Oracle Service Cloud Integration with Oracle Siebel Service
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

Executive Overview .............................................................. 4  
Introduction ................................................................. 4  
Customer Choice .................................................................... 5  
Augmentation Best Practices .................................................. 6  
Integration Use Cases ............................................................ 7  
  Use Case #1 - Customer Portal Used with Siebel Agent Desktop .. 7  
  Use Case #2 – Augmenting Siebel with Oracle Service Chat ..... 10  
Integration Approaches .......................................................... 12  
  UI Layer Integrations .......................................................... 13  
  Data Layer Integrations ....................................................... 16  
Conclusion ............................................................................... 17
Executive Overview

Oracle's acquisition of RightNow (Oracle Service Cloud Service or Oracle Service Cloud) presents Oracle customers, including those with Siebel deployments, with a unique opportunity to leverage Oracle Service Cloud functionality with their existing Siebel Contact Center and Service functionality. As an industry leading cloud multi-channel service and support solution, Oracle Service Cloud complements the robust on premise functionality provided by Siebel Service. By leveraging both solutions in an integrated fashion, customers can drive improved customer acquisition, retention, and efficiencies.

Introduction

The concepts set forth in this document provide guidance for customers who plan to integrate Oracle Siebel Service/Contact Center and Oracle Service Cloud. Customers can incorporate the concepts and methodologies illustrated here as part of their own or partner-assisted efforts in an integration project.

This paper will discuss numerous integration approaches and several use cases that highlight the value of integrating Oracle Service Cloud Web Self Service (Customer Portal) with Siebel Contact Center to deliver a multichannel customer service experience. These solutions and use cases are based on two Oracle components:

- Oracle Service Cloud release 13.2 or later
- Oracle Siebel CRM release 8.1.1.9 or later

Oracle Siebel is Oracle’s strategic on premise CRM solution which provides deep functionality in the areas of sales, service, marketing and loyalty and order management. Oracle’s service solution (Oracle Service Cloud) is a cloud-based application which focuses on customer self service, multichannel functionality, knowledge management, and customer service agent productivity. These two solutions combined provide a comprehensive customer experience solution for multichannel web and contact center service management.

Integrations between highly customizable solutions such as Siebel and Oracle Service Cloud typically have a range of requirements based upon a company’s unique needs and business model. It is difficult to determine a one-size-fits-all solution for this type of integration. Instead of proposing a fixed scope solution, this document is intended to guide a customer through a spectrum of approaches for integrating Siebel as a Contact Center solution and Oracle Service Cloud as the Self Service, knowledge management, and agent productivity solution.

The Oracle Siebel and Oracle Service Cloud versions listed above were used for developing this document; however, this guide also has value to customers on earlier versions of both products. The approach taken generally uses long-standing APIs, services and/or standards available from both solutions.
Customer Choice

Oracle is fully committed to focused roadmap enhancements and lifetime support of the Oracle Siebel product line. Oracle will continue to deliver innovations for Siebel, focused on improving customer experience, enhancing Industry specific solutions, and increasing business agility. As stated by Steve Miranda, Executive Vice President Applications Development:

“Oracle Siebel CRM, with its industry-specific solutions, continues to be a strategic On-Premise platform. We have maintained innovation levels and investment in Siebel since the Oracle acquisition, and intend to continue to do so as stated in our Applications Unlimited commitment.”

For those customers that are looking to expand their existing Siebel deployment, Oracle provides the option to augment their solution with industry leading cloud functionality from Oracle Service Cloud. As part of this augmentation approach, customers can extend their existing Siebel Contact Center/Service deployments with the following cloud-based functionality from Oracle Service Cloud:

- Web and mobile customer self service
- Knowledge management
- Additional multi-channel functionality such as chat and co-browse
When considering an augmentation strategy, it is typically easiest to start with something small and add additional functionality as your requirements grow. This approach is based on the MVP (minimal viable product) standard. By starting with a small entry point, you can evolve your requirements based on user feedback and collaboration.

In the case of a Siebel augmentation with the Oracle Service solution, most customers look first at augmenting their self service needs with the Oracle Service Customer Portal. With the addition of the customer portal for self service management, inclusion of the Oracle Service Knowledge Management is extremely straightforward.

Once your organization and users are comfortable with the addition of the Customer Portal, additional functionality can be added in a phased approach based on your business needs such as Email Response Management, Multi-channel (Chat and email), and finally Call Center.

Siebel has a comprehensive email response management solution. For those customers that are running a pure Siebel environment, the Siebel ERMS solution can be used.
Integration Use Cases

In this section, we will explore a number of different use cases that utilize different integration methodologies. In each use case we will be addressing a different business problem. These use cases are intended to provide examples of what is possible, but the integration possibilities between Oracle Service Cloud and Siebel are not limited to what we have defined below.

Use Case #1 - Customer Portal Used with Siebel Agent Desktop.

In this use case, the company was looking for a self-service customer portal that could be deployed quickly and that would allow them to easily integrate with the Siebel Service Request management process.

**Business Challenge**

- They were struggling to find a customer portal solution that was easy to deploy and would provide a modern customer experience, which their customers have grown to expect.
- They were open to cloud solutions because they had limited availability of their IT staff to maintain the software and hardware in support of a portal.
- Many of their customers requested self-service access and were becoming impatient in waiting for them to put a solution in place. This began to affect Customer Satisfaction ratings.
- If possible, they needed to reduce the number of service calls they were receiving. In particular, they noticed there were often an excessive number of calls back and forth between the agent and customer to solve a request.

To address challenges like these, an augmentation with Oracle Service Cloud offers a distinct set of benefits.

**Business Value**

- Increase the value of your current Siebel investment by quickly implementing, with minimal upfront costs, a robust scalable solution that improves customer satisfaction and reduces your costs.
- Self-service provides call deflection cost savings of $32.74 vs. $1.17 per transaction.
- Provides an innovative expansion/augmentation strategy for existing Siebel customers.
- Hosted solution – scales quickly at reduced costs.
- Software value concentration – minimize implementation costs/time.
- Speed to delivery.
With Oracle Service Cloud Customer Portal, organizations can provide a self-service portal with a powerful knowledge base and best of breed features. This can be deployed with reduced implementation time and at a lower cost. Customers can quickly contact agents via chat, email, and click-to-call. They can view, update, and report new service requests in Siebel. Its open architecture allows straightforward integration with the existing Siebel CRM application. In this case and many others, Siebel CRM is considered the master and source of service request management for all service agents.

Oracle Service Cloud Customer Portal was a viable and attractive solution to meet this customer's requirements. Using an Open UI version of Siebel, a customer can now manage their SRs, attach supporting documentation and see updates as the agents work on each case.

The data replication is minimal between the two systems. Only the Contact Id was needed to be loaded into Oracle Service Cloud Customer Portal.

In this example, we will show how an existing Siebel Service deployment was augmented with the following functionality from:

- Oracle Service Cloud Customer Portal
  - Customer Self Service
  - Knowledge Management

Use Case #1 Process Flows

**Submit an Issue through the Portal; Create SR in Siebel Call Center**

A – Oracle Service Portal uses iFrame to call a html application (Jquery/Ajax) to call Siebel Web Services
Use Case #1 Screen Shot

In the following screen shot the customer has logged into the Oracle Service Customer Portal. Using web services from Siebel, the customer is able to submit a new Service Request as well as view their Service Request history. The customer is also able to access the knowledge management functionality provided by Oracle Service Cloud to try to resolve their issue themselves.

Figure 6: Oracle Service Customer Portal with Siebel SR Data Exposed through Web Services

Use Case #1 Conclusion

In this use case you have seen how the existing Siebel deployment was augmented with cloud self service and knowledge management functionality. All of this functionality is now available at the Customer’s fingertips through a single user interface. By combining all of this functionality through a single interface, this organization will be able to:

- Improve customer satisfaction with fast, consistent issue resolutions
- Reduce costs through customer call deflection
- Consolidate information from multiple channels into the Siebel system
Use Case #1 Considerations:

Integrating Oracle Service Customer Portal and Siebel Service Request Management using Siebel Open UI has many advantages:

- It is a user interface integration so it requires minimal data replication due to being a user interface integration.

- The learning curve to perform the integration is extremely short. On the Oracle Service Portal it is done via iFrame using the Oracle Service Administration tool. On the Siebel side it is done via SWE command with JQuery to hide unwanted applets. Here is an example of a swe command used to call the view in the previous screenshot:

  `http://<servername>/callcenter_enu/start.swe?SWEUserName=SADMIN&SWEPassword=SADMIN&SWECommand=ExecuteLogin&SWEApplet=GotoView&SWEView=IG+SR+ListView&IsPortlet=1&SWEPostnApplet=IG+Contact+SR+Applet&SWEPostnRowId=3SIA-2LXDN`

  It is recommended to use SSO and SSL to minimize any potential security issue.

Use Case #2 – Augmenting Siebel with Oracle Service Chat

In this use case you will see how an existing Siebel Call Center deployment can be augmented with chat and knowledge management functionality provided by Oracle Service. In this example, the Oracle Service Customer Portal and Agent Desktop will be utilized to provide support for the customer facing and agent facing aspects of the chat channel. The Siebel agent desktop is embedded within the Oracle Service desktop. Agents will be entering service request information directly into the Siebel system as an embedded interface, and Siebel will remain the master repository for service management data.

Many organizations today face the challenge of having multiple systems to track and manage customer requests across different channels. The result of this is that agents must perform manual tasks such as cutting and pasting information from one system to another in order to maintain visibility and access to all requests from a customer.

- **Business challenge**
  - Organizations struggle to augment existing systems with new functionality
  - Extension of existing systems and processes globally can be time consuming
  - Processes that require the use of multiple systems, or manual steps are difficult for agents, and can decrease productivity and dramatically increasing operational costs.

- **Business Objectives**
  - Provide a single front end to the Customer Service Agent
  - Standardize service process globally
  - Increase agent productivity and efficiency
• Establish a single business process to handle incoming requests regardless of the channel (web, email, call and chat).

• **Business value**
  - Improved Customer Service Agent efficiency and productivity without wasting time cutting/pasting and toggling between different applications
  - Reduced training requirements – resulting in lower costs and faster time –to-competency to new hires
  - Faster service and reliable customer view through a single source of customer interactions

In this use case a large organization would like to augment their existing Siebel Service deployment with knowledge management and multichannel support. To enhance both agent efficiency and customer experience, this organization would like to provide all of this functionality through a single application user interface.

In this example, we will show how an existing Siebel Service deployment was augmented with the following functionality from:

• **Oracle Service**
  - Customer Portal
  - Knowledge Management
  - Chat
  - Agent Desktop

---

**Use Case #1 Process Flows**

**Incident Created Through the Self Service Portal from a Chat Request**

Use Case #1 Screen Shot

In the following screen shot the Agent is working on the Oracle Service Cloud Agent Desktop. On the left, you will see an active chat request from a customer that was submitted through the
Oracle Service Customer Portal. The Siebel Agent Desktop is embedded directly in the screen. As the Agent enters data into the system, it will be entered directly into Siebel. Once the chat session has completed, the Agent will be able to view the chat transcript within the Siebel Service Request.

![Image ofSiebel integration](image)

**Figure 5:** The Siebel Service Request is directly embedded in Oracle Service using the OpenUI from Siebel.

**Use Case #1 Conclusion**

In this use case you have seen how the existing Siebel deployment was augmented with self service, knowledge management and multichannel functionality. All of this functionality is now available at the Agent’s fingertips through a single user interface. By combining all of this functionality through a single interface, this organization will be able to:

- Decrease agent training time
- Standardize processes across all call centers and all channels
- Decrease operational expenses

Improve customer satisfaction with fast, consistent issue resolutions

**Integration Approaches**

Application to application integration requirements vary from customer to customer, depending on functional and data requirements, business processes, industry, and/or business model.
Additionally, specific requirements around the directional flow of data and desired frequency of data updates dictate the methodology and technical requirements. All of these factors drive the integration requirements for your business.

There are multiple methods available for customers to integrate Siebel and Oracle Service Cloud. The path that you choose will be largely based on your requirements, and your preference for integration strategies.

This document outlines a number of different approaches for integration, as well as several use cases that utilize different integration approaches. Ideally, these different use cases and best practices provide guidelines and roadmap for your specific requirements.

**UI Layer Integrations**

**Option #1: Oracle Service Customer Portal with Siebel Call Center**

To augment your existing Siebel deployment with customer self service from Oracle Service, APIs can be used to expose Siebel Service Request information through the Customer Portal. In the following screen shot, the Oracle Service Customer portal is enabling customers to see their service history by making a call to Siebel. Additionally, new service incidents can be submitted through the portal. Again, APIs will be used to pass that information back to Siebel to create a Service Request.
Option #2: Call Service Cloud API from Siebel

If you want your agents to perform actions directly from the Siebel agent desktop, it is possible to use APIs to bring information such as knowledge articles from Oracle Service Cloud into Siebel. In the following screen shot, you can see the Siebel Agent Desktop with knowledge management information being pulled in from the Oracle Service Cloud. Through the use of APIs, agents can continue to use the user interface that they are familiar with, while leveraging the additional functionality such as knowledge management from the Oracle Service Cloud.

Figure 1: Oracle Service Knowledge exposed in Siebel using web services
[Note: It is also possible to utilize Oracle Knowledge Enterprise (InQuira) with Siebel. The Oracle Knowledge EE to Siebel Integration is available in Siebel 8.1.1.10]

Option #3: Embed Siebel UI within Oracle Service Cloud

If you would like the ability to utilize a combination of the Oracle Service agent desktop in combination with the Siebel agent desktop, it is possible to embed the Siebel UI directly within the Oracle Service UI using the Siebel OpenUI functionality.

Siebel's OpenUI Client is available as part of the 2012 Innovation Pack. It works with all modern browsers, and is straightforward to deploy for employee and partner-facing rich internet applications (RIAs). The Siebel OpenUI provides a device driven layout to render optimally in any device or browser.

This is an excellent approach if you are looking to add multi-channel functionality to your Siebel deployment. For example, if you would like to enable your agents to handle both voice and chat requests from customers, the Siebel Agent Desktop / Service Request object can be embedded with the Oracle Service Cloud. This enables agents to utilize the full range of multi-channel functionality from Oracle Service Cloud, while still inputting data directly into the Siebel system.

![Figure 2: Siebel SR object exposed through Oracle Service Cloud Agent Desktop](image)

Option #3: Call Siebel Web Services from Oracle Service Cloud

If you would like to use the Oracle Service Cloud agent desktop, and just pull specific information from Siebel into Oracle Service, this can be done by calling Siebel web
services. In the screen shot below, you will notice that the agent is using the Oracle Service agent desktop. Information such as Contacts and Service Request history are being pulled from Siebel through web services, and displayed through the Oracle Service Agent Desktop.

![Figure 3: Siebel information exposed through Oracle Service Agent Desktop using web services](image)

Data Layer Integrations

Both Siebel and Oracle Service have their own data models which need to hold core contact and account/company information.

The best practice is typically for Siebel to be the customer master, with Oracle Service as the “client” application. The two applications can synchronize core Contact and Account/Customer information via web services.

Siebel workflow is used to declaratively setup and maintain real time web service calls from Siebel to Oracle Service whenever contact or account information is changed. This typically includes names, addresses, and other contact point information – phone numbers, emails, etc.

Oracle Service can also be setup to make real time calls to Siebel inbound web services to make real time updates to contact and account information.

This combination enables agents to change core customer data live, when they are online with a customer, regardless of the system in use at the time. Siebel’s audit trail capabilities will always be available to track changes made on all customer data, which system they originated in, and which user made the change.
Conclusion

Oracle Service Cloud complements Oracle’s Siebel Contact Center and Service with Customer Portal Self Service / self service mobile, multi-channel functionality such as chat, email and co-browse as well as knowledge management and agent productivity tools.

By leveraging Oracle Service Cloud with Oracle Siebel Service in an integrated model, customers can achieve a state of the art multichannel service management solution process, reduce costs, and streamline the IT environment. Various factors, such as software application features in use, specific data setup and integration needs, and technical methodology preferences all influence each customer’s unique integration requirements. Given those variations, this white paper illustrates best-practice concepts in a model that can be leveraged as a guideline for any customer undertaking an integration project.