ORACLE

Oracle Siebel CRM Release Updates (2022)

Oracle's Siebel CRM Release Updates in 2022 continue to deliver ROI and economic value. New innovations have become faster and easier to adopt for organizations using the latest Siebel CRM releases.

Features released in 2022 across the three innovation themes improve Agilty, UX, Integration and simplify Cloud technology adoption.

Siebel CRM Release Updates have been widely adopted by customers on our latest release.

The growing trend for customers on the continuous release model is to update their Siebel CRM deployment every 3 months.

INNOVATION THEMES

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

Core Technology. We recognize that your business needs to be agile with the ability to adopt new product innovations and to release competitive market solutions into your CRM deployment quickly. Our customers also want deployment choices: on-premise, cloud public/private or hybrid distributed clouds. As automated software processes and intelligence become pervasive, we recognize that this approach is multi-faceted through CRM and relies heavily on making intelligent use of data.

Customer Experience (CX). Improved application user experience, mobility, developer experience as well as extending customer experience functionality with Oracle CX solutions (sales, marketing, service, commerce etc.).

Industry Innovation. Feature-rich solutions for 21 industries are constantly being updated to leverage cross-industry innovations. Given Oracle's Siebel CRM industry pedigree, it plays a key role in Oracle's end to end industry solution strategy. A modernization of industry applications, API's and core platforms that link front and back office with business processes based on industry standards and best practices.

Siebel CRM Release Updates in 2022 applied using the Continuous Release Model demonstrate that customers can adopt new features without performing an application upgrade.

CORE TECHNOLOGY

Web Tools

New features were added into Web Tools that continue to improve developer experience, productivity and reduce cost.

Web Tools Task Editor

This feature provides a rich, drag-and-drop editor for Tasks (TBUI) using Web Tools. Developers will now perform the majority of work in Web Tools for Tasks (this means fewer switches between Siebel Tools and Web Tools) making development faster and providing a better user experience.

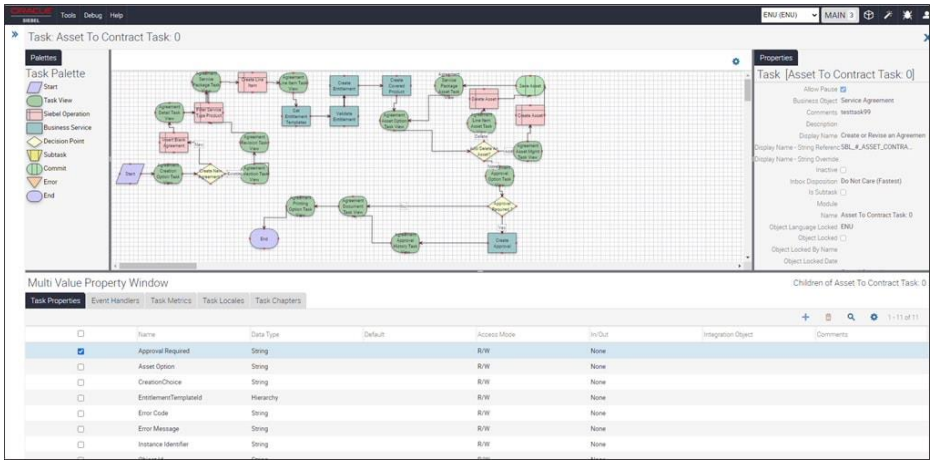


Image 1: The new Siebel CRM Web Tools Task Editor

More features are added to Web Tools and Workspaces, improving Task development and migration.

Enable Workspaces for Siebel Tasks

This feature allows for the parallel development of Tasks (TBUI) which improves developer productivity leading to lower costs. Configured Tasks will also be more stable due to multiple opportunities for validation of the configuration.

Repository Object Validation in Web Tools

Developers can validate repository objects by examining them using a set of rules to ensure Oracle-recommended configuration best practices.

Migration Execution Management and Cleanup

This feature enhances the capabilities of the Siebel Migration Application, making it easier for administrators to manage Migration Plan execution and history, and includes the following new capabilities:

- Ability to stop a running Migration Plan
- Cleanup of failed Migration Execution
- Execution History querying and cleanup

Task Editor and Workspace enablement are welcome additions to the Web Tools IDE.

Using existing Integration Objects to support new outbound Web Services

This feature replaces Integration Objects created when importing an outbound Web Service with more efficient, existing Integration Objects. This makes the outbound Web Service calls faster because no mapping between Integration Objects is necessary.

Integration

Features delivered to enhance the Siebel CRM REST API:

Support for Siebel REST API Descriptions in OpenAPI 3.0 Format

This feature returns, via REST, descriptions of Siebel objects and APIs in OpenAPI format allowing developers to integrate applications with Siebel in OpenAPI 3.0 format.

Exposing Siebel Workflows via Inbound REST API

This feature provides a simple RESTful interface to run Siebel Workflows via inbound API calls, allowing applications that integrate with Siebel CRM to increase the scope and interactivity of the integration.

Using HTTP calls that provide the Workflow name in the URL along with various input properties in the HTTP body, it is now possible to invoke complex operations defined in Siebel Workflow Processes.

Example REST call to a Siebel Workflow process:

https://ServerName:port/siebel/v1.0/workflow/ISS Promotion WS - ApplyProductPromotion - Order

This example REST API call invokes a workflow named "ISS Promotion WS - ApplyProductPromotion - Order", which does complex operations like adding an instance of a promotion along with default components to a quote or an order.

Enhancements to the REST API make it really easy to integration Siebel CRM with other applications – both on-premise and in the cloud.

REST API for Deletion of Loyalty Member

This new REST API will help you address Global Data Protection Regulation (GDPR) compliance requirements. It will allow you to delete member data along with member-associated data for transactions, accrual items, membership cards, activities, vouchers, and service requests.

Automation

Test Automation

The Test Automation framework is further enhanced, improving usability and agility with the following new features:

Siebel Test Automation Parallel Runs on the same Client and REST API Testing

Siebel Test Automation capabilities are extended to now allow for parallel execution. Lights-out automation now includes executing one batch run at a time to multiple parallel batch runs on the same DISA client. Each batch-runs as a parallel but isolated browser session on the same DISA client without impacting other sessions running in parallel.

Improving Test Automation functionality in Siebel CRM is a key focus as we strive to minimize the downtime and cost of application updates via CI/CD pipelines.

The key benefits of parallel runs are a maximized utilization of compute resources and a minimized overall cycle time. For example, based on VM capacity, 3 to 5 threads can be run in parallel, instead of sequentially. With the parallel runs capability, the number of DISA installations and setup are reduced by an order of magnitude, reducing TCO significantly.

In addition, a new capability to test or issue REST API calls using a new keyword is also provided, with abilities to execute API, verify and/or use the response. Significant benefits with this include reduced complexity and effort in automating REST APIs and integrations for automated testing.

Enhanced Test Automation Log Reporting with JSON

Detailed Siebel Test Automation result reports have been extended from the existing HTML format to include the JSON format. The key benefit with JSON format is that

the results can be easily consumed by other tools, for example in CI/CD pipelines, test management tools, etc.

In addition, a new Report.html built using the JSON format is provided with significant enhancements over the existing Master Suite report. Improvements include the layout, consolidated snapshot, and detailed failure analysis.

Installation and Deployment

Siebel Cloud Manager

Siebel Cloud Manager (SCM) is an automation tool specially designed for customers to simplify the "lift and shift" of their existing Siebel Enterprises from the current source system infrastructure into OCI, with all their customizations intact.

Apart from a "lift and shift" of the current Siebel CRM deployment, SCM also can serve to deploy new Siebel CRM environments within OCI along with the continuous deployment of artifacts through GitOps pipelines, that will continue to be defined.

The initial feature set of Siebel Cloud Manager includes:

- A tool set which can be retrieved from the Oracle Cloud Marketplace and deployed directly into a customers OCI tenancy
    - A "Lift" automation tool which enables the packaging of the necessary Siebel CRM "artifacts" within the Siebel Enterprise (source) for migration to the customer's OCI tenancy.
    - The "Lift" tool will be initially retrieved from the particular SCM instance within the OCI tenancy where the customer deployed the SCM via the Oracle Cloud Marketplace.
    - Customers can then migrate Siebel CRM "artifacts" to the Object Storage within their OCI tenancy via the migrations tooling that OCI makes available.
    - The "Lift" tool can be targeted at any Siebel Enterprise deployed with either Windows or Linux/Unix.
    - The oldest Siebel CRM Update that can be migrated with SCM is 18.12.
- The "Shift" tool which enables the deployment of the Siebel CRM "artifacts" that have been migrated to the OCI object storage within their tenancy. This process deploys the Siebel CRM environment that they migrated from the source system (On-Premise or other clouds).
    - The Siebel Enterprise deployed within their OCI tenancy compartment will be a container based Linux environment running within Oracle Kubernetes Cluster on top of an Oracle Autonomous Database.
    - The tool uses Kubernetes and Ansible automation tools supplied within OCI to deploy the "shifted" Siebel Enterprise to the targeted OCI compartment.

Siebel Cloud Manager not only simplifies and reduces the time to move a Siebel deployment into an OCI tenancy - it can create a container based environment running with Oracle Kubernetes.

Additional features of the initial version of the SCM are listed below:

- Deployment of a base Siebel Environment for any industry with either a "Sample" database or a "Vanilla" database. Note: This also will be a Linux based deployment using containers and with an Oracle Autonomous Database.
- Resetting the Administrative Password
- Changing the Log Level
- Checking the Status of a Request Environment
- Resubmitting the Environment Creation Workflow

Why Siebel Cloud Manager?

- Seamless and Secure Movement. The tool simplifies the transformation of the current configurations and securely moves all existing configurations to OCI with all customizations intact.
- Continuous Deployment. Deployment of new Siebel environments in OCI and continuous deployment of artifacts on the base Siebel CRM image.

Why Migrate Siebel CRM to OCI?

- Increase Flexibility. Develop, test, roll out and maintain your customized Siebel CRM environment to enable your organization's transition to the cloud.
- Optimize Resources and Cost. Effectively optimize the usage of cloud computing resources and benefit from the efficiency of Siebel Dev-Ops automation. Use what you need, when you need.
- Increase Agility. Fast track development and go to market of new application functionality in order to capitalize on new business objectives. Run multiple projects using the automated provisioning of environments.
- Scalability. Highly scalable through various resources available in OCI, by autoscaling the pods you can meet the needs and surge in workload or performance on an on-demand basis

If Siebel Cloud Manager is not a viable option for you – we have also simplified the process to migrate Siebel CRM deployments to Oracle Cloud Infrastructure virtual machines.

Bring Your Own Image (BYOI)

If your current Siebel CRM version is not compatible with the Siebel Cloud Manager (currently supports Siebel 18.12 or later), Siebel CRM workloads can now be migrated as-is from on-premises or any cloud platform to the Oracle Cloud using Bring Your Own Image (BYOI) feature of OCI.

The Bring Your Own Image (BYOI) feature enables you to bring your own versions of operating systems to the cloud if the underlying hardware supports it. BYOI eliminates the need for a fresh implementation of Siebel CRM on OCI. Everything from on-premises virtual machines moves to OCI as-is, reducing the overall migration effort and time.

The key benefit being that it shortens the duration to move to OCI.

For a more detailed information of the Siebel CRM BYOI Solution Playbook, please read here.

Scalability and Performance

Function Based Indexes for Oracle and DB2 Platforms

Function Based Indexes allow for searching to be performed on expressions rather than table columns to improve query performance. Common examples include: database functions such as UPPER(), TRUNC(), and SUBSTR(); mathematical expressions on columns, such as RATE * DAYS; or any other expression type permitted by the underlying database platform.

This feature provides the ability to define Function Based Indexes directly within the Siebel Repository. The key benefits include:

- Improved performance when a function-based index can be leveraged to avoid a full index scan and excessive database engine computation.
- Improved index functionality. Siebel CRM processes that currently handle traditional indexes will manage this new index type just like a traditional index, including functions such as "DDL Apply" and "DDL Generation", as well as utilities such as "DDLIMP", "Migration", etc.

NOTE: This feature applies only to Oracle and both DB2 platforms. Microsoft SQL Server does not support "Function Based Indexes" and will require a different approach.

Platform & Certification Updates

New certification updates delivered:

Support OAuth 2.0 with Siebel Email Response for Inbound Protocols IMAP/POP3

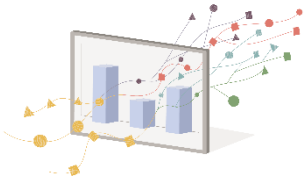
With this capability, you can use OAuth for inbound email channels—including IMAP and POP3—for Siebel Email Response with Microsoft's Office 365 email service.

OpenAPI 3.0 support for Outbound REST API

This feature allows the Siebel CRM application to use OpenAPI 3.0 support for the outbound REST API. OpenAPI 3.0 provides more extensive, robust security, and ensures that the Siebel CRM application can communicate to external servers using this modern protocol.

CUSTOMER EXPERIENCE

New features pertaining to customer experience were delivered in 2022.



Open UI Dashboards provide a more intuitive approach to consuming aggregated data and insight, often used to track KPIs and metrics relevant to core business objectives.

OpenUI

The following Open UI framework features have been added:

Configuring Multiple Customizable Products

A new Parallel Configuration UI enhances the user experience, making it easier and faster for you to switch back and forth when configuring multiple, highly complex, customizable products during an order capture process.

Data Visualization

Studies have shown that the human mind typically processes Images faster than text, and it is much more meaningful to translate data that is traditionally displayed in forms and spreadsheets into easily understandable visuals to see the “big picture” or convey the intelligence.

Dashboards

Dashboards provide a summary of the most important information for users. They cater to various user roles, channels, or organizations and can be tailored to accommodate the differences between various industries. In addition to prebuilt dashboards, our intention is to provide various visual elements needed to create these dashboards as quickly and efficiently as possible.

A key part of our design approach to Dashboards was to provide a framework that enables customers to build dashboards easily. Industry and persona examples with re-usable dashboard components makes it faster and more cost-effective to build Open UI dashboards.

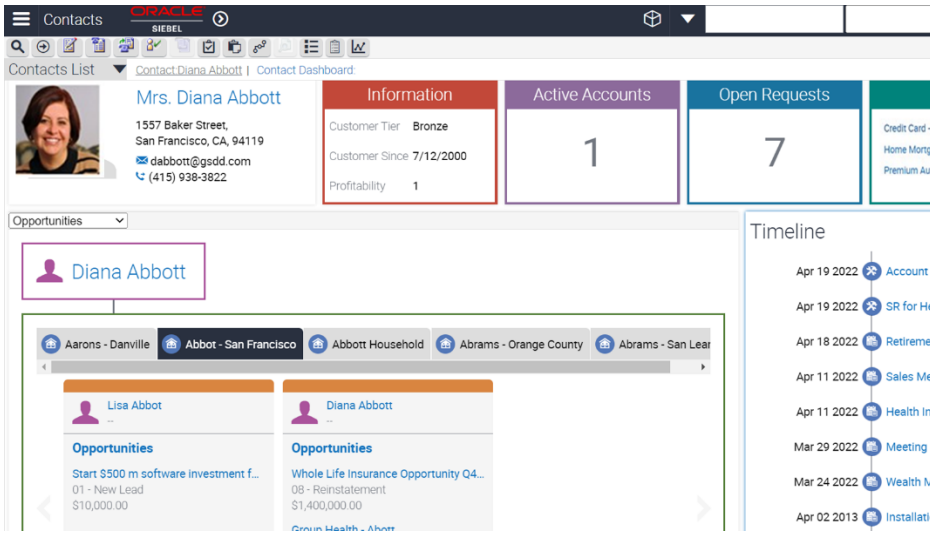


Image 2: Sample FINS Dashboard

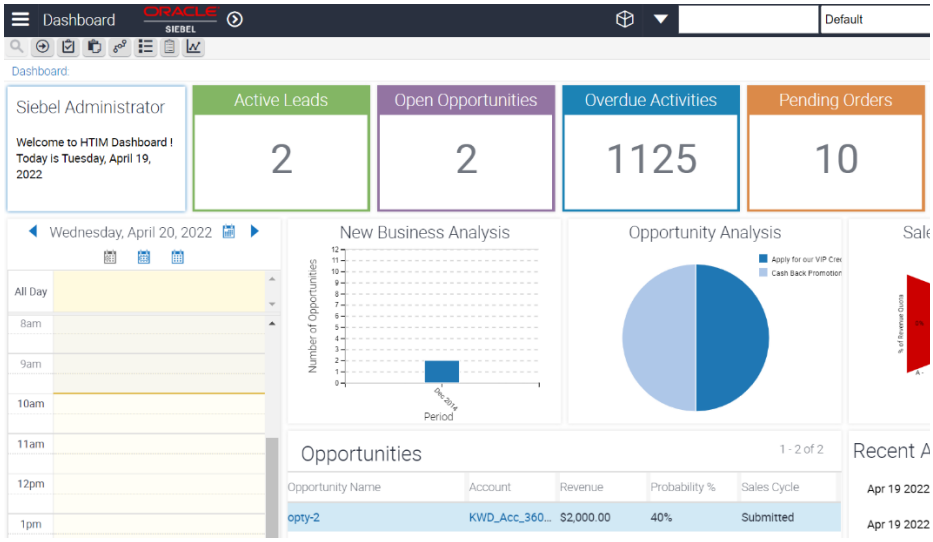


Image 3: Sample HTIM Dashboard

Visual Components

To accelerate the development of dashboards, a new set of visual components have been identified and will be introduced in the product:

- **Infolets**: Infolets provide an ability to display single value fields (such as Number, Text, Date) which can be drilled down to the relevant view.
- **Timeline**: Timeline view provides an ordered snapshot of interactions, based on the entities configured. Events from multiple entities such as Opportunities, Activities, Service Requests, etc. and can be configured by customers.
- **Hierarchy Control**: Display the data for four-level hierarchy components, such as Contact → Household → Household Contacts → Opportunities.

Artificial Intelligence

Artificial Intelligence Services for Siebel CRM

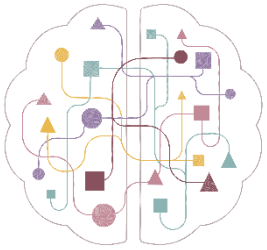
Oracle Cloud Infrastructure (OCI) AI Services are a collection of services with prebuilt machine learning models that make it easier for developers to apply AI to applications and business operations.

Two use cases of OCI AI Services in Siebel CRM are available as standard:

- Detect Personal Identifiable Information (PII): This AI service alerts the call center agent of any PII data entered in the Service Request Description field. This will prevent potential regulatory / data compliance issues.
- Transcribe speech to text: This AI service transcribes the recorded audio call received by the Call Center to text and attaches the text file to the Service Request automatically. Further intelligence can be automatically generated from the text to perform categorization, sentiment analysis, etc.

These standard services can also be configured using the out-of-the-box integration framework for customers' specific use cases based on any other entity/field in Siebel CRM. This solution is available with Siebel CRM deployed on-premise or on OCI.

For more information on A.I. Services available in Siebel CRM, please read here.



Artificial Intelligence services are consumed within Siebel CRM and can also be configured using the integration framework for customers' specific use cases.

Loyalty

Enhancing Siebel Loyalty with Oracle Crowdtwist

Oracle CrowdTwist helps in building relationships with customers beyond the point of transaction. This integration of CrowdTwist with Siebel Loyalty provides a complete, modern loyalty solution. It enhances the transactional loyalty solution that Siebel Loyalty provides with engagement and behavioral loyalty solution from CrowdTwist.

The integration between Siebel Loyalty and CrowdTwist leverages Oracle Integration Cloud (OIC) to support new engagement activities like survey, polls, quizzes, social connections, code redemption, automatic rewards, etc. It also adds new redemption options like sweepstakes, digital downloads and coupon codes for Siebel Loyalty customers.

For a more detailed review of this CrowdTwist integration, please read here.

A long standing best-of-breed CRM Loyalty solution continues to be enhanced – this time with the Oracle CrowdTwist integration providing engagement and behavioral loyalty calapbilities.

Promotion Rule-Based Rejection of Loyalty Transactions

This feature enables loyalty transactions to be rejected if certain conditions are met instead of taking that transaction forward. The transaction rejection functionality has been added into the promotion engine to reduce need for external validations. This will allow loyalty administrators to define promotion rules that would reject potentially fraudulent or nonrealistic transactions upfront before processing other rules.

Ability to Define Loyalty Points Effectivity for Accruals

As loyalty points are accrued, they are often required to be effective after a set period of time following the initial transaction. This new feature allows Loyalty Administrators or Program Managers to set different point-effective dates at promotion level. Point allocation can be set to become effective after a specified gap from the date of transaction processing.

Streamlined Loyalty Business Components

New, lean, Loyalty business components ensure a super-fast response for REST API calls performed against Loyalty member and transaction objects. These lightweight business components exclude the calculated fields as well as seldom used fields.

INDUSTRY INNOVATION

Industry-specific innovations delivered in 2022.

Pricing Administration REST APIs for Siebel Customer Order Management

Pricing Administration REST APIs for Siebel Customer Order Management that provide omni-channel ordering capabilities underpinned by a centralized catalog. Developers can now consume Pricing Administration APIs to simplify integration with a centralized product catalog like Oracle's LaunchX, a key component of the Digital Experience for Communications (DX4C) solution.

The REST APIs primarily include CRUD operations on pricing-related entities such as Attribute Adjustments, Discount Matrices, Aggregate Discounts and Sequences, and Commitment Terms with Contract Proration Schedule. The simplified integration will enable customers to create new product offerings faster, with a centrally managed product catalog, and thus reducing time-to-market.

In addition to the above, a QueryPage REST API to get Product Promotion details is provided.

Product Administration Super Users for Siebel Customer Order Management

This feature allows one or more product administrator super users to unlock versioned objects (for example, product, class, or attribute definitions, etc.) that have

been locked by other product administrators. Super users are supported in all channels for which a product could have been released (viz. Siebel UI, Business Service method calls, ADM import and Product publishing APIs).

Currently, only the user who locked the product versioned objects can unlock it. Even the Siebel Administrator, who is a super-user, cannot unlock the products locked by other users using any employee-facing application. If a Product Administrator who has locked a product (for making changes) is on leave or has left the company, all development activities are stalled, causing crucial delays in time-to-market.

Simplified Integration Approach for Oracle Intelligent Advisor

Oracle Intelligent Advisor (OIA) enables organizations to build interactive interviews based on business requirements, complex policy, and legislation. The Siebel CRM integration with OIA is based on an embedded-interview approach providing a flexible and easily integrated solution.

This integration enables outcome driven interviews and business rules as defined in OIA Interviews and Rulebase. These rules can be tied to Siebel CRM business processes and data. This new integration framework offers easy configuration and integration using the "Div based layout". A simplified integration from Siebel CRM will result in lower cost of integration and easier upgrades to future OIA versions.

Industry specific use cases involving the need for step-by-step data capture to derive decisions or outcomes can be designed using the enhanced framework. The existing sample use cases, across two industries use the new embedded integration approach:

- Public Sector - Eligibility Assessment and Apply for Benefits
- Financial Services - Need Analysis and Application Capture

For a more detailed review of this simplified integration approach, please read here.

A more flexible and easily integrated solution for Oracle Intelligent Advisor. This integration reduces the cost of integration and simplifies future application updates.

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