SIEBEL
CUSTOMER RELATIONSHIP MANAGEMENT

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Oracle's Siebel CRM
Statement of Direction
Open UI

ORACLE

Disclaimer

Purpose

This document provides an overview of features and enhancements included in Open UI as part of Oracle's Siebel CRM product roadmap as well as controls and functionality that are not being delivered as part of Open UI. It is intended solely to help you plan your roadmap for Open UI.

Siebel Open UI – A standards-based approach

Oracle only supports modern HTML5 browsers, such as Chrome, Internet Explorer 10 and 11, Firefox, and Safari, via the new web-standards-based Open UI, Oracle encourages you to plan on migrating to the modern Siebel Open UI client, which can also be supported on a broad variety of desktop browsers and mobile devices.

Siebel Open UI is completely HTML5 compliant and will work only on the latest browser versions that meet HTML5 standards.

Siebel Open UI – Features delivered through Innovation Pack (IP) 2013 (8.1.1.11/8.2.2.4)

The *Open UI Deployment Guide* published on My Oracle Support (Article ID:1499842.1), provides a complete list of controls and functionality available as of IP-2013, which was released in October 2013.

Siebel Open UI – Features targeted for IP-2014

The following table provides a list of features that will be available as part of the IP-2014 release.

Feature	Product Feature Detail	Product Modules impacted	Comments:
Calendar Alarms	Used to warn a user that an appointment start time is approaching.	Calendar	
Applet Location Editor	Applet Location Editor and Applet show/Hide personalization	All	
Attachments	Ability to save directly to File System	All	
Barcode Scanning Support		All	This is provided in HI through the Barcode Toolbar. In Open UI, the barcode query capability will be integrated with the Global Search and the New/ Update capability will be provide on the relevant View

Feature	Product Feature Detail	Product Modules impacted	Comments:
Drag and Drop Feature (Various)	This feature provides the ability to drag and drop items from an applet on the Siebel Calendar. For example a Life Sciences user could drag a contact record from a list applet onto the Siebel Calendar in order to create a contact visit record.	All	
Gantt Chart/Resource Scheduler	Consumer Goods Promotions, , eAuto Dashboard	All	
Hierarchy View, Account and Contact, org chart,	Provides hierarchical view of accounts, Contacts	All	
List View / List Applet	Lock/freeze on list columns	All	
IHelp	Unstructured help	All	
Correspondence editing from Open UI	Used to create correspondence without locally saving	All	
Embedded IFrame History tracking	Used by OBIEE, other iframe integrations	All	
Expression/Rules Designer	Design Time: Personalization business rules designer.	All	
Signature Capture	Signature Captures	All.	Customers no longer need the Signature Capture (CIC) control and will not be supported from IP-2014.
Global Account Hierarchy View	Available in Accounts screen	All	
Salutations Applet	Available on Home Pages	All	
Quote & Order Home Pages	Quote & Order Home Pages	Partner Portal	

Feature	Product Feature Detail	Product Modules impacted	Comments:
Organizational Analysis View	Organizational Analysis view is used in Accounts, Contacts, Opportunities, Enterprise Selling Process, Target Account selling and Portfolio Management Process	Sales	
Funnel Chart	Sales Pipeline Analysis Charts	Sales	
Marketing Program Designer	Design Marketing Programs and Multi-stage campaigns	Marketing	This will complete availability of the entire Siebel Marketing Campaign Management functionality on Open UI in IP2014. The new Open UI control will deliver better user experience and a fresh new look at designing a Campaign Designer.
Loyalty Promotion Designer	Design Loyalty Promotions	Loyalty	Siebel Loyalty Promotion Designer will have a new Open UI Control. This view was already enabled on Open UI (in version 8.1.1.11) and we have an improved user interface with the new control in IP2014.
SmartScript Designer	Ability to design SmartScript, Smart Script Path Flow Chart Admin View	Contact Center	
Order to Cash	Siebel AIA Order to Cash features with Oracle Configurator	Customer Order Management	
Product Configurator Administration	Administration, Product/Definition	Customer Order Management	
Product Configurator Runtime	Fully Open UI Compliant Runtime UI for Configurator	Customer Order Management	
Email Invoice	Ability to email an invoice from the Invoice Screen in the Siebel Mobile for Service Application.	Siebel Service Mobile	To be delivered in IP2014

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Feature	Product Feature Detail	Product Modules impacted	Comments:
Print Invoice	Ability to Print an Invoice from the Invoice screen in the Siebel Mobile for Service application	Siebel Service Mobile	
SmartAnswer for Service	Search using SmartAnswer. Respond to emails using SmartAnswer	Service	
Siebel Scheduler Constraints Administration View	Administration view to setup constraints for Siebel Scheduler	Siebel Schedule r	

Siebel Open UI – Features targeted to future release

The following table provides a list of features that are currently targeted to a future release.

Feature	Product Feature Detail	Product Modules impacted	Direction for Feature
Notifications for Universal Inbox	Integrated as part of notifications	Call center	Targeted to IP2015.
Self Service and Solutions screen (SI)	Self Service and Solutions screen	Partner Portal	As a workaround, complete one of the following: • Configure and use Service Request views, • Convert the SI views to Open UI
Real Time Shopping Cart (SI)	Real Time Shopping Cart	Partner Portal	As a workaround, complete one of the following: • Convert the SI views to Open UI • Use Orders screen to create orders

Siebel Open UI – Features not available

The following table provides a list of features that will NOT be made available as part of the Open UI functionality.

Feature	Product Feature Detail	Product Modules impacted	Direction for Feature
Parametric Product Search (SI)	Parametric Product Search	All	
TAS Coach	TAS Coach	Sales	
Asset Dispatch Board	Asset Dispatch Board	Service	
Product Promotion Schedule administrator's view	Administration - Product -> Product Promotion Schedule	Gantt Chart view	Use Administration -Product -> Promotion view.
Advisor/eAdvisor	Customer decisioning interactive dialogue	Customer Order Management	Use Need Analysis for Commerce solution. The Need Analysis for Commerce solution will offer similar or greater capabilities than Siebel Advisor for Employees, including the use of OPA's natural language rules modeling and interview automation.
Helpdesk Online	HelpDesk Online application is a SI application	Service	Convert the SI views to Open UI

Siebel CRM Support Timelines

The current Siebel CRM support timelines and go-forward strategy are described in the following table:

Siebel Release	Premier Support	Extended Support	Sustaining Support	Go Forward Strategy
6.x	Jun '05	Dec '07	Indefinite	Maintain
7.5.x	Dec '08	Dec '10	Dec '12	EOL
7.7.x	Sep '09	Sep '12	Indefinite	Maintain
7.8.x	May '10	May '13	Indefinite	Maintain
8.0.x	Jan '12	Jan '15	Indefinite	Maintain
8.1.x	Nov '16	Nov '19	Indefinite	Yearly Innovation
8.2.x	Nov '16	Nov '19	Indefinite	Yearly Innovation

For more information regarding support for Siebel CRM version 8.1 and 8.2, see *Lifetime Support Policy for Oracle Applications* on *My Oracle Support*.

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