Oracle's Siebel CRM Statement of Direction

Disclaimer

The following is intended to outline our general product direction. It is intended for information purposes only and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle.

Table of Contents

Purpose

This document provides an overview of features and enhancements included in Oracle's Siebel CRM Innovation Pack 2016 (16.0) release. It is intended solely to help you assess the business benefits of upgrading to the 16.0 release and planning for the implementation and upgrade of the product features described.

Oracle's Siebel CRM CX Strategy

Customers want personal and engaging experiences that develop into relationships. Much like the trials and rewards of personal relationships, when done right, brand relationships can grow into lifetime commitments. When done wrong, they can lead to painful breakups.

Oracle's customer experience solutions help companies and organizations transform their existing operational systems and infrastructure into a differentiated customer experience across the customer lifecycle. Built around Oracle's best-in-class solutions, Oracle delivers the most complete customer experience solution in the industry, enabling companies to differentiate themselves across all channels, touchpoints, and interactions.

Oracle's CX Portfolio Extends Siebel CRM to Deliver Complete CX

Oracle's additions to the CX Portfolio are complementary to Siebel CRM; they augment Siebel CRM with best-of-breed capabilities across all touch points of the customer lifecycle. Siebel CRM is a key component of Oracle's CX product portfolio--with a rich product roadmap focused on Customer Experience, Industry Innovation, and Business Agility, Siebel CRM can be your starting point for CX.

Oracle's CRM Solutions

Oracle offers the broadest and deepest portfolio of CRM solutions that address all customer touch-points and provide rich functionality to support the specific business needs that allow organizations of every size to deliver a superior customer experience.

Only Oracle provides complete CRM:

- » **Innovation -** Industry-recognized leader in CRM
- » **Industry** - More than 20 industry-tailored solutions
- » **Insight** - Embedded real-time business intelligence
- » **Integration** - End-to-end business processes
- » **Infrastructure** - Broadest choice of deployment options

This document highlights some of the key future product capabilities planned for Siebel CRM. This document will be updated periodically to include new features as they are planned.

Oracle's Commitment to Siebel CRM Innovation

"Applications Unlimited" is Oracle's plan to continue enhancing our current application product lines, including Oracle Siebel CRM.

Furthermore, Oracle is committed to investing in continual innovation for Oracle Siebel CRM. Oracle will provide incremental enhancements to Siebel CRM through a series of Siebel CRM Innovation Packs. These Innovation Packs will include functional and product module additions, as well as feature enhancements based on customer feedback.

An underlying benefit of the Oracle Siebel CRM Innovation Packs is that customers on the most recent versions of Oracle Siebel CRM do not need to upgrade to a new major release in order to benefit from added features and functionality. Customers that have upgraded to Oracle Siebel 8.1.1 or Oracle Siebel 8.2.2 (or point releases thereof), can leverage the Oracle Siebel CRM Innovation Packs. More details on these proposed innovations are included in this Statement of Direction.

Siebel CRM Support Timelines for Releases in Premier Support

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

SIEBEL CRM SUPPORT MATRIX

SIEBEL RELEASE	PREMIER SUPPORT	EXTENDED SUPPORT	SUSTAINING SUPPORT	GO FORWARD STRATEGY
8.1.x	Nov 2019	Nov 2022	Indefinite	Incremental Innovation
8.2.x	Nov 2019	Nov 2022	Indefinite	Incremental Innovation

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

Innovation Pack Themes

The Innovation Pack 2016 is built around core themes that provide a cohesive product experience. The primary themes are described below:

Business Agility

Agile – The Siebel CRM application is now easier than ever to maintain and update. This continued focus enables enterprises to adapt to business challenges quicker than ever and our goal is to continue to reduce application downtime, providing the ability to make changes to the application in real-time. For end users Siebel CRM requires only a browser and credentials. No matter where Siebel is hosted it is secure on any browser, device on the internet or intranet.

Open UI – The Siebel CRM Open UI framework provides the flexibility to design and deploy the application to be specific to your business and customer needs. The ability to deploy the application across a broad variety of browsers and devices on an open and flexible technology stack saves money and reduces the total cost of ownership (TCO). All of these features are securely available over the public internet to end users.

Cloud Ready – Siebel CRM is complementary to Oracle Cloud applications. Siebel CRM allows your business to take a flexible approach to your cloud IT by catering to cloud requirements for a variety of stake holders and business requirements. Siebel CRM provides a variety of cloud capabilities:

> » Siebel CRM can be hosted in public, private or partner clouds for employee, partner and/or customer facing applications. Siebel CRM can also be hosted on premise. This allows for optimization of deployment preferences and protection of most valuable assets, customer data.
> » Siebel CRM on premise or hosted deployments can integrate with Oracle Cloud applications via a number of available integrations:
> » Siebel CRM interfaces can all be run securely over the internet for Open UI, Siebel Mobile, and Siebel EAI interfaces
> » Siebel CRM provides Sales, Service, Marketing, Loyalty, and MDM as an integrated source of truth in the cloud
> » For sophisticated customers and partners Siebel CRM now supports multitenant database support on the Oracle 12c database.

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 can integrate with Oracle Sales Cloud, Service Cloud, and other ecosystem cloud products to create complete and memorable customer experiences. Oracle offers cloud hosting options for Siebel CRM today. Other partners also support cloud-hosted options.

Customer Experience

Open UI – Our ongoing investment has evolved the UI across all channels with innovations such as the Contact Center and Open UI eService. Open UI maximizes productivity with a simple, clean user interface and an engaging user experience.

Mobile – Siebel Mobile enables your application to be used on any mobile device and to be accessible from anywhere. The application automatically recognizes and adjusts according to the device. Siebel CRM is enabled for the new generation of mobile usage.

Usability – Applications are enhanced for mobile usability and to take advantage of the new responsive Open UI framework. The updated UI design is being driven by mobile device and personas. This creates a better user experience for each employee and for mobile and tablet use.

Social – The pervasive nature of social media and customers' ongoing interactions across this channel illustrate the need for an updated and complete 360° view of your customers. Siebel CRM innovations with Master Data Management represent progressive steps to achieve that golden customer record for your organization.

Industry Innovation

Best of Breed – Siebel CRM's deep industry solutions continue to be extended to leverage the best-of-breed cloud services to the Siebel ecosystem, such as innovations in industry, mobile solutions, and Oracle's CX products. Siebel CRM continues to be the best and most complete, industry CRM solution available.

Open UI – The flexibility of Siebel Open UI allows applications to adopt new integrated cloud solutions easily and to leverage Oracle's CX portfolio.

Business Agility

Next Generation Installer

In Siebel Innovation Pack 2016, all Siebel CRM Installers will be upgraded to Oracle Universal Installer (OUI) 13.2 release in order to take advantage of OUI enhanced features.

Key enhancements in this release include:

» Integration with the latest release of Oracle Universal Installer to manage the Siebel CRM deployment life cycle end-to-end, including:
» XML-based centralized inventory
» Cloning of existing Oracle homes
» True silent capability
» More accurate disk space calculations
» Integrated prerequisite checking
» Cleaner uninstallation and upgrades.
» Reuse of common files across multiple Siebel Installers to reduce the size of the Siebel CRM software package.
» Consolidation of Siebel Installers for ease of use and increased efficiency

NPAPI Deprecation - Desktop Integration Siebel Agent (DISA)

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 completely removing support in 2015. A number of Siebel CRM features rely on the availability of NPAPI.

Siebel Innovation Pack 2016 will introduce 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 and IBM Lotus Notes
» Invoke external email clients with F9 on 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
» Read & write files in agent's local machines
» 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
» Outlook to Siebel Attachment Drag-and-Drop

- » Enable agents to drag an email from a Microsoft Outlook email client and drop it as a Siebel CRM file attachment
- » 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

Siebel Application Usage Pattern Capture

This feature provides more tools to 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.

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 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 for editing and previewing metadata changes until they are ready for delivery or deployment into production.
  - Isolation of metadata changes from the currently deployed application in use by end users.

Some of the key capabilities and benefits of Workspaces to be 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 to be 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.

Customer Experience

To deliver an unrivalled customer experience in Siebel CRM to meet the expectations of your business, many new features have been introduced.

High Interactivity / Standard Interactivity Desupport

As a result 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. Any remaining functionality and applications that have not previously been made available will be migrated to Open UI capable applications.

Further information is available from the previously published Statement of Direction IP2016 Client Platform Support available on My Oracle Support.

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 Notes[1]
- » Allow a user to capture customer meetings in the device they use every day, without accessing Siebel CRM directly

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 Cost of Ownership reduction.

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 will also be introduced with the same functional footprint as the iOS app.

Siebel Remote
The existing Siebel Remote solution will see a shift from SQL Anywhere to Oracle Database XE as the local database. The shift will be 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

---

[1] Desktop applications may require third-party plug-ins for CalDAV integration.

Oracle Database XE compliant artifacts to facilitate local-server synchronization on the new local database platform.

Disconnected Mobility for Sales

Disconnected Mobility for Sales enables sales reps to use the application in areas with limited or no network coverage

Key enhancements in this release include:

- » Access & maintain customer profiles: Create and update information for accounts & contacts, Add contacts and colleagues to accounts, View up-to-date customer profiles
- » Qualify leads and opportunities: Qualify and convert leads to opportunities, Promote opportunities through sales stages, Select products, Convert opportunities to quotes, Convert quotes to orders, Complete and track orders
- » Keep track of tasks & appointments
- » Create account and opportunity tasks
- » Assign and follow-up on tasks with colleagues
- » Setup appointments with colleagues and contacts

Simplified Search

The Search user interface will be both simplified and enhanced with a focus on usability. Support for additional external search engines will allow for greater flexibility in Siebel CRM's search functionality.

Key enhancements in this release include:

- » Dockable Search Results Pane: Search results will be 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 will be 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

Office 2013 Certification

The Siebel Document Server will be updated to provide support for integration with Office 2013 products.

Key enhancements in this release include:

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

Industry Innovation

Specific industry innovations are described below.

Mobile Promotion Enhancements

Mobile Service Providers have to offer innovative products and pricing to their customers to stay ahead of their competition. Mobile promotion enhancements will support improved aggregate pricing and de-bundling scenarios.

Key enhancements in this release include:

» Compatibility Rules using aggregates for bundled promotions
» Cardinality when components are de-bundled or added to a promotion
» Enhanced Penalty Calculations

In-Memory Promotion Upgrade UI

Communication service providers (CSPs) use bundle promotion to model convergent bundling that they offer to subscribers. They may bundle core services offered for a residential customer of phone, broadband along with TV services (entertain). Service providers that offer wireless service can also include them in bundles. New services like home security can also be included in bundles to increase the wallet share and average revenue.

Subscribers often upgrade or downgrade their services, so it is critical that promotion upgrades/downgrades are done fast even when a bundle promotion has many components associated to it. In-memory promotion migration streamlines the user interface and as the name suggests, does in-memory computations and thus assuring a better promotion upgrade performance.

Key enhancements in this release include:

» Improved response time while upgrading/downgrading bundled promotions
» Improved user experience while upgrading/downgrading bundled promotions
» Communication Service Provides can process increased number of bundled promotion upgrades/downgrades.

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.
- » 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 should 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. The Subject tracking and site visits should continue at the parent site level.

Key enhancements in this release include:

- » All satellite sites are linked to the parent site and they share the same Principal Investigator.
- » Each satellite sites will have their own accounts, contacts, and addresses.
- » Mechanism to track at which site the subject visit and activity occurred.
- » Subjects, site visits, and payments are tracked at the parent site only.

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.
- » Ability to audit Risk and Compliance Template (RACT) data and record actions and dates against each RACT questions and answers.
- » Enable Trip Report re-authentication view in SSO mode.

Product Offer Enhancements

Siebel CRM Product Offers enable Telecommunications Operators to create promotional offers that customers can accept with one click that can be used on the web or channels where there is limited user activity such as Mobile SMS and TV Portals. Enhancements to Product Offer functionality significantly improves end user experience and simplifies the offer to order process.

Key features in this release include:

- » New web service that enables users to execute multiple offers in a single click to generate an order/quote
- » Optional flag to not save the order/quote in Siebel CRM
- » Apply offer(s) to active shopping cart
- » Support for both new acquisition and change order scenarios

» Improved Response Action Framework (RAF) that supports editing bundle promotion components and validating assets before applying the offers

Siebel Public Sector eService integration with Oracle Policy Automation (OPA)

Enhanced customer experience with ease of reviewing, identifying and applying for relevant programs

Key enhancements in this release include:

» OPA Integration: Complete self-service experience from Screening to Application intake process using the integration with Oracle Policy Automation
» Support for preceding and write-back of information to-and-from OPA rule-base for screening and application completion
» Update screen questionnaire and application rule-base in OPA without any dependency on Siebel CRM
» Redesign Intake process to have a modern, fresh look-and-feel using the Siebel Open UI framework.

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.

Application capture with OPA integration

OPA integration enables relationship bankers to use the mobile application to recruit new customers and grow the wallet share for the bank

Key enhancements in this release include:

» Enabling the relationship banker to conduct needs-analysis and capture the application for financial products during the interview process using Financial Service Mobile
» Support for preceding and write-back of information to-and-from OPA rule-base for screening and application completion
» Update screening questionnaire and application rule-base in OPA without any dependency on Siebel CRM

Siebel CRM - OPA Integration Enhancements

Enhanced integration with OPA enables end users to make informed decisions, review applications after they are submitted, and print the application if required.

Key enhancements in this release include:

» Enhanced Siebel CRM integration with OPA for Financial Services mobile and Public Sector Self Service application providing additional features such as Decision Support and application save and print.

Self-Service Scheduling

Citizens will now be able to schedule and manage appointments online. This results in cost savings for government and non-government organizations.

Key enhancements in this release include:

» Providing a self-service scheduling capability that enables customers and citizens to book and manage appointments with the service provider.
» Leverages Siebel Scheduler as the underlying engine to manage technician / case worker calendars
» Support for Public Sector and other self-service applications

PDF / Excel Template Support for Siebel Business Intelligence Publisher Reports

New template support for Oracle Business Intelligence (BI) Publisher Reports provides more options and flexibility for creating, running, and saving reports.

Key enhancements in this release include:

» Ability to support PDF and Excel (XLS/XLSX) templates for reports used in the Siebel CRM and Oracle BI Publisher integration
» Report templates in PDF and Excel formats can be uploaded directly in to the Siebel CRM application.
» Leveraging existing PDF templates for Siebel Reports. This save times creating new report templates.

ORACLE®

Oracle Corporation, World Headquarters
500 Oracle Parkway
Redwood Shores, CA 94065, USA

Worldwide Inquiries
Phone: +1.650.506.7000
Fax: +1.650.506.7200

Hardware and Software, Engineered to Work Together

Oracle is committed to developing practices and products that help protect the environment