

Oracle's Siebel CRM Statement of Direction

Innovation Pack 2017

ORACLE STATEMENT OF DIRECTION | SEPTEMBER 2016



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Table of Contents

Purpose	5
Oracle's Siebel CRM Strategy	5
Oracle's CX Suite Extends Siebel CRM to Deliver Complete CX	6
Oracle's CRM Solutions	7
Oracle's Commitment to Siebel CRM Innovation	8
Siebel CRM Support Timelines for Releases in Premier Support	8
Innovation Pack Themes	9
Business Agility	9
Customer Experience	9
Industry Innovation	10
Business Agility	11
Siebel Composer	11
Elasticity and Dynamic registration of servers for Siebel CRM on Oracle Public Cloud (OPC)	11
Migration and Management tools to simplify transition from On Premise to OPC	12
OpenUI Test Automation	12
Customer Experience	13
Standards-Based REST Interface fully provisioned within Siebel CRM	13
DISA Extensibility	13
Support of Oracle BI Publisher 12g Integration	14
Industry Innovation	15



Product Configurator using Oracle Advanced Constraint Technology and Oracle

Coherence Cache 15

Certification for Oracle Realtime Scheduler v2.3 integration 15



Purpose

This document provides an overview of features and enhancements included in Oracle's Siebel CRM Innovation Pack 2017 (17.0) release. It is intended solely to help you assess the business benefits of upgrading to the 17.0 release and planning for the implementation and upgrade of the product features described.

Oracle's Siebel CRM Strategy

Siebel CRM is a key component of Oracle's CX product suite, with a rich product roadmap focused on Customer Experience, Industry Innovation, and Business Agility. Our goal is to ensure the Siebel CRM application continues to be intuitive and extendable across all devices, to deliver evolving modern solutions that cater for all our 21 industry applications, and through business agility, to simplify application development, deployment, agile patching and automated testing. We also offer our customers the choice to deploy the application on premise or on cloud platforms.

It is vitally important that your strategic CRM system can meet the demands of modern customer experience (CX) and business process automation. Being able to deliver CX cross a variety of channels, as well as being a robust, integrated platform to back end processes, which will support the next generation of machine to machine interactions that will begin to drive process automation.

CRM is moving towards an era of process automation, where intelligent devices and the 'Internet of Things' (IoT) will begin to automate processes that already exist with your Siebel CRM system. These processes, refined over many years, may also be integrated deep into other systems. Achieving process automation excellence will deliver CX gains; additionally, future developments in machine learning unified with process automation and predictive analytics will improve productivity, efficiency and offer new business insights.

Our broader strategy enables the Siebel CRM application platform to not only integrate with Oracle's CX applications, but to be a platform that can easily be leveraged for process automation and IoT, as well as machine learning and predictive analytics. All of which will deliver competitive advantages without the business disruption that is often the outcome when adopting new technologies or applications.



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

Customers now expect 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 delivers the most complete customer experience solution in the industry, enabling companies to differentiate themselves across all channels, touchpoints, and interactions. The Oracle CX Suite solutions are complementary to Siebel CRM; they augment Siebel CRM with best-of-breed capabilities across all touch points of the customer lifecycle.

A hybrid, integrated, augmentation strategy is the recommended approach for Siebel CRM customers looking to adopt Cloud solutions into their CX platform.



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 2020	Nov 2023	Indefinite	Incremental Innovation
8.2.x	Nov 2020	Nov 2023	Indefinite	Incremental Innovation

For more information regarding older releases and the support extension for Siebel CRM versions 8.1/8.2, see [Lifetime Support Policy for Oracle Applications](#) on [My Oracle Support](#).

Innovation Pack Themes

Siebel Innovation Pack 2017 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 the most valuable asset: 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 Suite.

Business Agility

Siebel Composer

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 the deployment of configuration changes
- » Visual, Guided, Web Based Integrated Developer Environment for the customization of Siebel CRM applications
- » Simplified Siebel Configuration Model that hides the complexity of underlying Siebel Repository
- » Role Based Configuration
 - UI Designer – Layout and styling
 - Business Analyst – Business entities and flows, user and integration interfaces
 - Developer – Integration logic for the server and browser side artifacts to complete the implementation
- » Ability to configure User Interface variations for given configuration artifacts across dimensions such as Form Factor, User Type etc. without having to create separate Applications for each
- » Pre-packaged (but also customizable) Application Design Modules consisting of UI Templates, Javascript and Styling that can be used in a 'Plug n Play' fashion.

Some of the key capabilities and benefits to be delivered in Innovation Pack 2017 include:

Multi-level branching for Workspaces:

This enhancement will enable Workspaces to support parallel, multi-release development. It will allow the creation of multiple “integration” branches or workspaces that can be used as delivery targets for integrating development changes across different releases or teams. Developers can create their private workspaces off of integration branches and deliver their changes into the corresponding integration branches.

Additionally, integration branches also get published and deployed into the Runtime Repository for optimal runtime performance of the application.

Multi-language and non-ENU support for Composer:

This enhancement will enable Siebel CRM applications in Composer mode to be deployed into multiple languages. Metadata for all the deployed languages can be centrally published into the Runtime Repository for runtime use in a global deployment catering to multiple languages.

Elasticity and Dynamic registration of servers for Siebel CRM on Oracle Public Cloud (OPC)

Innovation Pack 2017 will provide enhancements to the Siebel CRM infrastructure to transform applications into “cloud-ready” applications that can be effectively deployed on Oracle Public Cloud to maximize the benefits of cloud deployment.

Some of the key capabilities and benefits to be delivered include:

- » Web-based configuration and provisioning of a Siebel CRM deployment
- » Centralized, highly available, cluster-based, in-memory configuration store for managing all Siebel CRM configuration and administration information.
- » Managing application components as services, and dynamic registration of service instances with a highly-available service registry.
- » Elastic load-balancing with built-in service registration and service discovery of Siebel CRM application services.

Migration and Management tools to simplify transition from On Premise to OPC

Siebel Database Migration framework will be further enhanced to make the migration of customers from On Premise to Oracle Public cloud simpler, easier and faster. Some key capabilities include:

- » Support for initial full migration from Siebel On Premise to Oracle Public Cloud
- » Incremental migration from On Premise to OPC using Rest infrastructure
- » Support includes migration of configuration, file artifacts and database artifacts
- » Enhanced upgrade framework to make Siebel Cloud Ready.
- » Enhanced capabilities to support easier upgrade/migration from file based metadata store to database based metadata store for Siebel Composer

OpenUI Test Automation

Innovation Pack2017 will provide abilities to record user scenarios in the UI and play it back within the application at anytime. The playback will recreate the functional flow in same manner as users would interact with application, and detect any unintended regression behaviors. The recording of tests can be stored within the Siebel CRM application and used for validation when required. The results of running the tests also would be stored for analysis.

The primary goal of these features is to significantly lower the costs of application testing and maintenance. The complexity of programming UI automation, costs of maintaining tools, tests and skills are eliminated. Test Automation enables the business users to record automated scenarios and tests, for demo and training purposes or for regression testing before rolling out releases.

Following are the key features and abilities:

- » Record a user scenario, using a tool bar with Start, Pause, Resume, Stop and Annotate features
- » Store and organize the recorded scenarios in the Siebel CRM database
- » Playback the recorded scenarios in single or batch mode
- » Modify the recorded scenarios or Test Scripts, if and when required. Add verifications at different points in Test Scripts
- » Review and analyze the results of playback or test runs within Siebel CRM, or using OBIEE
- » An end to end Automation framework tool to setup server and client machines and to run tests in batch mode
- » An end to end Test Management repository for Test Scripts, Test Sets, Master suites, Test cycles and Test Results analysis

Customer Experience

The following features that pertain to customer experience introduced in this release are as follows.

Standards-Based REST Interface fully provisioned within Siebel CRM

The Siebel CRM RESTful Web API is being further enhanced in Innovation Pack 2017 to include:

- » Catalog of Siebel CRM REST services
- » Swagger based description of the REST API (Data, Repository, Services)
- » Siebel REST infrastructure for making outbound calls to external REST APIs
- » Ability to tailor Siebel REST response content e.g. limit fields or child links in response

DISA Extensibility

Desktop Integration Siebel Agent (DISA) is a WebSocket-based framework, designed to support the specific features affected by NPAPI deprecation. The WebSocket protocol is well supported in most major browsers being used today. The framework enables bi-directional, real-time communications between browsers (acting as WebSocket clients) and a WebSocket Server, which is implemented as a local application running at agent desktop. The DISA framework can be extended by customers to provide customized functionality (DISA 2.0.11 or higher). This will help customers to fulfill any desktop integration requirements by using DISA's ability to act as a bridge between the Siebel Open UI application running in a browser and local desktop files, resources, and programs. This can potentially increase user productivity and work efficiency. Here is the overall workflow of the DISA framework:

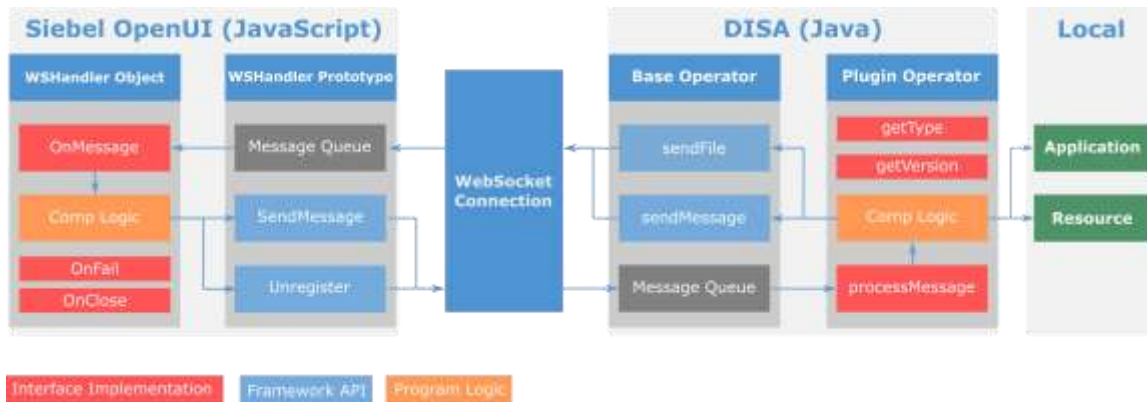


Figure 1: DISA framework workflow

To find out more about how to develop custom plug-ins based on DISA APIs and integrate them with the DISA framework, refer to: [DISA Development Guide and Sample Code](#)

For more information about Desktop Integration Siebel Agent, refer to: Install and Deploy Desktop Integration Siebel Agent (DISA) (Doc ID [2107511.1](#)).



Support of Oracle BI Publisher 12g Integration

Oracle Business Intelligence Publisher (BI Publisher) continues to be an extremely efficient and highly scalable enterprise reporting solution for Siebel CRM implementations. With Innovation Pack 2017, the support for Siebel CRM BI Publisher integration for reports generation will be added for the BI Publisher 12c version.

With this integration, customers can leverage investments in Oracle BI 12c infrastructure with Siebel CRM. The support for BI Publisher 11g integration will also continue.



Industry Innovation

Specific industry innovations introduced in this release are described below.

Product Configurator using Oracle Advanced Constraint Technology and Oracle Coherence Cache

The demands of our customers are the driving force behind our move to new technology solutions for two major areas of Siebel Product Configurator, Cache Management and Constraint Rules. Innovation Pack 2016 introduced a developer's preview of the module. Innovation Pack 2017 will bring this same feature to a production ready state.

Oracle Advanced Constraint Technology (ACT) is a library of algorithms found in the field of Constraint Programming. Constraint programming is a programming paradigm where relations between variables can be stated in the form of constraints. Constraints differ from the common primitives of other programming languages in that they do not specify a step or sequence of steps to execute but rather the properties of a solution to be found.

Innovation Pack 2017 will provide a like-for-like replacement of constraints found in previous versions of Siebel Product Configurator (e.g. Innovation 2015 and earlier). Using a new parameter, customers will be able to simply turn on the new ACT engine and have previously written constraints run through the ACT engine to find a valid solution.

Siebel Server Cache (e.g. Coherence) allows applications to share data by storing it in a central cache. Data shared in a central cache allows for a cumulative decrease in memory usage for the server as each Object Manager process will contain less cached data. Data will be cached once in Coherence and shared across the different Object Manager requests. Shared data is persisted, cluster-aware and fault tolerant. Siebel Server Cache will be used by the Siebel Product Configurator to communicate product model and messaging data to the new constraint engine.

In Innovation Pack 2017 a production ready release of the new engine and cache which serve up the Configurator business constraints will be introduced. Customers can then start to move their products and promotions to the new underlying technology.

Certification for Oracle Realtime Scheduler v2.3 integration

Siebel CRM has productized the integration with Oracle Realtime Scheduler (ORS). With ORS, it is possible to optimize a service technician's scheduling; being able to leverage features like street level routing, real time schedule optimization, etc. With this release, the integration will be certified with ORS version 2.3.



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Hardware and Software, Engineered to Work Together

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