

Siebel CRM Innovation Pack 2016



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.
- 21 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.

Enabling customers to maximize their investment in Oracle's Siebel CRM applications, new features, functions, and enhancements are provided with Siebel CRM Innovation Pack 2016.

Siebel CRM Innovation Pack 2016 delivers many new features to improve user experience and mobile productivity such as Simplified Search and Mobile Calendars. Developers gain from a new, more collaborative user experience with Workspaces for Tools and improved business agility with the introduction of Application Usage Pattern Capture as well as the continued development of Siebel Composer. New cross-industry Open UI portals and industry-specific enhancements expand product functionality particularly for Life Sciences and Clinical Trial Management.

Innovation Pack Themes

The Siebel CRM 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 for 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.** Siebel CRM On-Cloud is now available and you can confidently take your investment to the next level and host your application in the most suitable cloud deployment model for your enterprise. Oracle offers cloud hosting options for Siebel CRM today with the Oracle Cloud Platform and Oracle Managed Cloud Services.

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

Customer Experience

Migration from High & Standard Interactivity to Open UI

Because of the obvious benefits of the Open UI client platform's ability to meet a broad set of use requirements with a single technology stack offering low total cost of ownership (TCO), Oracle will provide only the Open UI client starting with Oracle's Siebel Innovation Pack 2016. The High Interactivity (HI), Standard Interactivity (SI), and Standard Interactivity+ (SI+) clients will no longer be supported.

Further information is available from the previously published [Statement of Direction IP2016 Client Platform Support](#) available on My Oracle Support (Article 2017902.1).

In conjunction with the de-support of HI/SI applications, many SI applications are being migrated to work with the Open UI client. The following applications are migrated in Siebel Innovation Pack 2016:

- Siebel eCustomer
- Siebel eMarketing
- Siebel eSales
- Siebel eService
- Siebel Public Sector eService

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

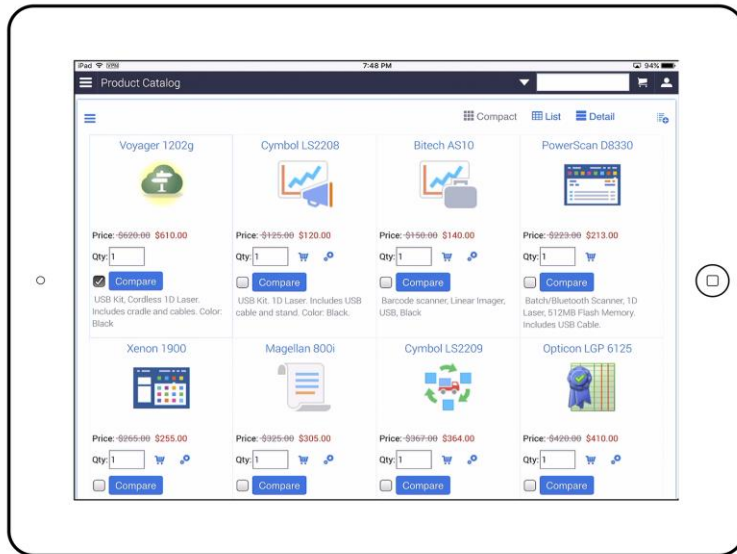


Figure 1. The new eSales Open UI application shown running on a tablet.

The following applications are not migrated in Siebel Innovation Pack 2016, and customers currently using these applications will need to continue to use Siebel Innovation Pack 2015 or earlier at this time¹.

¹ NOTE: Inclusion on this list does not necessarily mean that all functionality related to an application is unavailable in an Open UI client. For example, while the "Siebel eEvents Management" [application](#) has not yet been converted to Open UI, there are many events-related views that [have](#) been converted in support of the conversion of Siebel eMarketing. A customer who is using eEvents (in this example) could finish completing the migration internally and use the Siebel eEvents Management application with a relatively small amount of effort and move to Siebel Innovation Pack 2016.

OPEN UI EVERYWHERE

All Siebel CRM applications are now available and fully rendered with Siebel Open UI.

- Siebel Advisor
- Siebel Advisor for Customers
- Siebel Advisor for Partners
- Siebel Advisor Stand-Alone
- Siebel Customer Information File
- Siebel eApparel & Footwear
- Siebel eBanking
- Siebel eChannel for AF
- Siebel eChannel for CG
- Siebel eChannel for CME
- Siebel eConsumer
- Siebel eConsumer for CME
- Siebel eEvents Management
- Siebel eMail Response
- Siebel eRetail
- Siebel ERM
- Siebel ERM Administration
- Siebel eSales for CME
- Siebel eTraining
- Siebel Financial eBrokerage
- Siebel Financial eChannel
- Siebel Financial eCustomer
- Siebel Financial eEnrollment
- Siebel Financial eService
- Siebel FINS eSales
- Siebel Loyalty eMember
- Siebel Loyalty Partner Portal

USER EXPERIENCE

New features include:

- Siebel Calendar synch (CalDAV)
- Simplified Search
- Elastic List Applets
- Attachment drag and drop

The following applications are not planned for migration directly to Open UI at any point in the future. These are applications where the key functionality is available in other products—for example, the functionality previously provided by the “Siebel Sales for CE” application is found in the new Open UI-enabled “Siebel Sales Enterprise Mobile” application.

- Siebel CG Sales Enterprise
- Siebel eConsumerPharma
- Siebel ePharma CE
- Siebel eProfessionalPharma
- Siebel ERM Embedded
- Siebel eSitesClinical
- Siebel Field Service CE
- Siebel HH LS Medical
- Siebel Homeland Security eService
- Siebel Mobile Connector
- Siebel PRM Wireless
- Siebel Sales Enterprise CE
- Siebel Sales for CE

- Siebel Sales Wireless
- Siebel Self Service Wireless
- Siebel Service for CE
- Siebel SIA Sales CE
- Siebel SWLS Pharma

NOTE: Many applications were migrated to Open UI in previous releases. Any application not specifically listed above was migrated in a previous Innovation Pack.

Expose Siebel Calendar as CalDAV Server

Users today rely on their smart phone to track their activities throughout the day, while the organization relies on customer interactions being captured in CRM to build a 360° view of their customers. CalDAV connectivity allows both the user and the organization to have what they need, providing integration between the Siebel Calendar and any CalDAV-compliant client, including native iOS and Android calendars.

Key enhancements in this release include:

- Expose a user's Siebel Calendar as an additional calendar in the native mobile device calendars or inside popular desktop applications, such as Microsoft Outlook or Lotus Notes².
- Allow a user to capture customer meetings in the device they use every day, without accessing Siebel CRM directly

SIEBEL MOBILE

Mobile solutions for Siebel CRM:

- Siebel Mobile 2.0 app for iOS and Android
- Siebel Remote using Oracle Database XE
- Siebel Field Service Mobile

Siebel Mobility Solutions

Siebel Mobile 2.0

Building on the Siebel Mobile 2.0 release and the related enhancements delivered in the Innovation Pack 2015 release, enhancements are planned for Siebel Mobile with a focus on reducing Cost of Ownership.

Key enhancements in this release include:

- A conversion tool for server-side eScripts to Siebel Mobile Offline Scripts
- SSO Support, Data download/upload Analytics, and Scheduled Data Extraction

The Siebel Mobile App for Android is also introduced with the same functional footprint as the iOS app.

Siebel Remote

The existing Siebel Remote solution migrated away from SQL Anywhere to Oracle Database XE as the local database. This shift is transparent to our customers. Oracle Database XE will be installed as part of the Mobile Web Client installation and process, while the Siebel Remote backend processes will seamlessly generate Oracle Database XE compliant artifacts to facilitate local-server synchronization on the new local database platform.

Siebel Field Service Mobile

² Desktop applications may require third-party plug-ins for CalDAV integration.

The Siebel Field Service Mobile application has a completely new, modern user experience with the introduction of an additional theme called 'Zante'. The application will continue to support both connected and disconnected mode.

This application for service technicians provides features to:

- View activities and plan for the day
- Check trunk and parts order
- View tasks associated with the Service Request
- Track parts, time, and expense
- Provide Service Report and Invoice generation
- Integrate electronic signature capture
- Optionally attach media (images / videos)

Simplified Search

The Search user interface has been simplified and enhanced with a focus on usability. Support for additional external search engines allows for greater flexibility in Siebel CRM's search functionality.

Key enhancements in this release include:

- Dockable Search Results Pane: Search results are available on a separate pane that can be docked on either side of the screen or can be free floating to maximize real estate.
- Single Field Search: Query all searchable fields through a single search field.
- Autocomplete Suggestions: As the user types, common suggestions are displayed that match the entered text.
- Plug & Play Search Engine Support: Redesigned Search framework to allow customers to build their own custom adapters to integrate with 3rd party search engine(s) of their choice

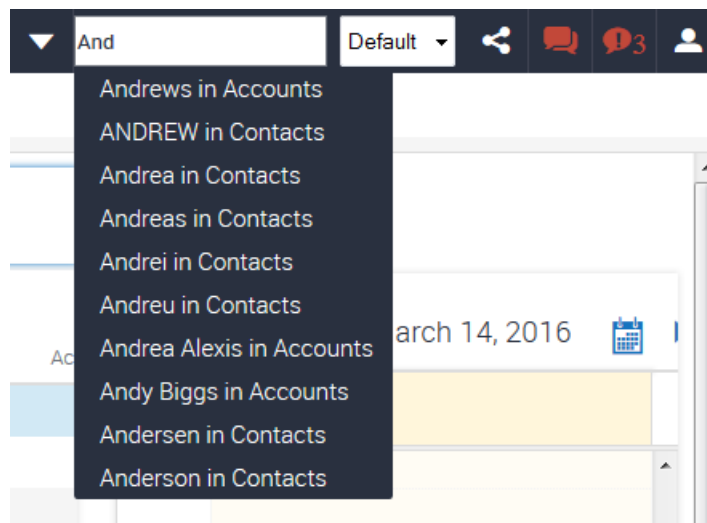


Figure 2. Auto Complete in the single Field Search, predicts what the user is trying to search for in the whole application.

Office 2016 Certification

The Siebel Document Server has been updated to provide support for integration with Office 2016 products.

Key enhancements in this release include:

- Correspondence generation (Microsoft Word)
- Proposal generation (Microsoft Word)
- Presentation generation (Microsoft PowerPoint)

De-Support of Oracle BI Publisher 10g Integration

- Extended Support for BI Publisher 10.1.3.4.x ended in July 2015. With Siebel Innovation Pack 2016, the support for Siebel - BI Publisher integration for reports generation has been withdrawn for BI Publisher 10g versions. Support for Siebel integration with BI Publisher 11g will continue.

Industry Innovations

Accelerated Decision Making via Enhanced Productivity

This Siebel Clinical Trials feature enables users to make faster decisions and introduces productivity improvements such as the reduction in the number of clicks required to complete a process and providing the ability to do tasks in bulk. This will help users accomplish their daily tasks more efficiently.

Key enhancements in this release include:

- Enable users to roll down activities, documents, and accounts from protocol and region to the underlying sites by a single click of a button.
- Enable users to generate payments from protocol and region for the underlying sites.
- Enable users to view the complete history of site primary account, contacts, and site status.

Subject Transfer

Clinical study subjects can move from one site to another due to various reasons, and a mechanism to enable and track this subject transfer between sites has been added to the existing Clinical Trials solution.

Key enhancements in this release include:

- Ability to transfer a subject to a different site under same protocol provided both these sites are using same active Subject Visit Template (SVT).
- Subject will be visible only in the site where it currently resides, i.e., either in the source or target site
- New view at each site level to show subject transfer history and transfer count.
- Site should get credit for subject status that happened at that site, even if the subject is no longer in that site.

- Each site is responsible for the data captured at that site and thus Source Data Verification will be happening at that site.
- Mechanism to track at which site the subject visit and activity occurred.
- Payment will be generated at the site where activity was completed irrespective of which site the subject is currently in.

Satellite Site

A Clinical Trial subject's visits and case book can exist in more than one location and multiple locations are associated to only one contracted Principal Investigator. Here, one site will be the parent site and all other locations are referred to as satellite sites. Satellite sites provide the same functionality and capability as a standard site and are contracted to a single Principal Investigator.

Key enhancements in this release include:

- All satellite sites are linked to the parent site and they share the same Principal Investigator and same active SVT version.
- A satellite site is just like any other site; Users can schedule a subject, make payment, and do site visit and source data verification in a satellite site just as at a normal site. It will have all the views that a normal site has.
- Users can transfer a subject from parent site to satellite site, transferring either all future visits or just a single subject visit without transferring the subject.

Enhancements Driven by Life Sciences Audit and Compliance

This feature ensures improved audit and compliance.

Key enhancements in this release include:

- Trip Reports will be locked for editing once approved, and users will have to version the report if there is a need to edit the trip report post-approval.

Messaging Plan Personalization and Call Planning

Support for personalized messaging plans improves efficiency and productivity of pharmaceutical sales reps.

Key enhancements in this release include:

- Enables administrators to make messaging plans ready for personalization
- Enables sales representatives to personalize messaging plans based on the audience and what is allowed by the head office
- Allows contact and account call planning views with scheduling applets which are completely Open UI-enabled.

Content follow-up for eDetailing

This feature provides improved productivity and the ability to reach medical practitioners remotely. This enables medical practitioners to access presentations / messaging at their own convenience.

Key enhancements in this release include:

- Ability for sales reps to send out a link to the health care provider for the follow-up contents
- Allows the health care provider to login to the portal and review the messaging plan contents
- Provides a 360-degree view when a health care provider logs in to the portal and reviews the messaging plan contents as it creates a call in the system

Business Agility

NPAPI Deprecation

The Netscape Plugin Application Programming Interface (NPAPI) has been used as a cross-platform plug-in architecture supported by many web browsers for many years. Due to security concerns, browser vendors have announced that they are phasing out NPAPI, with some vendors having already removed support in 2015. A number of Siebel CRM features rely on the availability of NPAPI.

Desktop Integration Siebel Agent (DISA)

Siebel Innovation Pack 2016 introduces a WebSocket-based framework known as the Desktop Integration Siebel Agent (DISA) in order to continue to support the specific features affected by NPAPI deprecation. The WebSocket protocol is currently well-supported in most major browsers. The framework will enable bi-directional, real-time communications between browsers (acting as WebSocket clients) and WebSocket Server, which will be implemented as a local application running at agent desktop.

Key enhancements in this release include:

- Email (F9) Integration with Microsoft Outlook—Ability to invoke external email clients from a Siebel Open UI
 - Populate email fields (To, CC, BCC) in external email clients
 - Use HTML templates to provide pre-defined, formatted email content
 - Send file attachments originating in Siebel
- CTI Hoteling feature in Siebel Open UI
 - Ability to retrieve client machine IP address in Siebel Open UI Client
 - Allow agents to log in to the Siebel CRM application from any teleset and computer and use voice communications features
- Inline attachment editing
 - Provides the capability for a user to open a file stored in the Siebel File System (e.g., such as an Account or Activity Attachments, Correspondence, or Proposals), make changes to the document using a location application (such as Microsoft Word), and then save and close the application with the new version automatically replacing the previous version on the Siebel File System.
- Batch Fulfillment Printing
 - Allows Fulfillment Center personnel to select a set of Correspondence Requests and send them to a printer

Microsoft Outlook Siebel Add-in

This small Microsoft Outlook Add-in enables agents to drag an email or email attachment from a Microsoft Outlook client and drop it onto a Siebel attachment applet, storing the file in the Siebel File System.

Siebel Application Usage Pattern Capture

This feature provides more tools for the IT department to track and analyze the usage patterns of their production systems. We recognize that every customer implementation of their CRM system is unique, so this feature leverages the Runtime Events module in Siebel CRM to provide a configurable interface to fine tune the granularity of usage pattern tracking to each customer's deployment needs and circumstances.

Usage Pattern tracking can be helpful in many ways. Knowing what a user was doing in the system when they encountered an error requires a certain type of pattern tracking while gathering statistics on the top ten most frequently-used views in the application requires a different type and granularity of tracking. Runtime Events provides the Siebel Administrator the flexibility to configure the types of actions to meet the need at hand.

Examples of patterns that can be tracked:

- Capture application state/fingerprints when an error occurs
- Monitor how end users are using a new configuration
- Analyze long-term view access data across all users to determine the footprint of the application that is actually used. This data can help narrow down the regression testing after an upgrade to be limited to those areas of the application that are being used.
- Analyze end-to-end lifecycle actions, such as time spent by users on a view, in an active session, etc.

Usage Pattern Tracking APIs are also exposed to the server and browser scripting interfaces to allow tracking patterns in customization as well.

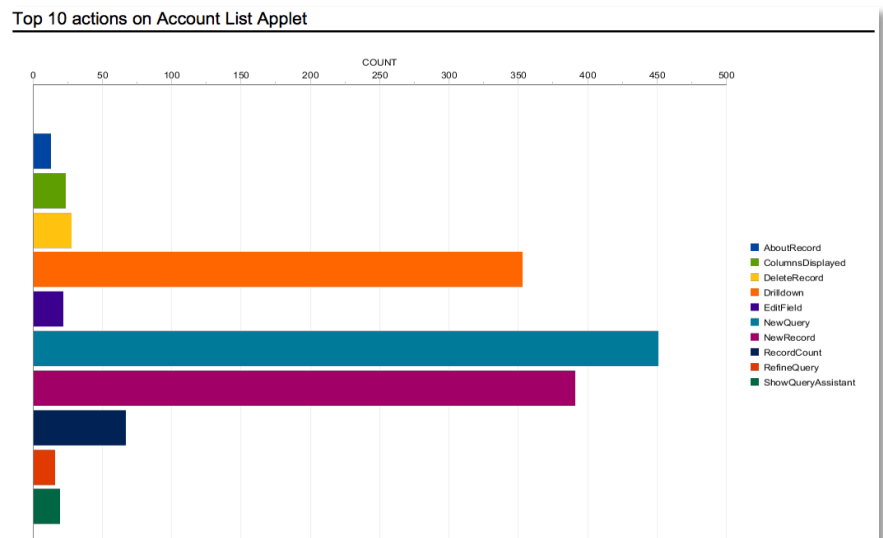


Figure 3. Example of analysis that can be created using the output from Application Usage Pattern Tracking.

Siebel Composer Developer Preview

Siebel Composer encompasses many features being added to the product to increase the agility with which enterprises can configure their Siebel CRM deployments. These features include:

- Zero Downtime for deployment of configuration changes
- Ease of configuration via a WYSIWYG (what-you-see-is-what-you-get) visual interface, which is eventually expected to completely replace Siebel Tools

In Siebel Innovation Pack 2015, the first Developer Preview of Siebel Composer was released. This demonstrated the capability to deploy configuration changes with zero downtime. This was implemented via two significant changes to the product that facilitated on-the-fly change and refresh of metadata objects:

- Movement of configuration metadata from a file-based store (SRF) to the Siebel CRM database
- Migration of Siebel Web Templates from flat files to the Siebel database

In Siebel Innovation Pack 2016, two new significant changes are provided to take the WYSIWYG configuration user experience forward:

- The first iteration of a new Web-based interface for Siebel Configuration — This feature focuses on providing a runtime, visual configuration capability of the User Interface (UI) Layout within the Siebel CRM applications. Configuration of layout could be within an Applet, View, or Application container. The goal is be able to define the layout of UI element without having to edit template files or requiring a deep knowledge of HTML. Configuration will be visual, utilizing capabilities such as drag and drop, resize, etc. The configuration capability will extend into defining UI layout by device form factor (for example, desktop, laptop, tablet, and smartphone) there by provide Responsive Web Design capabilities at design time.
- Workspaces — Workspaces will enable enterprises to manage the development and deployment lifecycle of the Siebel CRM metadata, allowing them to configure and deploy metadata changes to their application in real-time with zero downtime to end users.
 - Multi-user development model for Siebel CRM metadata, with support for collaborative and parallel development — Changes are maintained on a user-by-user basis, ensuring that users can make simultaneous configuration changes to the application even if they are modifying the same set of metadata objects.
 - Sandbox — a sandbox is available for editing and previewing metadata changes until they are ready for delivery or deployment into production.
 - Isolation of metadata changes — Changes to metadata are isolated from the currently deployed application in use by end users.

Some of the key capabilities and benefits of Workspaces delivered in Innovation Pack 2016 include:

- Multi-user, parallel, and collaborative development of Siebel CRM metadata
- Ability to preview metadata changes in real-time
- Support for flattening and rollback of runtime repository versions.
- Segmentation of repository, such as by device and user types
- Seed data managed and deployed via Workspaces

Standards-Based REST Interface Provisioned Fully within Siebel CRM

A new RESTful Web API is being delivered for Siebel CRM. Salient features include:

- Choice between JSON and XML formats
- Business Component CRUD and Business Service invocations supported
- Repository Metadata CRUD supported
- Exposure of data via simple flagging (check box) on the concerned BO / BC / BC Field as opposed to the need to explicitly create Integration Objects and Components.
- Conformance to the Oracle REST schema standard, which in turn is an extension of the hypermedia schema standard - <http://json-schema.org/draft-04/hyper-schema#>
- Catalog of all Objects exposed via the REST API

Siebel CRM Interoperability with Oracle Integration Cloud Services (ICS)

Oracle ICS is a Cloud-based integration platform that can source and learn integration metadata (standard REST and SOAP as well as custom formats from Oracle Applications) from multiple systems, and then facilitate the configuration of integration flows and bindings between those systems.

Siebel CRM is being equipped with the necessary features for integration flows involving Siebel CRM to be configurable with ICS.

For SOAP Web Services, the following new features are delivered in this release:

- Availability of a complete catalog of all SOAP-based Web Services exposed by a Siebel CRM deployment via a Siebel URL
- Availability of the WSDL for any given Web Service via a Siebel URL

Unified Cache Manager

This feature will provide the ability to store, retrieve, update, and delete data consumable by Siebel CRM interfaces and applications in a cache based on Oracle Coherence. Oracle Coherence is the industry-leading in-memory data grid solution that enables organizations to predictably scale mission-critical applications by providing fast access to frequently used data.

As data volumes and customer expectations increase, driven by the “internet of things”—social, mobile, cloud and always-connected devices—so does the need to handle more data in real-time, offload over-burdened shared data services, and provide availability guarantees.

While Siebel has always had caching capabilities, the cache is typically in individual Application Object Manager processes and cannot be shared or centralized. This new feature centralizes application data cache on the machine running the Siebel Gateway and supports fault tolerance and persistence to meet high availability scenarios.

Key Points:

- Scalable: Add more cache nodes if needed by a customer.
- Clustered/Fault tolerant: If one node goes down, another node can take up the load.
- Persistence: Cached data is not lost during server downtimes.
- Graceful degradation to in-process caching if centralized cache is not available.

- Extensible: Cache data can be accessed, added to, or deleted from available APIs in the server-side scripting interface.

Replacement of NetCharts with jqPlot

Visual Mining NetCharts is replaced with jqPlot charts for the display of charts within the Siebel User Interface. jqPlot is a jQuery plugin that generates pure client-side JavaScript charts, thereby eliminating the need for additional component installation.

Key Points:

- Secure: Visual Mining NetCharts were supported on older releases of Windows Server and Tomcat. With jqPlot, the Siebel security realm will control the charts security as well.
- Reduced Setup Effort: No additional components need to be installed and integrated.



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Hardware and Software, Engineered to Work Together

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