendations:

- **Minimize the number of applets in a view.** It is recommended both from a performance and usability perspective not to add more applets to a screen than the typical user can view or work with without scrolling. Scrolling interrupts work and does not work well on some mobile devices, and the content that is not displayed still must be rendered when the screen is refreshed.
- **Minimize the number of displayed columns in a list view.** Consider limiting and setting reasonable defaults for the number of columns available for list views. For most computer desktops, no more than seven columns should be displayed by default, as a rule of thumb. Even hidden components have to be processed by the rendering engine.

This topic is part of "[Siebel Open UI Server Deployment Characteristics](#)" on page 4-10.

### **Related Books**

*Siebel Performance Tuning Guide*

## **Implementation Differences Related to Browsers**

Siebel Open UI tries to hide specific differences in rendering between browsers within the user interface, but some browser-specific differences exist. Customers are encouraged to identify differences in rendering and to choose browsers based on the best usability offered. Examples are provided in this topic.

This topic is part of "[Siebel Open UI Server Deployment Characteristics](#)" on page 4-10.

## **Use of Popup Blockers**

Siebel Open UI is compatible with popup blocker use. Make sure that Siebel application servers and third-party iFrames are whitelisted or excluded from blocking by popup blockers.

## Impact of Browser Dynamic Patching of Browsers

Two basic strategies exist for managing your browser version:

- **Lock browsers to specific versions.** Although locking your browser version mitigates the risks of introducing regressive interactions into the Siebel CRM environment, this approach introduces the risks of not patching imperfect browser code and does not help in addressing functional and security fixes in browsers.
- **Dynamically update browsers.** It is strongly recommended to mitigate browser-related functional and security risks by allowing browsers to update dynamically. If regressive interactions occur, then Oracle and the browser vendors are committed to addressing these in a timely manner.

## Validation Services for Standards Compliance

To validate Siebel application pages and the browser you are using against W3C standards, you can use any of several validation services, including the following:

- W3C markup validation:  
<http://validator.w3.org/>
- HTML 5 validation:  
<http://html5.validator.nu/>
- CSS validation:  
<http://jigsaw.w3.org/css-validator/>
- Lint, JSLint and derivative programs:  
<http://www.jshint.com/>

## Tabbed Browsing

Tabbed browsing is supported with Siebel Business Applications for one active session. Multiple Web pages can be opened using tabbed browsing. However, only one tab can have a live connection to a Siebel application at a given time. Using multiple browser tabs uses more resources and therefore can affect client performance.

## Language Support

In general, language support for Siebel Open UI is similar to language support provided in previous versions on the traditional clients. For Siebel language support, Unicode support, and legacy code page support, see 1513102.1 (Article ID) on My Oracle Support. See also *Siebel Global Deployment Guide* and *Siebel Installation Guide* for the operating system you are using.

## Differences Between the Siebel Open UI Client and the High Interactivity Client

Some technical differences between the Siebel Open UI client and the high interactivity client are described as follows. See also "[Siebel Open UI Client Requirements](#)" on page 4-8.

This topic is part of "[Siebel Open UI Server Deployment Characteristics](#)" on page 4-10.



## JavaScript Framework

Modern browsers and JavaScript-based applications perform very well in delivering functional, high-performance, and standards-based applications that do not require plug-ins or associated predeployment tasks (such as for ActiveX controls used in the high interactivity client). The Siebel Open UI client provides a flexible platform for employee, partner, and customer applications.

## Hard-Coding Versus Flexibility

The Siebel Open UI client is more flexible than the high interactivity client, for which much of the functionality is hard-coded.

- **Siebel Open UI.** In the Siebel Open UI client, all aspects of rendering can be controlled. Colors, fonts, borders, backgrounds, and the controls used for rendering can be exchanged to offer just about any user experience desired. This flexibility creates somewhat more overhead in regard to performance, when combining this attribute with improper application tuning. It is recommended to tune customized applications to take this into consideration.
- **High interactivity.** This client is effectively a monolithic client: colors, borders, and fonts cannot easily be changed, and you cannot modify the behavior of the UI. This monolithic design enables a compact client, though it is not flexible.

## Compiled Versus Interpreted Code

In the Siebel Open UI client, more of the code is interpreted than compiled, relative to the high interactivity client.

- **Siebel Open UI.** Siebel Open UI has a strong dependency on the performance of the browser's rendering engine. The information about browser performance provides guidance on choosing the best performing clients.
- **High interactivity.** This client is built using ActiveX, which is essentially Win32 compiled and proprietary code. Operations in this client can be processed very efficiently.

## Accessibility

The support for WAI-ARIA standards for accessibility for the Siebel Open UI client changes the way in which the Siebel Business Applications support accessibility requirements. For more information, see *Siebel Fundamentals for Siebel Open UI*.

## Choosing a User Interface for Siebel CRM

Siebel CRM supports side-by-side use of all user interfaces in a single deployment and on a single server: Siebel Open UI, high interactivity, and standard interactivity. However, each user interface must have a configured Application Object Manager component. Separate components allow you to run Siebel Open UI in parallel to existing Siebel client instances. All applications use a unique URL.

Siebel Open UI supports the existing SRF without any change to it and supports Siebel Web template files that have been customized. With Siebel Open UI, it is recommended that you move any custom Web templates to the newly created customer files directory, as described in *Configuring Siebel Open UI*. See also "[Migrating SRF Files and SWT Files](#)" on page 4-18.

Additionally, migrating to Siebel Open UI requires no changes in your existing browser scripting, as used in high interactivity.



The new JavaScript API provides a more modern means of achieving what you can also achieve using client-side browser scripting. You can write JavaScript using your own development environment and extend it by using the provided JavaScript API. For guidance on converting browser scripting to JavaScript API content, see *Configuring Siebel Open UI*.

When you use the new file deployment structure, Siebel Open UI allows you to obtain dynamically updated Web templates from Oracle, without the possibility of overwriting your custom file content. Using the new customer directory allows for maintenance and improvement of templates for issues related to performance, usability, and standards compliance of the standard templates, as part of Siebel Innovation Pack releases. You can lock templates, preventing them from being upgraded, by moving them to the customer directory structure. If you migrate existing Web templates for high interactivity, then you must physically move the files into the new directory structure. For guidance on this activity, see *Configuring Siebel Open UI*.

This topic is part of "[Siebel Open UI Server Deployment Characteristics](#)" on page 4-10.

### Related Books

*Configuring Siebel Open UI*

## Migration Tasks for Siebel Open UI

This topic provides information about some of the migration tasks that you might need to perform when you are deploying Siebel Open UI. It contains the following information:

- ["Using Legacy Browsers When Migrating to Siebel Open UI"](#) on page 4-17
- ["Migrating SRF Files and SWT Files"](#) on page 4-18
- ["Migrating Browser Scripting"](#) on page 4-18
- ["Migration Options for Siebel File System Features in Siebel Open UI"](#) on page 4-19
- ["Behavior of Standard Interactivity Views in Siebel Open UI"](#) on page 4-20
- ["Migration Options for Siebel Calendar Features"](#) on page 4-21
- ["Migrating Siebel Portlets"](#) on page 4-21
- ["Migration Options for Standard Interactivity Portals"](#) on page 4-21

### Related Books

*Configuring Siebel Open UI*

## Using Legacy Browsers When Migrating to Siebel Open UI

Migration to Siebel Open UI can be achieved while retaining an existing Siebel CRM deployment, with minimal development effort. If the migration is planned properly, then the addition of a Siebel Open UI deployment does not have to affect your existing deployment.

Review the following options for deployments that currently use legacy browsers, which have conformance and performance limitations:

- Deploy one or more browsers specifically for use with Siebel Open UI applications, which conform to the required browser standards. A third-party product, such as Browsium Catalyst, can route traffic to specific browsers, based on enterprise requirements.

- Continue to deploy high interactivity Application Object Managers for users that have support available for legacy browsers only.
- Continue to deploy standard interactivity Application Object Managers for users that have older browsers.
- Consider using a Web browser layout engine plug-in that meets standards and performance requirements to update browsers to fast versions.

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**Note:** Third-party products, such as plug-in solutions, are solely dependent on the third parties building them. Oracle has no part in the support of those solutions.

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You must take into account the constraints of the browsers that are supported by each client. The Siebel Open UI client requires standards-compliant browsers, while the Siebel high interactivity client requires Internet Explorer 8 or earlier. Installing multiple browsers and meeting both requirements allows users to switch back to the legacy deployment and to use the appropriate browser in each case. If browser constraints are considered properly, then there is no risk in maintaining both environments until user acceptance tests are completed with successful results.

For more information about running high interactivity clients in an environment that supports Siebel Open UI, see *Siebel Open UI Deployment Guide*, 1499842.1 (Article ID) on My Oracle Support.

This topic is part of "[Migration Tasks for Siebel Open UI](#)" on page 4-17.

### Related Topics

["Browser Standards and Performance Requirements"](#) on page 4-8

## Migrating SRF Files and SWT Files

In general use cases, it is not necessary to recompile the SRF to run Siebel Open UI, apart from exceptions mentioned in this guide.

You can store Siebel Web templates (SWT files) in the new location for custom Siebel Web templates or keep them in their existing location. Moving the files to their new location is described in *Configuring Siebel Open UI*.

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**Note:** For the current release, Siebel Tools does not support SWT work with browsers other than Microsoft Internet Explorer. Additional limitations apply to previous Siebel CRM releases. For more information, see *Siebel Open UI Deployment Guide*, 1499842.1 (Article ID) on My Oracle Support.

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This topic is part of "[Migration Tasks for Siebel Open UI](#)" on page 4-17.

## Migrating Browser Scripting

It is not necessary to change your existing client-side browser scripting to run Siebel Open UI. However, to make sure that your applications work the same in multiple browsers, you must make sure that no browser-specific JavaScript is implemented in your existing browser scripts.

Specific methods in Siebel CRM have been enhanced or changed for a variety of reasons, including security. These methods, which apply to all user interfaces, include the following:

- **WriteRecord.** For more information, see 1551530.1 (Article ID) on My Oracle Support.
- **SetProfileAttr.** This method has been disabled for HTTP calls, for security reasons. By default, a browser script that references SetProfileAttr will not work. You can override this change, although doing so reintroduces the security vulnerability. Any decision to override must be done after careful consideration of the risks. To activate access to SetProfileAttr, set the server parameter EditProfileAttr to True.

This topic is part of "[Migration Tasks for Siebel Open UI](#)" on page 4-17.

## Migration Options for Siebel File System Features in Siebel Open UI

W3C-based client applications typically run inside of a Web browser container and, for security reasons, are limited in their interactions with client-side applications and files on user computers. Conforming to a Web-standards approach dictates or suggests specific recommendations for designers of hosted deployments involving Siebel Open UI applications and documents or templates that use either structured or unstructured data.

Current Siebel Business Applications features for correspondence, for example, also force a change in the interaction between the user and the Siebel Open UI client, regarding legacy client-side proprietary document formats and applications.

For example, if a user tries to drag an email from Microsoft Outlook into the Siebel client, in order to save it as an attachment in the Siebel File System, then this operation cannot be completed. Such applications typically use different drag-and-drop methods and storage structures than those of the operating system itself. Before the user can save an item (such as an email message) into the Siebel application as an attachment in the Siebel File System, the user must save it as a file in a local or network directory.

Where Java Runtime Environment is present on the user computer, however, attachment files can be saved directly to the Siebel application.

Consider the following recommendations to make it easier to manage data and user interactions of these types:

- Where possible, integrate Siebel Open UI applications with true W3C-compliant client applications or hosted applications, such as Microsoft Outlook Web Access. Such applications can be integrated by using Web services on the back end or by using the JavaScript API on the client side, depending on the business requirements. Integrating with true Web-based client components can simplify many deployment challenges.
- Application designers might consider moving content that currently uses attachments based on proprietary document formats and applications into structured or unstructured data fields that use Web-centric formats such as XML or HTML. This approach:
  - Allows content to be formatted using Siebel Document Server or Oracle Business Intelligence Publisher.
  - Supports audit trails and approvals as content is changed and added by users.
  - Can make it unnecessary to manage content in documents. However, separate physical documents can be created as needed when content creation or revision is complete.

- Can make it easier to search the modified content.
- Users must have locally available a directory, on the network or on the local computer (for example, a laptop), in which they can store modified files or content dragged from applications like Microsoft Outlook. Then they can save such files into the Siebel application as attachments in the Siebel File System.

This topic is part of "[Migration Tasks for Siebel Open UI](#)" on page 4-17.

### Related Topics

["Comparing Features Between Siebel Open UI and the Traditional Clients"](#) on page 4-3

## Behavior of Standard Interactivity Views in Siebel Open UI

The high interactivity client can display certain standard interactivity applets. However, Siebel Open UI does not support standard interactivity applets. When you convert a high interactivity application to Siebel Open UI, specific rules apply for converting any standard interactivity applets.

Siebel Open UI supports the following scenarios only when EnableOpenUI is set to True and HighInteractivity is set to True. If EnableOpenUI is False (Siebel Open UI is disabled), then all legacy checks apply. A standard interactivity applet is handled as follows in Siebel Open UI:

- **Applet with no business component.** An applet that does not have a business component upgrades automatically to Siebel Open UI. A standard interactivity applet has no custom renderers.
- **Applets outside of a view.**
  - An applet that is standard interactivity only because of it is outside of the view (although all other conditions pass for RIA qualification) upgrades automatically to RIA. (RIA is rich Internet application, and represents the Siebel application display mode for Siebel Open UI.)
  - An applet that is outside of the view and has custom renderers attached is blocked.
  - Applets with renderers as base standard interactivity renderers (CSSPopupSIRenderer, CSSListPopupSIRenderer, CSSHtmlSIRenderer) upgrade automatically to high interactivity, to the extent possible.
  - An applet that was standard interactivity only by the class definition in the repository is the best candidate for a straightforward conversion. Such applets upgrade automatically to RIA. Rendering might not be complete, because features such as links might not be fully supported. Recent records applets are implemented in Siebel Open UI as client-side artifacts, for example.

If a view has multiple applets with a combination of standard interactivity and high interactivity applets, then high interactivity applets are rendered and each standard interactivity applet is rendered as a rectangular outline containing a yellow exclamation point. In this use case, the image shown with a tooltip explanation is rendered to inform the user that the applet cannot be rendered.

For more information about converting standard interactivity applets to high interactivity for use in Siebel Open UI, see *Configuring Siebel Open UI*.

This topic is part of "[Migration Tasks for Siebel Open UI](#)" on page 4-17.

## Migration Options for Siebel Calendar Features

The Siebel Open UI calendar has been enhanced to provide additional capability. Workaround options are available to allow you to retain legacy calendar behavior in the Siebel Open UI client. For more information about these options, see *Configuring Siebel Open UI*.

This topic is part of "[Migration Tasks for Siebel Open UI](#)" on page 4-17.

## Migrating Siebel Portlets

You can migrate Siebel portlets to Siebel Open UI. Siebel Web Engine (SWE) APIs provide an interface to deliver data and metadata content. The SWE XML features are not available in Siebel Open UI. For more information, see *Siebel Portal Framework Guide*. See also *Configuring Siebel Open UI*.

This topic is part of "[Migration Tasks for Siebel Open UI](#)" on page 4-17.

### Related Books

*Siebel Performance Tuning Guide*

*Configuring Siebel Open UI*

## Migration Options for Standard Interactivity Portals

If you use standard interactivity portals and want to use Siebel Open UI features, then several migration alternatives are available to you. Standard interactivity applets and functionality can, with a little effort, be switched to high interactivity, so they can render in Siebel Open UI. You can decide between the following options, each of which has advantages and disadvantages:

- Perform manual tasks to migrate standard interactivity applets to high interactivity.
- Use new features or applications that extend the customer-facing options in Siebel Open UI.

For example, new application features are available in Siebel Self Service Portal for Siebel Open UI and Siebel Partner Portal for Siebel Open UI. For more information about these new applications, see "[Siebel Business Applications That Require Siebel Open UI](#)" on page 2-4. See also "[Related Information About Deploying Siebel Open UI](#)" on page 2-5.

- Continue using the standard interactivity applications.

This topic is part of "[Migration Tasks for Siebel Open UI](#)" on page 4-17.

## Integrations Related to Siebel Open UI

This topic provides information about certain types of integrations in relation to Siebel Open UI.

## Siebel Open UI and Oracle User Productivity Kit

Integrations for Oracle User Productivity Kit (UPK) version 11.1.0.2 support the Siebel Open UI client. If you are running Siebel Open UI applications, then you can record Oracle UPK content against Siebel Open UI and you can display this content in a context-sensitive manner, just as you could using the high interactivity client. Oracle UPK can be an alternative to iHelp in Siebel Open UI environments. For more

information about supported browsers, see Resources, then Technical Specifications in the following site, and then review the target applications technical specifications.

<http://www.oracle.com/us/products/applications/user-productivity-kit/overview/>

## Siebel Open UI and Oracle Policy Automation

Integrations for Oracle Policy Automation with the Siebel Mobile Web Client and Siebel Remote support Siebel Open UI. For more information about such integrations, see the topic about invoking Web services on the Siebel Mobile Web Client in *Integration Platform Technologies: Siebel Enterprise Application Integration*.

## Siebel Open UI and Siebel Product Configurator

The Siebel Product Configurator displays a native user interface within Quotes, Orders, Agreements, and Assets, and it is fully supported in Siebel Open UI. Siebel Open UI supports all of the documented user interface features that are found in the high interactivity client, with some exceptions.

The Siebel Product Configurator administration functionality in the Administration – Product screen, Definition view is not currently supported in Siebel Open UI. It is recommended that you use the high interactivity client to perform tasks for administration. To make changes to a model, use the high interactivity client and navigate to the appropriate administration views.

## Siebel Open UI and Test Automation

Functional test automation using Siebel Test Automation (STA) that you previously used for Siebel high interactivity applications cannot be used for Siebel Open UI deployments. The following options are available for providing test automation for Siebel Open UI:

- Use Oracle's Web standards-based test automation interface to build a test automation integration.

Siebel Open UI supports test automation with any test automation suite that can support automated testing using true Web standards-based applications. Although these interfaces are rudimentary, they provide many capabilities that are required for basic task automation.

- Use Oracle Automation Test Suite (OATS) with the new application programming interface, Siebel Test Automation for Open UI (STAO).

For the current release and later, Siebel Test Automation for Open UI (STAO) provides a set of test automation libraries to support functional testing of Siebel Open UI applications. Siebel Test Automation for Open UI is distributed with, and requires, Oracle Automation Test Suite (OATS). Test automation scripts must be recorded using the new test automation framework.

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**Note:** You cannot use Siebel Test Automation for Open UI (STAO) with Siebel Test Automation (STA) or with third-party test automation solutions.

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- Use a solution provided by Oracle partners that is built on Oracle's public test automation interface.

For more information about the Oracle test automation options listed here, see *Siebel Open UI Deployment Guide*, 1499842.1 (Article ID) on My Oracle Support. For more information about the API for Siebel Test Automation for Open UI (STAO), see *Configuring Siebel Open UI*.

**Related Books**

*Configuring Siebel Open UI*





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