

SIEBEL ADAPTER FOR ORACLE UNIVERSAL CONTENT MANAGEMENT

ORACLE UCM & SIEBEL CRM

BENEFITS

- **Increase employee effectiveness** by providing real-time access to customer-related documents that are always accurate and up-to-date
- **Strengthen customer service** and partner relationships by seamlessly delivering Siebel content via the Web
- **Reduce costs** related to shipping, printing, storage, education and training
- **Adhere to corporate regulations** by attaching retention policies to Siebel content
- **Increase ROI** by storing all content in a scalable and secure unified repository that supports multiple Siebel applications

In today's information-driven business environment, gaining competitive advantage starts with the ability to get the right information, to the right person, at the right time. Siebel CRM provides business users with a rich set of tools to access and share critical customer data in real-time, but the content that supports business operations — from sales proposals, to service contracts, to marketing briefs — can put business at risk if it's not accurate or up-to-date. Oracle Universal Content Management offers an out-of-the-box integration with Siebel CRM to provide comprehensive management of all content across Siebel CRM modules, reducing information silos and enabling quick Web-based access and ease of distribution, so your people have the right information to drive business— whenever, wherever they need it.

The Business Value of Content Driven CRM

Throughout the sales process — from first point of contact until closure — content drives business. “Unstructured” enterprise content such as Microsoft Office documents, PDFs and scanned documents, are integral to supporting the different stages of a sale. But all too often, this content lags behind the rapid pace of daily operations: Where is the most recent version of a document? Who last edited it? Was it approved by the right person? Inefficient content management costs time and money, while business moves on — at times to the advantage of your competition, or to the dissatisfaction of a customer.

The Siebel Adapter for Oracle Universal Content Management (Oracle UCM) offers a flexible, scalable and secure solution that allows employees, customers and partners to collaborate, contribute and access business content anywhere worldwide. The adapter integrates Oracle UCM with Siebel CRM, to replace its native files store and provide an enterprise-class content management infrastructure for centralizing the storage of all customer-related documents, and inserting documents into workflows to drive process efficiency.

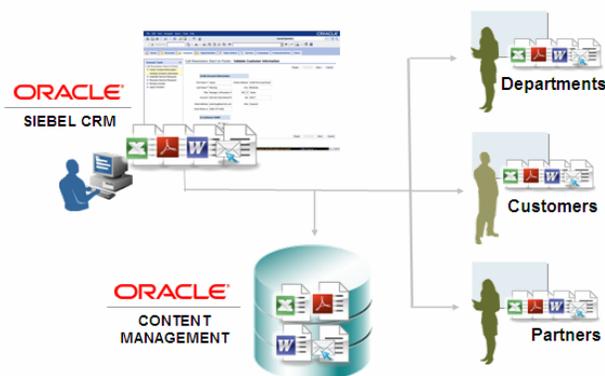


Fig. 1 | Content checked-in via Siebel CRM is centrally stored in Oracle UCM, extending access to a wide range of audiences via Siebel UIs, intranets or public websites

With a full array of content management functionality supported by Oracle UCM, including search, security, workflow, revision control, and content conversion capabilities, organizations can effectively and efficiently capture, share and distribute digital and originally paper-based documents and reports to Siebel CRM, public websites, intranets or other applications.

The Integrated Functionality of Oracle UCM and Siebel CRM

The Siebel Adapter for Oracle UCM provides direct access to personalized, relevant content and content management services through familiar Siebel screens. An item such as a sales contract can be checked in to Oracle UCM via Siebel CRM, at which time it's automatically converted to an accessible format such as PDF/HTML for online viewing and printing, and it's assigned a unique URL to make it easy to access and share via different application interfaces. For those organizations that wish to convert paper documents to digital format and expose them as Siebel attachments, the Siebel Adapter for Oracle UCM is integrated with Oracle Document Capture that can be leveraged to scan and index paper documents from both central and remote locations, and have the content stored and managed in Oracle UCM. In terms of security, Oracle UCM stored content adheres to the parameters of the Siebel system, using role-based permissions to ensure that content can be viewed or modified only by the intended parties.

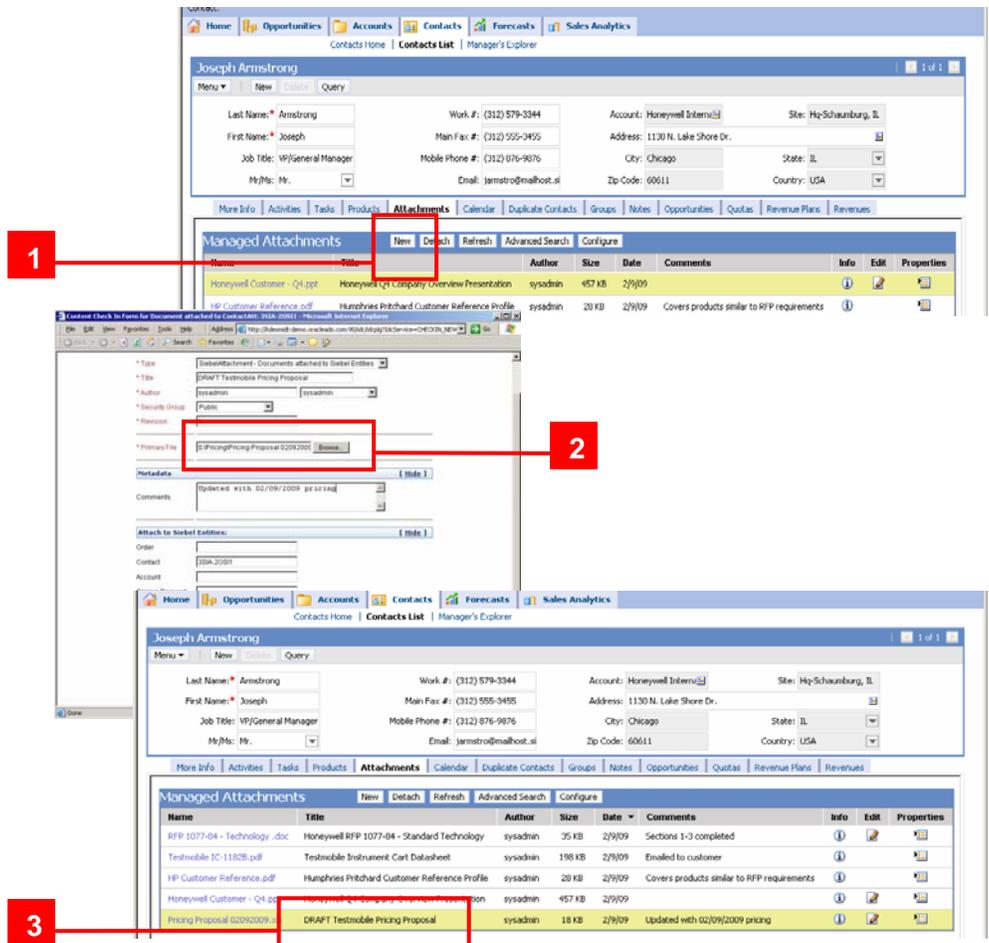


Fig. 2 | 1. 'New' attachment button in Siebel UI launches Oracle UCM dialog 2. Document is retrieved from desktop to be checked-in to Oracle UCM 3. Once checked-in, document appears in Siebel Attachments UI

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CERTIFICATIONS

- Oracle Universal Content Management 10gR3
- Oracle Siebel SIA / SEA 7.8.2, 8.0.0, 8.1.1

RELATED PRODUCTS

- Oracle Document Capture
- Oracle BPEL Process Manager
- Oracle Universal Records Management
- Oracle Secure Files
- Oracle Real-Time Decisions

When content needs to be modified, the native document can be checked out and locked to maintain its integrity, and then checked in as a new version once edits are completed with full revision tracking to maintain access to all previous versions of content items. Workflow manages the review and approval processes, including tracking comments and related revisions.

Advanced content searching functionality enables metadata that is attached to a document (such as customer name, or sales kit, or a campaign event) to allow the retrieval of all content that's being stored in Oracle UCM, whether that be a sales contract, a service agreement, a product spec sheet, a case history, or a high resolution image used for a marketing brochure.

Achieve High ROI Today— Meet the Information Management Needs of Tomorrow

The Siebel Adapter for Oracle UCM integration provides an enterprise-wide solution that scales to meet the requirements of multiple departments and is capable of storing millions of items, without sacrificing the integrity of existing application infrastructure or increasing IT expenses in order to do so.

The fusion of Oracle UCM and Siebel is achieved through a modular and completely self-contained architecture which ensures that ongoing maintenance and future system upgrades will not require high services costs, custom integration “updates”, or jeopardize the ability to upgrade one system without impacting the other. And by consolidating the overall architecture on a single platform and security model, “band-aid” integrations are eliminated, thereby minimizing application development and support costs.

Oracle UCM is the strategic platform for managing unstructured information in Oracle Fusion Applications and Oracle Applications Unlimited. Leveraging Oracle UCM as a middleware content management solution ensures your infrastructure is synchronized with the future of Oracle Applications. Additionally, the Oracle technology stack offers the flexibility to further enhance your applications. Utilizing Oracle Secure Files to achieve automated de-duplication of UCM-managed Siebel content or Oracle Real-Time Decisions to deliver relevant, real-time content to Siebel users to ensure new business and sales opportunities are identified and sized based on current data. All together, Oracle UCM plus Siebel means that organizations become proactive information-driven enterprises rather than reactive groups playing catch-up to the latest trends and opportunities.

For More Information

For more information on Oracle Universal Content Management, call +1.800.ORACLE1 to speak to an Oracle representative or visit: <http://www.oracle.com/goto/contentmanagement>

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