

Oracle Siebel CRM

Release Updates (2018)

Oracle's Siebel CRM Release Updates introduced new features and enhancements during 2018 that improve business agility, developer experience and deliver user experience benefits for all types of roles. The new features continue to reduce the total cost of ownership for organizations using Siebel CRM. Siebel Composer continues to evolve, with enhancements to Web Tools, Workspaces and Parallel Development. Crucially, a new Continuous Release Model provides the capability for true agile delivery with cumulative Release Updates incorporating features and bug fixes on a monthly schedule and a move away from a single, annual release cycle. This paradigm shift allows us to deliver innovation much faster to our customers and for our customers to be more agile.

INNOVATION THEMES

The Siebel CRM product focuses on the following primary investment themes based on the feedback of our customers:

- **Autonomous CRM.** The path to an autonomous or self-driving Siebel CRM system is multi-faceted and relies heavily on making intelligent use of data.
- **Business Agility.** We recognize that your business needs to be agile with the ability to adopt new product innovations as well as competitive market solutions into your CRM deployment quickly
- **Customer Experience (CX).** Improved application user experience, developer experience as well as extending customer experience with the Oracle CX portfolio (mobile, social, service, etc.)
- **Industry Innovation.** Feature-rich solutions for 21 industries, as well as industry-specific mobile applications.

Siebel CRM integrates with the Oracle Cloud CX suite including Oracle Engagement Cloud, Marketing Cloud, Social Cloud etc. and other ecosystem cloud products to enable modern features, creating complete and memorable customer experiences.

Siebel CRM

- The most adaptable CRM solution available for On-Premise and On-Cloud
- Siebel CRM plays an important role within all of Oracle CX combining to deliver customer experience across multi-channels such as mobile, in-store, field service, etc.
- Core CRM system that leverages a large breadth of different Oracle best-of-breed foundation tools.
- Industry solutions with specific, tailored capabilities
- 22 languages supported in a single application repository
- Siebel CRM complements Oracle Cloud solutions, enabling businesses to choose the solution that's right for them.
- Siebel CRM is now available to be deployed On-Cloud with the Oracle Infrastructure-as-a-Service (IAAS) platform.

AUTONOMOUS CRM

The automation imperative continues to require CRM systems to focus on superior customer experience. As we move from the manual digital phase (self-service, mobile) to the increasingly data intensive and automated (Social, IoT), we are being driven to position Siebel CRM on the combination of usage data with pre-built processes.

The Usage Pattern Tracking feature introduced in Innovation Pack 2016 was the first step to automating processes inside the application. Enhancements to the RESTful API in 2018 provide more flexibility to enable different types devices to interact with the Siebel CRM application. These recent enhancements are building blocks towards the execution of recorded process flows in an automated manner. The autonomous execution of processes in Siebel CRM is a key area of focus going forward.

BUSINESS AGILITY

Siebel Composer Evolution

Siebel Composer continues to evolve with new features added.

Siebel Web Tools

In 2018, the following features are added that were not previously available:

Layout Editors for View and Applet UI creation, offering functional parity with Siebel Tools, along with some enhancements.

View Designer

The View and Applet Layout Editors provide an intuitive, graphical drag and drop canvas for creating application Views and Applets.

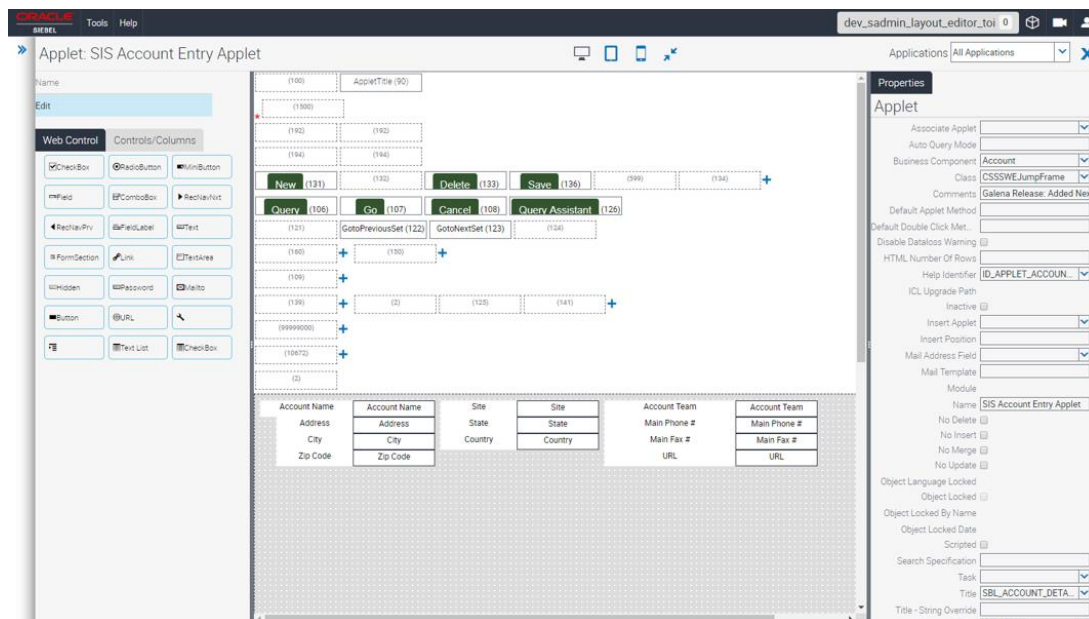


Image 1: Web Applet Designer

Developer Experience

- Drag and drop canvas for browser based development without the need for a local Tools installation footprint
- Easily visualize your changes across the different device form factors by switching the display using device icons
- Object Explorer can be hidden to extend the developer canvas and provide more space

Parallel Development using Workspaces

This enhancement enables the Workspaces framework to support parallel, multi-release development. To help support these complex deployments, Also introduced is a framework that will allow customers to enable Workspaces for List of Values (LOVs). This data when included in Workspaces will allow the LOV data to be shared across instances.

Workspace Performance Tuning

Performance tuning of Workspace queries across all Workspace operations particularly Full Publish, Repository navigation, Deliver, etc., primarily to address performance on DB2, but most of the optimizations are generic and applicable to all databases.

Siebel CRM High Availability Architecture / Siebel CRM Gateway Clustering

The Siebel Gateway now supports application clustering in order to ensure that the Gateway is highly available and fault-tolerant leaving no single points of failure.

Siebel Gateway clustering includes clustering of the Gateway Service as well the underlying Gateway Registry which acts as dynamic configuration store. Gateway clustering can be configured and deployed via Siebel Management Console (SMC).

Siebel Gateway Service Registry and Discovery Framework

The Siebel Gateway provides a built-in Service Registry and Discovery framework to enable elastic load-balancing for various components of the Siebel Enterprise. The framework offers the following capabilities:

- Ability for services to register/deregister themselves to the service registry with name, keys, server name, connect string and maximum load.
- Ability for services to update their load information with the service registry.
- Interface to discover a load-balanced service endpoint.
- Interface to monitor the services.

Siebel Management Console (SMC)

The Siebel Management Console (SMC) is enhanced with server configuration and server administration functionality in order to serve as a one-stop console for end-to-end deployment and management of the Siebel Enterprise. Guided server configuration flows, context based validations, and an intuitive user interface will help Siebel Administrators improve their productivity.

New SMC server configuration functionality includes:

- Configuring the Siebel Enterprise Server – Configuring Component Groups, Component Definitions, Parameters, Named Subsystems, etc.
- Configuring the Siebel Server – Enabling/Disabling Component Groups on a Siebel Server, Configuring Server parameters and Component parameters, etc.

Continuous Release Model

A more streamlined application update process has been introduced for the Siebel CRM application. This new approach enables any release to include binary based quality updates, delivered previously in patch sets, and binary plus metadata-based features, previously delivered only in Innovation Packs.

The new Siebel CRM continuous delivery model allows new features and innovations to be delivered more frequently.

The key changes and benefits are as follows:

- All future features and fixes to be delivered in “Updates”, these are similar to Patch Sets but may also contain innovations.
- Siebel CRM Updates also provide documentation for features delivered, The “Siebel CRM Statement of Direction” (SOD), provides a roadmap of what is intended to be delivered in the calendar year (or period as otherwise detailed in the SOD).
- The naming process is more logical and related to the date of release, so an update in April 2018 is simply be called 18.4. While the product updates delivered throughout 2018 are generally referred to as “Siebel CRM 2018 Release Updates”.
- The new delivery model began with our 18.4 Update. 17.6 was the last “Patch Set” and 18.4 was the start of “Updates”. Note that a customer moving from 17.6 to 18.4, is simply applying an update, like a patch, this is not an upgrade (no IRM process or repository changes). Updates may still require IRM to be used. Updates are cumulative from the IP2017 release.
- The Update model ensures customers on 17.x and above will never run out of maintenance updates for their release. The concept of 18 months of error correction no longer applies.
- This greatly simplifies the application update process, reducing maintenance costs over the old application upgrade approach. This approach allows us to provide additional improvements and new features related to functional and security improvements.
- There are no major changes for our customers on Innovation Pack 2017 with the new process, other than the fact that they can look forward to a more continuous delivery in the future.

Application Migration

The Siebel Application Migration framework has been enhanced in 2018.

Asynchronous Migration Infrastructure for Dev2Prod

The 17.0 Migration application had a mandatory requirement of having both Source and Target alive and available when a migration plan was created, which did not reflect the real-world deployments that our customers use in a Dev2Prod scenario. There are restrictions of access for both Source & Target applications viz., Development and SIT, QAAT, Pre-Prod or Production, due to network/firewall restrictions.

The de-coupled architecture eliminates the dependency of source and target during connection and migration plan creation. This provides great flexibility to customers and benefits around governance, different network infrastructure and access control and permissions of their NAS and central file shares.

REST API Enhancements

Features delivered in 2018 to enhance the usability of the Siebel REST API:

- Control the list of fields returned by a REST request.
- Specify a subset of child links to limit the scope of data returned.
- Specify a View Mode to restrict the records returned by the REST request

Continuous Release Model

- Cumulative delivery of bug fixes and features
- Always take the latest Update when you are ready
- Agile not waterfall – allows features to be delivered when they are completely ready
- Customers to not have to wait 1 year to receive a feature, as was the way with the old Innovation Pack approach
- You decide your agile approach to updating Siebel CRM, you can still continue to operate with larger, annual updates or become more agile, with smaller impact, more frequent monthly updates to your application.

- Uniform REST Response - To ensure that the REST response is always returned in Array format even when there is a single element.

Expose Migration Application invocation via REST

Features delivered to enhance continuous delivery:

- Setup Migration via REST (Source, Target, Migration Plan)
- Kick off Migration Execution via REST Call

Mobile Application Framework

The Siebel Mobile Framework is enhanced to provide a more consistent user experience whether working online or offline and to ensure the minimum number of gestures (clicks, taps, etc.) is required to complete a task. The key abilities provided in the enhanced framework are:

- Creation of new records to support M:M relationships in the association applet. A user is able to create a brand new record in the association applet which is exactly the same behavior as online and help reduce the number of clicks for the user. This will reduce the number of gestures required to create a new child record under an existing parent record in many to many relationships by 30%.
- Multi-field queries in the offline application – Users are able to perform a multi-field query to search for specific records based on the user criteria similar to online experience.

Platform & Certification Updates

Database Certifications

New certification updates for 2018 include:

- DB2 LUW 11.1
- Oracle 12cR2

Tomcat Upgrade

Upgraded Tomcat version 8.5.23 to mitigate security issues in the earlier versions of Tomcat; and ensures Tomcat servers run as a service so that they start automatically after the system starts.

3rd Party Plug-in Upgrades

New certification updates for 2018 include:

- Upgraded third party plug-ins which are used in Open UI core framework with the approved version for 18.x

For the latest certifications please review MOS Certifications for the latest integrated third parties, please review

Upgrade / Incremental Repository Merge (IRM) Support

The Siebel CRM IRM/upgrade support matrix for Siebel CRM 2018 Release Updates will include full and direct upgrade/IRM support from the following prior releases. Every other release will have a two-step upgrade support.

Source Version***	Target Version	Upgrade	IRM	Approach	Description
17.0 – 17.6 18.4-18.12 19.1-19.x	19.x		✓	Single Step Incremental Upgrade	Apply the 19.x update. In some cases, depending on the content in the Update to uptake, an IRM (Incremental Repository Merge) process may be required.
16.0 – 16.x 15.0 – 15.x 8.2.2.0 – 8.2.2.4 8.1.1.0-8.1.1.14 SIA 8.2.1.x SIA 8.2.x SIA 8.1.1.0-8.1.1.7 SEA	19.x	✓		two Step Upgrade	Install 17.0 binaries Perform a full database upgrade (Development Upgrade + Production Upgrade) → Post upgrade, the New Customer repository generated through 3-way repository merge contains all the release content of 17.0. Apply the 19.x update
8.0.x SIA / SEA 7.8.2.x SIA / SEA 7.7.2.x SIA 7.5.3.x SIA	19.x	✓		Three Step Upgrade	Perform full upgrade to 8.1.1 SIA base release Perform IRM patch from 8.1.1 SIA to 17.0 Apply the 19.x update
7.5.3.x SEA 7.7.2.x SEA	19.x	✓		Three Step Upgrade	Perform full upgrade to 8.1.1 SEA base release Perform full upgrade patch from 8.1.1 SEA to 17.0 Apply the 19.x update

***For more information on SEA and SIA Siebel CRM releases, please refer to My Oracle Support article [1514115.1](#).

CUSTOMER EXPERIENCE

The following features pertaining to customer experience were delivered in 2018.

Open UI Theme

A new Sky Blue is an optional new theme which provides consistency with the Oracle CX Cloud applications. To set Sky Blue as the default theme, set the Navigation setting to Tab and Theme to Sky Blue in the User Preferences screen. The changes will be visible next time you login to the Siebel CRM application.

Open UI Charts

Previously, OpenUI charts were rendered using jqPlot. Though superior in many aspects, jqPlot based charts had some limitations. Users were not able to control the visibility through zoom-in / zoom-out. To change the look and feel, developers had to modify the behavior through Siebel Tools for each chart.

New features introduced in 2018 are Responsive Charts, using the Data Driven Documents (D3) based charting engine. With this, Siebel CRM continues to provide pre-built industry based charts with enhanced user experience.

With Responsive Charts, customization is easy since they are backed up by HTML5 and CSS for the styling of charts. They are responsive across form factors and with zoom-in / zoom-out support which will be useful on many touchscreen devices.

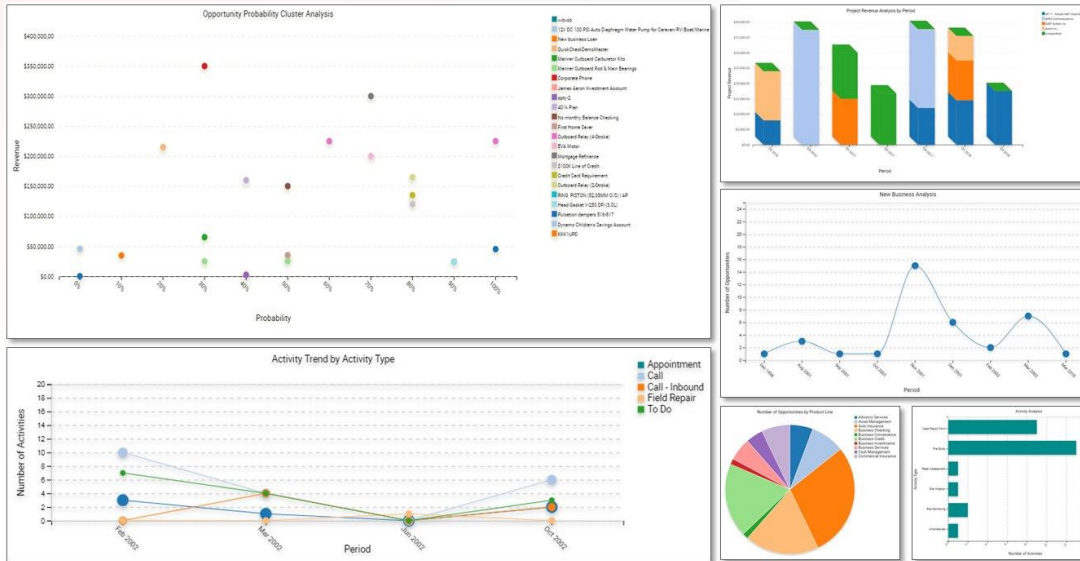


Image 2: OpenUI charts using the D3 charting engine

To improve user experience for more complex charts, we have improved the efficiency for aggregated data functions such as SUM, AVERAGE, and COUNT. Previously, these aggregation functions were done at the Business Component level (on the data already fetched from the database query). These functions are now modified to perform database-based aggregation, resulting in the rendering of large data volume aggregations within milliseconds.

The same search specification, as applied on the list applet, is used to fetch the aggregated data for the chart applet. Moreover, users can drilldown on charts which results in a new aggregation query to refresh the chart. Aggregations at database level for enhanced performance and handling large volume of data include aggregations based on:

- Period (records aggregated based on Week, Month, Year)
- Single / Multiple Attributes
- Multi Value Fields (M:M relationships)
- Group by value
- Calculated Fields
- Range values

Charts can also be built based on the data from external sources via Virtual Business Component (VBC).

- Note: There will be few scenarios where we Object Manager aggregation is necessary instead of Database aggregation. The Database aggregation based on calculated fields, calculated expressions as part of the Business Component Search Specification or Virtual Business Components are not supported with this new feature.

INDUSTRY INNOVATION

Industry-specific innovations introduced in 2018 are described below.

Siebel Clinical Trials Management System (CTMS) 18.0 eTMF Integration

Integration with eTMF systems to publish trip reports to eTMF, with a direct URL link in CTMS. This improves user experience and reduces clicks when navigating between applications.

Siebel Consumer Goods – Simplified Join Promotion Group

Improves usability when associating new members (with new or pre-existing services) to existing Promotion Groups.

- Reduced number of click streams with the new flow when compared to the existing flow.
- New flow is simpler and more intuitive.

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