

Siebel CRM Innovation Pack 2015



SIEBEL CRM

The most adaptable CRM solution available for On-Premise and 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.
- 21+ Industries with specific 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.

Enabling customers to maximize their investment in Oracle's Siebel CRM applications, new features, functions, and enhancements are provided with Siebel CRM Innovation Pack 2015.

Siebel CRM Innovation Pack 2015 delivers a new intuitive user experience for developers and improved business agility with the introduction of Siebel Composer. New industry specific mobile applications and portals expand product functionality for Public Sector, Financial Services, Consumer Goods, Life Sciences, Clinical and High Tech.

Innovation Pack Themes

The Siebel product focuses on three primary investment themes based on the feedback from our customers:

- **Customer Experience (CX).** Seamless customer experience across the CX portfolio (mobile, social, service etc).
- **Industry Innovation.** Feature rich solutions to over 20 industries, industry specific mobile applications.
- **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.
- **Cloud Ready.** With Siebel CRM you can confidently take your investment to the next level and host your application in the most suitable cloud deployment model for your enterprise. Siebel CRM integrates with Oracle Sales Cloud, Service Cloud, Marketing Cloud, Social Cloud and other ecosystem cloud products to create complete and memorable customer experiences. Oracle offers cloud hosting options for Siebel CRM today.

Customer Experience

Siebel Open UI

A new theme is introduced that simplifies the user experience to new levels. The new 'Synergy' theme, together with Open UI simplicity allows dynamic styling and branding to create a consistent user experience with other Oracle simplified UI applications.

SIEBEL OPEN UI

The Siebel Open UI framework also allows Siebel CRM to run on multiple mobile devices, including iOS, Android and Windows based tablets, and leverage native device capabilities such as location services, email, camera and signature capture.

- Fully responsive web design
- Fully Accessible compliant
- Based on industry standards

KEY BENEFITS

- Design once, deployment anywhere
- Developer friendly
- Intuitive, persona and role based UI design

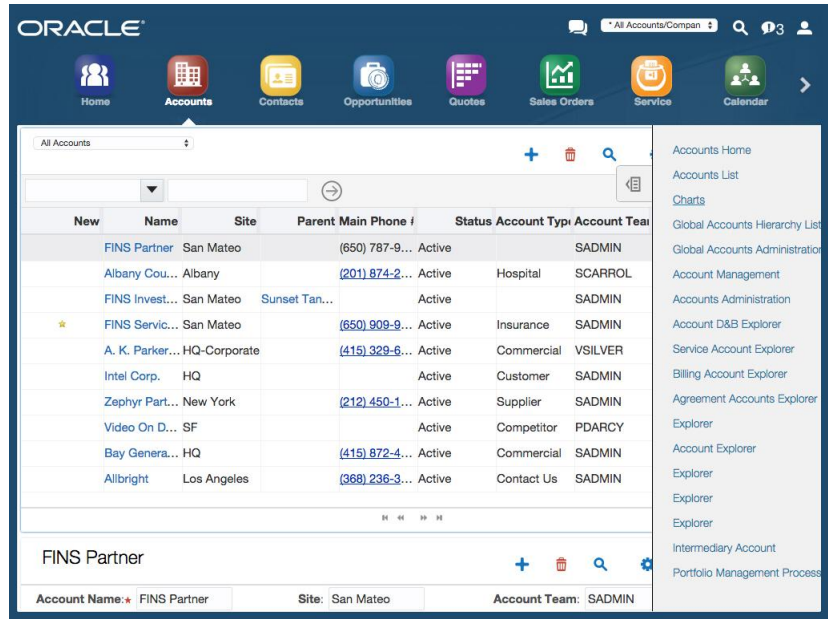


Figure 1. Accounts Detail View displayed with the new 'Synergy' UI theme.

jQuery Charts

An intuitive new charting framework is included this release:

- jQuery charts that can easily be customized in the browser with a modern UI appearance
- The charting framework is fully client side enabled and can be used on both connected and disconnected clients. Since it runs on the open client platform, no components need to be hosted to support it, lowering TCO and reducing platform dependencies.

Partner Relationship Manager Portal

A new Partner Relationship Manager portal has been introduced with Open UI. This will enable users to access the portal in any browser. Also included with this feature:

- The standard Partner Relationship Manager (PRM) Home page has been redesigned with banners and navigational links which can be configured.
- New artifacts such as Partner Finder, Sales Order, Partner Portal and Product Catalog are available and in addition new views from the horizontal portal have been redesigned for the High Tech Industry Manufacturing industry: Partner Programs, Info Center, Orders and Quotes.

Industry Innovations

Financial Services

- The Financial Services Mobile application now includes Rules Based Application Capture and Needs Analysis. Needs Analysis is built on integration to Oracle Policy Automation. In addition to the Contact 360 degree views, Application Capture screens follow the a guided walkthrough process – from Funding, Product Overview, Signature Capture to Approval.

INDUSTRY INNOVATION

New features include:

- Consumer Goods mobile
- Clinical Trials Management System
- eDetailing for Pharma mobile
- Financial Services mobile application capture
- Public Sector Partner portal

Consumer Goods

- A new Consumer Goods Mobile application is introduced to improve sales effectiveness for merchandising with a new Home page UI enabling drag and drop of Route Accounts to the Calendar and Van Sales and Inventory Cycle Counts functionality as well as GPS navigation functionality.
- The new mobile application will enable all existing Consumer Goods Handheld customers to convert to the new Siebel Mobile application. Customers can use the latest devices with complete Retail Execution functionality along with the additional native features offered by mobile devices.

Clinical

Siebel Clinical is enhanced in this release with Training Planning and Tracking and Risk Assessment added to the Clinical Trials Management System (CTMS).

Feature details for Site Training Planning and Tracking include:

- Defining training topics and training plans along with versions
- Publishing training plans to sites and site contacts based on rules
- Add/delete training plans and training topics at the site level
- Tracking completion of training topics for the site contacts
- Tracking training completion status at site, region and protocol levels
- Web Service to sync training data with external systems

Feature details for Risk Assessment include:

- Create Risk Assessment and Categorization Templates (RACT) for clinical programs, protocols, regions and sites
- Apply RACT templates at programs, protocols, regions and sites levels to calculate risk at each level

Public Sector

The Partner Portal for Public Sector has been enhanced to provide a world-class service portal for government partners with offerings that include the following:

- Streamlined user experience for service providers
- New UI renderer to align with responsive web application behavior
- The new UI includes a customizable News Carousel, Notifications, Navigational links and Site map

This enhanced service partner experience offers:

- Managing of referral orders more efficiently in a streamlined approach
- Reviewing service provider's assets and agreements.
- Managing provider profiles

Life Sciences

Mobile eDetailing functionality for connected and disconnected modes is enhanced in this release, enabling Sales with the ability to present digital content and obtain feedback in real-time with customers. eDetailing allows you to leverage the marketing capabilities of Siebel with the Pharma Sales mobile application to provide complete closed loop marketing. New enhancements include:

E-DETAILING

eDetailing functionality enhances the sales application, providing the ability to present customized digital content and obtain feedback in real-time with customers.

- eDetailing exposed as a separate view in the application to allow a sales rep to launch and then associate with a Contact
- Allow eDetailing to be launched from multiple entry points - Activity, Contact and Account
- Ability to associate or add a Contact during the presentation session at any time and record which plan items were attended and by which provider
- Ability to suspend the eDetailing session and add feedback at a later stage
- Ability to send a list of presented plan items to providers who attended the session via an email as part of content follow-up
- Ability to create a user specific play list, so when the messaging plan has too many plan items, that user can use the play list later
- Create an Activity automatically if Contact or Account eDetailing is launched

The screenshot shows an iPad interface for launching an eDetailing session. The top status bar indicates 'iPad', signal strength, and battery level at 99%. The app header shows 'Calls' and a search icon. The main content area is titled 'Call Planning: Advantage Pharmacy | Call'. A sidebar menu on the left includes 'Call Planning', 'Attendees', 'Promotional Items Dropped', 'Samples Dropped', 'Products Detailed', 'Validation Results', 'Literature', and 'Presentation Details' (which is highlighted). The main area displays 'Advantage Pharmacy' details: Name (Advantage Pharmacy), Status (Planned), Type (Account Call), Address (2358 Meadowbrook), Start Date (3/26/2015 05:31:00 PM), and Call Duration (30). Below this is a 'Presentation Details' section with a table of items.

Sequence #	Message	Messaging Plan	Duration (Sec)	End Time	Response
1	Hepatitis C Vi...	Zonal Verticals	35	3/26/2015 05...	Need Data
2	Zonal Specifi...	Zonal Verticals	1	3/26/2015 05...	Need Data
3	Zonall Patient...	Zonal Verticals	3	3/26/2015 05...	Continue Disc...
4	Zonall_Launch	Zonal Verticals	5	3/26/2015 05...	Continue Disc...

Figure 2. Launch an eDetailing session directly from the Account screen

Business Agility

Simplified Versioning Notation

Introduced with this Innovation Pack and moving from the four- to five-part version naming system to a simple two-part naming system.

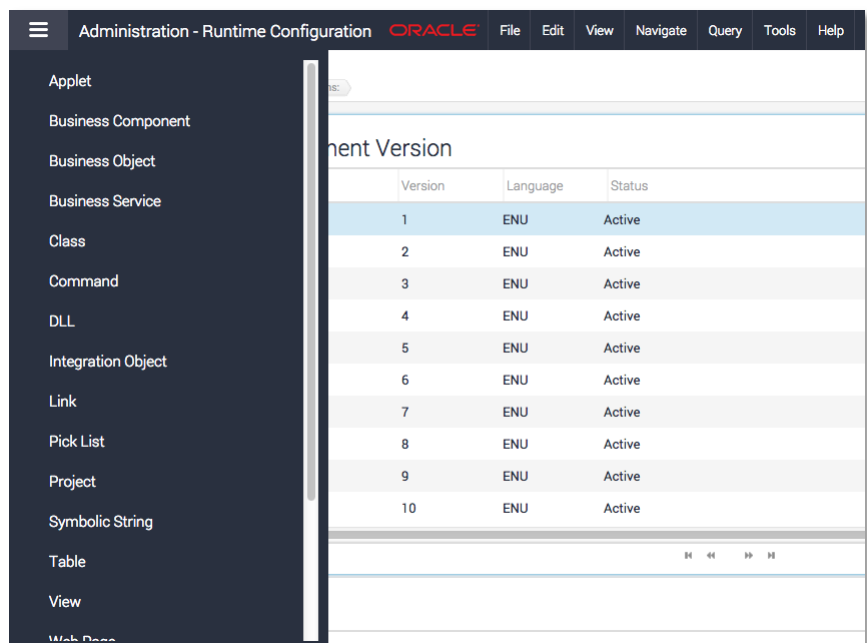
- This will eliminate the difference between the 8.1.1 and 8.2.2 code lines, there will no longer be a “8.1.1.15” and “8.2.2.15” release but rather a single “15.0” release, which corresponds to the current year, 2015.
- This will make it easier for customers to differentiate between releases when reporting bugs, patch requests, or even simply talking about their implementation.
- This release, Innovation Pack 2015, is quite simply referred to as 15.0. Future patch sets e.g. Patch Set 1, will be referred to as 15.1

Siebel Composer

With this release a *developer preview* of Siebel Composer is provided. This exciting new

product is a graphical web based set of tools that allow the implementation of your business requirements.

- The goal is to eradicate both the web templates and SRF. These will be meta-data driven and stored in the database. This is the first step towards our delivery of moving Siebel Tools to the Web and providing web based IDE for configuration changes, drag and drop web templates and allowing for a multi-user development environment using workspaces to allow parallel development across teams.
- In this release Siebel Composer is a relative exposure of Siebel Tools meta-data via list applets in an Open UI based application. This does not address usability or simplicity requirements for Siebel Composer that will be included in the final release. Siebel Composer does not support all the configuration capabilities that Siebel Tools provides
- Siebel Composer is provided as a *developer preview* only. Siebel Tools continues to be available and is the recommended solution for all production environments.



The screenshot shows the 'Administration - Runtime Configuration' window with the 'Component Version' table selected. The table lists 10 versions, all with 'ENU' language and 'Active' status.

	Version	Language	Status
	1	ENU	Active
	2	ENU	Active
	3	ENU	Active
	4	ENU	Active
	5	ENU	Active
	6	ENU	Active
	7	ENU	Active
	8	ENU	Active
	9	ENU	Active
	10	ENU	Active

Figure 3. Runtime Configuration with Siebel Composer

REDUCE TCO

Reduced total cost of operation when installing Siebel Innovation Packs

- Upgrade paths to support directly upgrading to IP2015 (from existing Siebel versions)
- Ability to upgrade from IP2014 to IP2015
- Web template migration utility for Siebel Composer

Upgrade

Improvements are added making it is easier to install and patch Siebel software to uptake new innovations.

- Enhancements to Upgrade and the Incremental Repository Merge process in this release include Upgrade paths to support directly upgrading to Innovation Pack 2015 (from existing Siebel versions) including the ability to upgrade from Innovation Pack 2014 to Innovation Pack 2015.
- Also added is help content in the Database Server Configuration wizard screens to help customers understand the purpose of each screen.
- It is now possible to leverage the Upgrade Ancestor property during the Incremental Repository Merge (IRM) execution. During the repository merge, the descendant is upgraded in the same way as the upgrade ancestor.

- In order to support the new web-based 'Siebel Composer', available in this release as a Developer Preview, a web template migration utility is included to migrate the data in web template files into the Siebel metadata tables.
- Key enhancements have also been made in this release to simplify deployment, these include: LDAP Client installation as an integrated part of the Siebel Installer. For security, TLS and SHA2 and SHA3 support have also been added throughout the application.

Marketing List Import

Enhanced for the existing Contact Import functionality that allows Customers to import greater volumes of Contact records from external sources into Siebel Marketing in a significantly shorter amount of time using PL SQL. This ability to import the right Contacts into the database quickly to be used for Marketing Campaigns is essential to execute the campaigns quickly and efficiently. The new PL/SQL based contact import brings significant performance improvements in the Contact load process.

Data Quality Management

An integral process within any application, Master Data Management (MDM) and Data Governance provides not just Data Quality tools and process management, but seeks to deliver it on behalf of an entire application ecosystem across the integrated enterprise.

- Embedded EDQ Access in UCM (Oracle Customer Hub) includes increased Business Agility through a single Dedicated Screen(s) in UCM directly to EDQ and faster access & configuration of related Data Quality rules and processes by rendering EDQ views and functions directly from UCM.

Certifications

The following certification updates are included in this release:

- Microsoft Windows Server 2012 Server R2 for Siebel server components
- Microsoft SQL Server 2012 R2, IBM DB2 LUW v10.5, IBM DB2 for zOS v11 with DB2 Connect 10.5 as Database Server options
- Oracle Java 8 JRE support: Oracle JRE 1.8 can flexibly support Siebel Java Data Beans and support compiled java version 6,7 and 8 on the server.
- Oracle Java 8 is also supported for the Open UI Client for latest features and security



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Hardware and Software, Engineered to Work Together

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