

Siebel CRM Open UI



To respond to the need for broad support of clients and devices, to ease deployment, and support the best user experience for end users, Oracle provides a standards based, open client. Open UI uses a single framework to meet the demand for a variety of use cases.

Employee partner or customer facing, mobile or desktop, touch, keyboard or mouse use as well as accessibility can all be supported with this framework.

The Open UI framework enables organizations to create a User Experience suited perfectly to user roles and their daily application use, across desktop, tablets and phone.

User Experience

Users continue to leverage the familiarity gained through prior Siebel versions but supplement usability from modern JavaScript consumer applications, used by roughly 60% of all leading web based applications. Many aspects of the UI have been revamped to bring new highly intuitive features to the client.

SIEBEL CRM OPEN UI

UI framework which is adaptable and based on industry standard technology

- Device driven layout to render optimally in any device or browser
- Left hand or tab navigation personalization option
- Accessible
- Native browser integration for: browser history, print/print preview, call, email via hyperlink, zoom, find.

KEY BENEFITS

- Design once, deployment anywhere
- Developer friendly
- Intuitive, persona and role based UI design

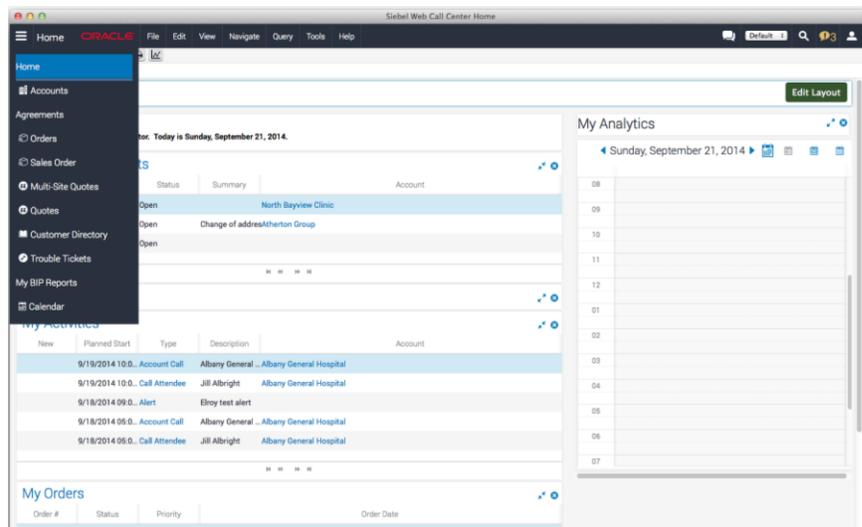


Figure 1: Modern user experience on any browser and for any device

OPEN UI EVERYWHERE

All Siebel CRM applications (both core and industry applications) are now available and fully rendered with Siebel Open UI.

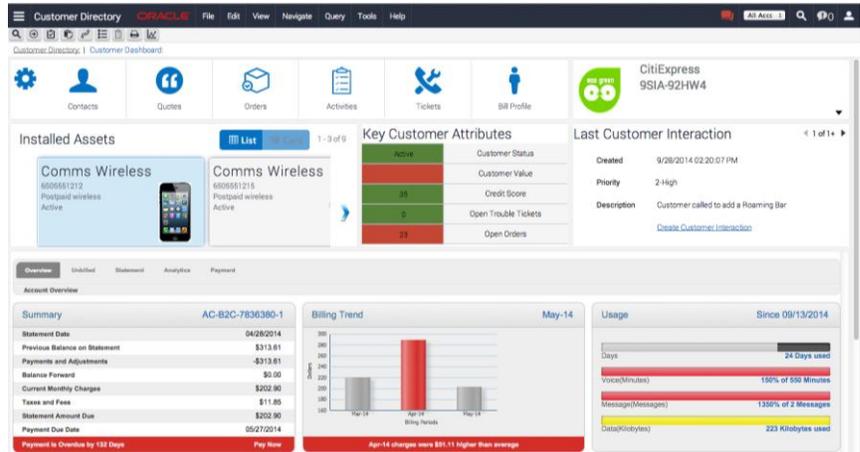


Figure 2: Communications industry specific user dashboard

USER EXPERIENCE

New features include:

- Siebel Calendar synch (CalDAV)
- Simplified Search
- Elastic List Applets
- Attachment drag and drop

Modern Design

- Full support for mobile devices: Fully device driven layout using responsive web design principles for the application to match the browser and device form factor
- Multiple navigation personalization options, such as tab, left hand and "Side" menus
- Fully accessible without configuration
- Simplified user experience through graphic icons and new themes.
- Personalization options themes.
- Easy to customize HTML5 based web templates.

Simplified Search

The search user interface in Open UI is simplified and enhanced with a focus on usability which is also aligned with popular search engine user experience. Support for additional external search engines allows for greater flexibility in the application search functionality.

Key enhancements include:

- Dockable Search Results Pane: Search results are 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 are 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

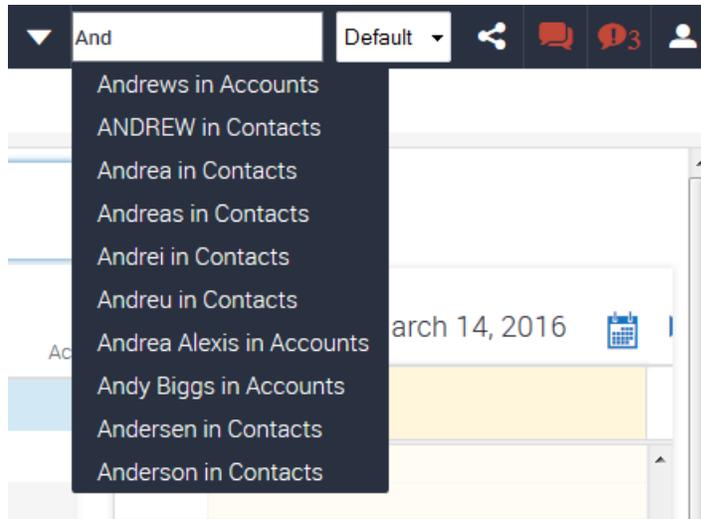


Figure 3. Auto Complete in the single Field Search, predicts what the user is trying to search for in the whole application.

UI Controls

Open UI user interface controls include:

Modern Controls

- Grid / forms
- Map Integration ability (requires configuration)
- URL Integration
- Date and time fields
- Can support keyboard only and touch only access.
- Accessible Navigation model
- Calculator
- Image support in Lists & Forms
- Multiple file upload/download Control
- Analogous Pick lists, Shuttle Applet and MVG's
- New Menus and toolbars
- Calendar

New Look and Feel

- SmartScript
- Task Based UI
- Customer Order Management
- IHelp

Native Features

- Browser history management
- Print and print preview
- Zoom
- Search

- Save Page

MOBILE DEVICE FRIENDLY

The Siebel Open UI framework also allows Siebel CRM to run on multiple mobile devices, including iOS, Android and Windows based tablets, and leverage native device capabilities such as location services, email, camera and signature capture.

- Fully responsive web design
- Fully Accessible compliant
- Based on industry standards

Development features

- Ability to Extend Siebel UI using JavaScript and open source controls

New Look and Feel: Setting End User Preferences

Open UI provides new user preferences under Tools, Preferences, and then Behavior. Users can set left-hand navigation or side menu or tabbed UI options as well as setting themes for the UI.

Open UI Portals

Both employee and customer facing portals are available in Open UI, all with a mobile friendly user experience.

Portals include:

- eSales
- eCustomer
- eMarketing
- Partner Commerce

These portals allow organizations to market, sell and serve their customers

SIEBEL MOBILE 2.0

Mobile solutions for Siebel CRM:

- Siebel Mobile 2.0 app for iOS and Android
- Siebel Remote using Oracle Database XE
- Siebel Field Service Mobile

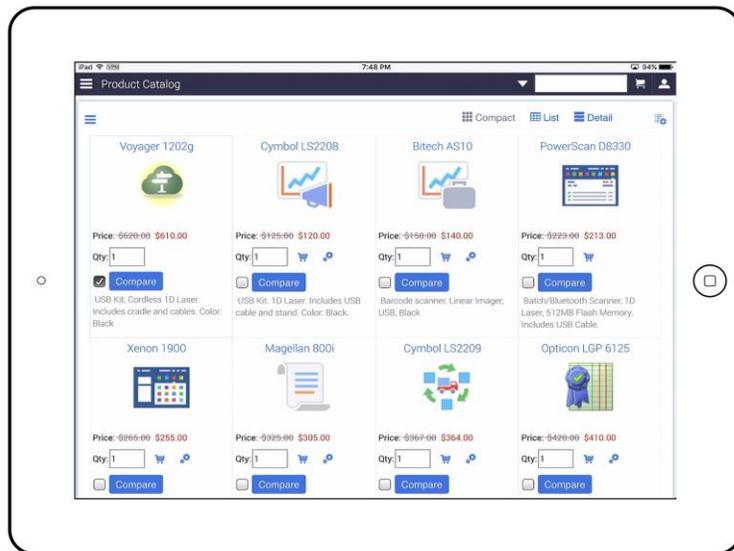


Figure 4. The new eSales Open UI portal application shown running on a tablet.

Open UI Mobile Applications

Siebel CRM Field Service Mobile

The Field Service Mobile application has a modern user experience created in Open UI

with an additional theme called 'Zante'. The application supports both connected and disconnected mode.

This application for service technicians provides features to:

- View activities and plan for the day
- Check trunk and parts order
- View tasks associated with the Service Request
- Track parts, time, and expense
- Provide Service Report and Invoice generation
- Integrate electronic signature capture
- Optionally attach media (images / videos)

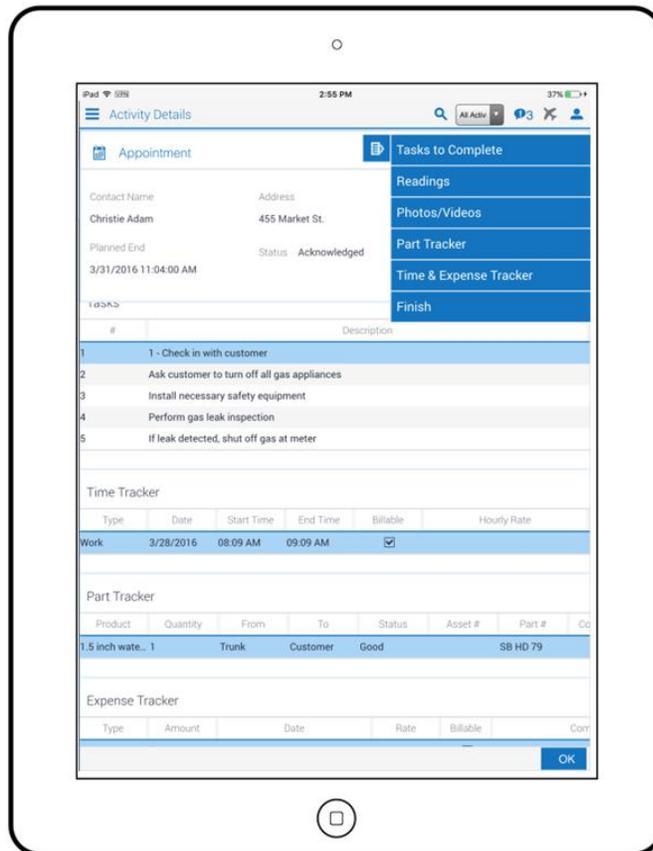


Figure 5. The Field Service Open UI mobile application shown running on a tablet in portrait mode.

DEPLOYMENT BENEFITS

Key deployment benefits:

- URL & Credentials only
- HTML5
- CSS3.0
- JavaScript (Standard ECMA-262 conformant)

Complete UI Flexibility

Deployment and Integration

The Siebel application architecture consists of multiple layers;

- Data layer (database tables and columns)
- Objects Layer (BOs and BCs)
- UI Layer (Views, Applets controls)

EXTENSIBILITY BENEFITS

Key extensibility benefits:

- Extensible presentation model and physical renderer to meet virtual any CRM use case
- Full branding capabilities
- Application Focus State management capabilities
- Hierarchical, embeddable Presentation Model.
- Partial refresh
- W3C IFrame conformance

- Presentation Model and Physical Renderer (View and Applet Web Template).

Siebel Tools allows configuration of Data Layer, Objects Layer and UI Layer. Bindings between UI layer and Physical UI Layer were also created in Siebel tools.

Open UI provides the ability to fully modify the physical UI layer. Customers are open to create unlimited customization. The new client provides true Web-based client deployment. To log in, users must have a URL and credentials. There is no requirement for browser configuration.

Deployment & Integration Features

- Supports full extension of the presentation model and physical renderer to meet any CRM use case
- Application Focus State management capabilities
- Full branding capabilities
- Hierarchical, embeddable Presentation Model.
- Partial refresh
- iframe based portal integrations

Open UI Themes

With the Open UI framework it is easy to create custom themes for your application, so you can style the application exactly how your business decides. Themes can be user and persona based or different for mobile and desktop.



Figure 6. An Open UI application application theme called 'Synergy' illustrates how different the Siebel CRM application UI can look.

True standards based Web Based client

Open UI runs on any modern browser compatible with HTML5 support to render Siebel, future proofing browser deployments.

- URL & Credentials only
- HTML5 – minimum requirement
- CSS3 – supports advanced styling options.

- JavaScript (Standard ECMA-262 conformant)

The latest versions of Internet Explorer 10/11, Google Chrome, and Mozilla Firefox are supported via HTML5 standards. This platform supports Android and IOS platforms such as iPads and Android tablets, Windows tablets as well as other standards compliant client and mobile platforms. It should be noted that Open UI fully supports touch interfaces in mobile browsers. Siebel Mobile and Siebel Open UI share the same UI elements and framework.

Multilingual

The Open UI framework supports running the application in multiple languages and locales including complex displays such as Hebrew, Japanese etc.

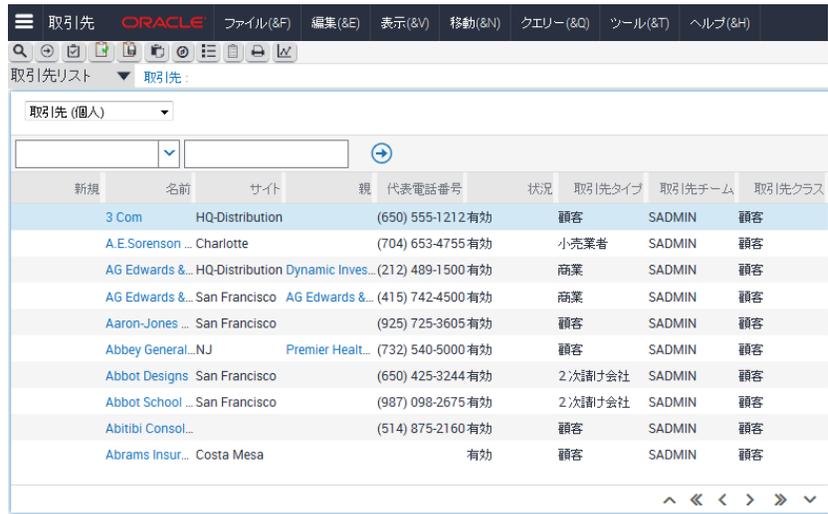


Figure 7. The Siebel CRM Open UI application shown in Japanese.

Extensibility: Development and Configuration of the UI

To achieve the best possible user experience, Open UI provides a fully published JavaScript API to build powerful CRM solutions. That API allows customers to easily extend the capabilities of Oracle provided features. The new API supports anything from simple validations to replacement of whole UI components that require very specific rendering styles. In addition Siebel's new implementation of CSS allows extreme ease of branding the user experience. Literally any aspect of colors fonts, layout and styling can easily be manipulated via CSS in Siebel.

Customers can continue to use tools they are accustomed to or use the new web development extensibility to build features previously unachievable, using traditional means.

Migration from High & Standard Interactivity to Open UI

Because 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.

Further information is available from the previously published [Statement of Direction IP2016 Client Platform Support](#) available on My Oracle Support (Article 2017902.1).

Get Started with Open UI

Enable improved usability, deployment, development and integration options with Open UI and expect many other benefits of deploying Open UI. For detailed information please read the Siebel Open UI Best Practices - Deployment Guide available on My Oracle Support (Article 1499842.1)

<https://support.oracle.com/epmos/faces/DocumentDisplay?id=1499842.1>



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