

Siebel CRM Reports

ORACLE

SIEBEL
CUSTOMER RELATIONSHIP
MANAGEMENT

KEY BENEFITS

- Reporting solution based on industry standards
- Integration based on standard Siebel EAI and Web Services
- Many output formats including: RTF, PDF, XLS, PPT etc
- Complete multi-lingual solution, supporting all application language and locale combinations as well as non-standard custom locales

The Siebel CRM integration with Oracle Business Intelligence Publisher (BI Publisher) provides an enterprise reporting solution to author, manage, and deliver all types of highly formatted documents eliminating the need for costly point solutions. Extremely efficient and highly scalable, BI Publisher can generate tens of thousands of documents per hour with minimal impact to transactional systems.

With over 100 standard reports, users can generate reports in many output formats, schedule reports, run reports in different languages and with runtime parameters. End users can easily design report layouts using familiar desktop tools, dramatically reducing the time and cost needed to develop and maintain reports.

Easy to develop and deploy

Developing Oracle BI Publisher reports is a simple process; templates can be created and tested with Microsoft Word using the BI Publisher plug-in. Once complete, the report template is registered in the Siebel application. There is no need to deploy new reports with system downtime. It is possible to create reports with default languages, output formats and across un-related Siebel data entities. Completed reports can be opened in the My Reports view which shows detailed information about reports generated.

For Administrators, it is also possible to review reports usage statistics across all users in the Enterprise by means of standard administration reports. For Mobile clients, reports templates are also synchronized as part of the mobile synchronization process.

Administration

Report Administration views etc. to manage user templates and executed reports, from My Reports View, My Teams, My Organization and All Views. Standard reports exist to analyze system report usage, for each user, and statistical analysis on any failed or long running reports.

KEY FEATURES

- High performance and secure platform solution
- Fully scalable and highly available architecture supports many different topologies
- Integrated with many other Enterprise products reducing TCO
- Scheduling functionality
- Runtime parameters
- Report and template sharing for a variety of visibility levels
- Administration reports for Usage Analysis
- Over 120 standard reports
- Open UI reports mode is Intuitive and designed for tablet use
- Use of Open UI notifications feature for report generation and viewing reports

RELATED PRODUCTS

Oracle Business Intelligence Publisher
Siebel Open UI



Reports Usage Statistics

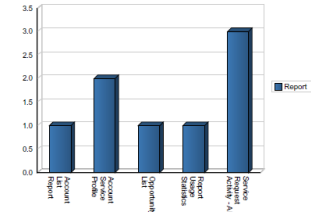
Date: 2012-01-11 08:01:49
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Dashboard

Total Reports	8	Total Success	5	Total Error	0	Average Time (s)	28.80
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Most active reports (Top 10):

Report	Count	Percent
Service Request Activity - All	3	38%
Account Service Profile	2	25%
Account List Report	1	12%
Opportunity List	1	12%
Report Usage Statistics	1	12%



Most active reporting users (Top 10):

User	Count	Percent
Siebel Administrator	8	100%

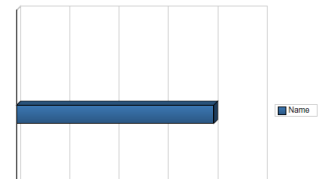


Figure 1. Reports Usage Statistics for Administrators.

Open UI intuitive usability for tablets

With Open UI there is an intuitive user interface to execute reports, designed for use with all browsers and tablets.

- Improved usability using collapsible menus, buttons and no pop-ups
- User has application context immediately after report execution which improves productivity and ensures no time is lost waiting for a report to generate

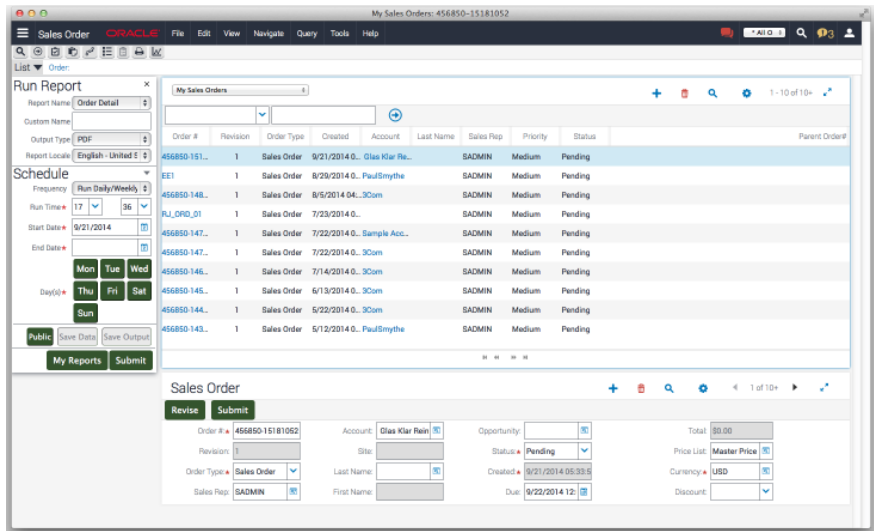


Figure 2. Reports user interface in Open UI.

- Less button clicks to execute reports and open the report output
- Open UI notifications to show reports generated and open the report directly from the notification list

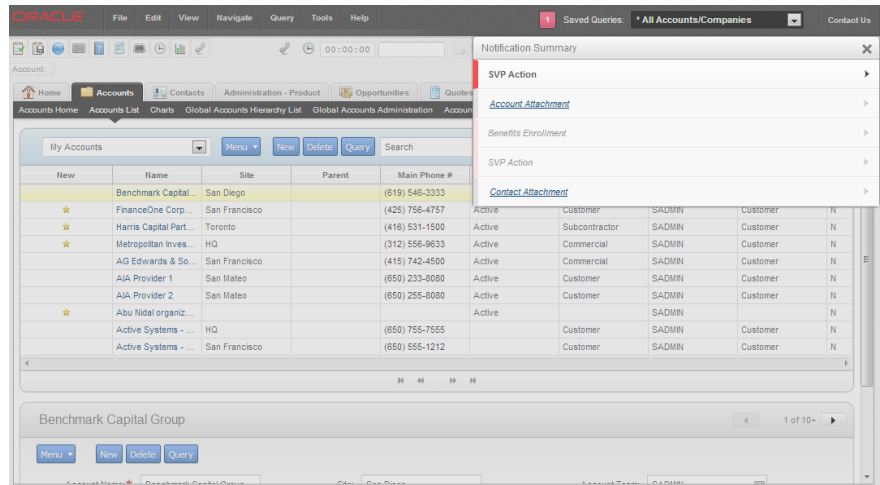


Figure 3. A list of Reports notifications in Open UI.

Architecture and Security

In the Siebel Web Client the reporting integration with Oracle BI Publisher is a decoupled architecture allowing complete scalability. The BI Publisher server offers high availability, clustering and load balancing. BI Publisher server can deploy into any supported J2EE server available on a wide range of platforms.

There are many available security models supported by the integration: Siebel Security, LDAP, BI Publisher Security and BI Server Security. This caters for many different application deployment topologies with Siebel Enterprises.

Where security models are shared across applications, a single BI Publisher instance can be used for reporting from more than one application (Siebel, JD Edwards etc), or where separate applications are deployed beyond the firewall i.e. Siebel internal and portal applications. Where standard security protocols are shared it is also possible to use BI Publisher instance as part of an OBIEE server.

Reports Scheduling

It is possible to schedule Siebel reports in a variety of frequencies, immediately, daily, weekly and monthly. Scheduled reports via the Report Business Service can also be sent directly to outbound delivery channels such as printers, email, fax, WebDav etc.

Parameterized Reports

It is possible to define reports that accept runtime parameters which can be entered by the user to filter and provide simple, dynamic business logic to the generated report. Parameters are defined in the Siebel application against a report template for example: Name (multi-lingual), Type (Date, LOV, Check box, String), Default Values, LOV (MLOV), required and so on. Parameterized reports can also be scheduled.

Complete multi-lingual reporting solution

Siebel reporting is a complete multi-lingual reporting solution based on industry standards. When running a report from the Siebel application multi-lingual search specifications, Pre-Defined Queries (PDQs), Multi-lingual List of Values (MLOV) and locale specific data formats, are all recognized and translated accordingly. Template translation is handled by means of template XLIFF translation, therefore a single report template is maintained across all languages.

To run multi-lingual reports, only a single Application Object Manager is required. There is no dependency on an installed language or database character set. The solution also includes scheduling multi-lingual reports from a single Object Manager and multi-lingual run-time parameters and parameter names are possible.

Sharing reports and templates

Siebel reports that are generated can be shared with other users sharing the same position. Users will then see the shared reports in their My Reports view. Report templates that can be executed can also be shared with other users of the same position. This also allows for managers to see reports of their sub-ordinates using My Team Reports views. Report templates can also be defined per organization, providing specific reports for specific organizations (multi-org). There are also My Organization Reports views.

Business Service

The Report Business Service allows for reports to be executed as part of back-end business process, from script or Workflow etc. This offers complete flexibility for creating advanced reporting solutions, such as the specifying delivery channels: File Transfer Protocol (FTP), Web-based Distributed Authoring and Versioning (WebDAV), E-mail distribution, Send to Printer, as well as supporting all standard scheduling options. With the report business service you can also specify metadata such as the custom name, description, and tags as report parameters.

Correspondence and Proposal Documents

It is also possible to use the Reporting solution to create custom solutions to generate Siebel Proposals and Siebel Correspondence documents.

Standard reports

Over 120 standard reports are available out of the box, including:

- Calendar reports, Daily, Weekly and Monthly

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Generated by SADMIN

Calendar Monthly

Report Date: 19-APR-2011
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28/03/2011 - 02/05/2011

Siebel Administrator

March

28/03/2011 (Monday)

From	To	Description	Comments
03:00	03:15	VR_Contact_Activities_Description:	VR_Contact_Activities_Comments:
12:55	13:10	VR_Account_Activities_Description:	VR_Account_Activities_Comments:
20:00	20:30	Preparation for Corporate Presentation	
23:00	00:00	Conference call with Bob Steck	Bob would like a status on the three reports that were recently submitted

29/03/2011 (Tuesday)

From	To	Description	Comments
01:30	03:30	Presentation to Conner and Co.	
03:00	03:15	VR_Contact_Activities_Description:	VR_Contact_Activities_Comments:
12:55	13:10	VR_Account_Activities_Description:	VR_Account_Activities_Comments:
20:00	20:30	Preparation for Corporate Presentation	

30/03/2011 (Wednesday)

From	To	Description	Comments
03:00	03:15	VR_Contact_Activities_Description:	VR_Contact_Activities_Comments:
04:00	05:00	Deliver status on Phase III implementation	
04:00	05:00	Corporate Exposition	
12:55	13:10	VR_Account_Activities_Description:	VR_Account_Activities_Comments:
20:00	20:30	Preparation for Corporate Presentation	

Figure 4. Monthly Calendar report.

- Reports for Sales, Call Center, Field Service, Loyalty, Quotes
- Invoices, Expense reports and Industry specific reports including reports with signature display.



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