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Due to the nature of the product architecture, it may not be possible to safely include all features described in this document without risking significant destabilization of the code.
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SOLUTION OVERVIEW

For 25 years, Oracle has been offering leading-edge Customer Relationship Management (CRM) with Siebel. Our customers consider Siebel to be critical for managing customer and partner relationships. Because most enterprises customize it to fit business processes and back-office systems, replacing it with an alternative cloud product could incur unnecessary risk and cost.

Instead, you can migrate your existing Siebel implementation to Oracle Cloud Infrastructure to gain several benefits: better elasticity to support peak seasons and batch processes, the agility to use new capabilities when released, and lower total cost of ownership (TCO). With Oracle Cloud Infrastructure, you have granular control over your Siebel CRM environment and can use the same software, licenses, and training that your staff and end users use today. In addition, only Oracle offers consistent high performance at guaranteed service levels.

Top-Level Value Proposition

You can migrate most on-premises Siebel CRM deployments to Oracle Cloud Infrastructure without significant changes to configuration, integration, or business processes. On Oracle Cloud Infrastructure, our customers typically experience higher performance, better reliability, and lower cost versus continuing to run their Siebel CRM deployments on premises or on another cloud.

Oracle has a validated solution to accomplish these outcomes quickly and reliably, which includes procedures, supporting Oracle Cloud Infrastructure platform services, and reference architectures. These reflect real production environments and recommend best-practice implementations across areas such as security, network configurations, high-availability and disaster recovery (HA/DR), identity integration, and cost management. With this validated solution, you can take advantage of:

- Lower TCO than on-premises deployments and deployments on another cloud system, based on our findings to date that customers have validated
- No single point of failure
- Migration without the need for rearchitecture
- Rapid in-place technology refreshes, patching, and updates (the Siebel team now harnesses the CI/CD software development model)
- Proactive costs and usage monitoring with Oracle Cloud Infrastructure or Oracle Management Cloud and Siebel Templates
- Near-instant scaling up or down
- Ability to retain control over security and governance by using Oracle Cloud Infrastructure tools or tools that you use in your current deployment

TCO Analysis

Beyond the benefits of being straightforward to migrate, easier to manage, and more flexible to scale, running Siebel on Oracle Cloud Infrastructure is cheaper than running it on premises or in another cloud.

No two Siebel implementations look alike. However, the estimated TCO of this solution for a 5-year ownership can be up-to 35% less than running Siebel on premises and up-to 63% less than running on another cloud, based on the following assumptions:

- One production environment sized for 1500 users
- Oracle Cloud Infrastructure deployment with 64 Standard OCPUs, 1 TB of block storage, 1-Gbps FastConnect connection, backups, 1 TB DB storage, a single-node database, and a 15% cloud discount
- On-premises deployment with 11 servers (3 for DB servers, 4 for Siebel Application Interface and 4 Siebel Application servers) with cores ranging from 12 to 16 per server, RAM from 36 GB to 196 GB, 1TB SAN storage, and 1TB DB storage
- Cloud deployment on AWS with the same resources as Oracle Cloud Infrastructure
Proven Customer Success

Oracle Cloud Infrastructure customers have experienced many benefits after migrating their Siebel deployments to Oracle Cloud. Consider Smiles S.A., which operates customer loyalty programs that allow participants to redeem miles when they purchase airline tickets with GOL Linhas Aéreas Inteligentes S.A. or other partner airlines. The company, based in Brazil, processes more than 3 million transactions each month and handles 2 million airfare searches each day. By migrating its on-premises Siebel CRM implementation to Oracle Cloud Infrastructure, Smiles S.A. achieved the following results:

- Reduced downtime to nearly zero
- Increased the speed at which it could serve 15 million customers by 3 to 4 times
- Upgraded its outdated Siebel CRM to the latest version by using a simple patchset

Infrastructure and Tools

Oracle Cloud Infrastructure was designed to support workloads like Siebel. Oracle Cloud Infrastructure delivers higher-performance compute, storage, networking, and managed database instances that result in a better experience for your users at a lower cost of operation. Oracle Cloud Infrastructure is the only cloud where you can run Siebel with Oracle RAC or Exadata.

Oracle also plans to provide Siebel-specific tooling and automation to streamline deployment, migration, upgrading, and maintenance of your implementation. These tools will reduce the required time and expertise, and the risk and cost of migration and day-to-day operation.

Siebel Deployment Tool Options

You can deploy Siebel in two ways on Oracle Cloud:

- **Traditional installation from the Oracle Software Delivery Cloud:** Within your tenancy, you create the VM that you want to install Siebel on, using either Linux or Windows. For access to a Linux VM, use SSH; for Windows access, use RDP.
  After you access the VM, follow the installation instructions in the Siebel documentation.

- **Docker images:** You can deploy Siebel with Siebel CRM Docker containers in the following ways:
  - **Self-build from GitHub:** Follow the guide provided on GitHub and create your own containers.
  - **Install from Docker Hub:** Our goal is to make our containers available for download from the Docker Hub. Because this process is not yet complete, you can request them by submitting a service request (SR) to Tech Support. Support will send you a download link and password, with instructions for use and deployment. These instructions start at the same point after you have created the VMs that you plan to use within your tenancy and have access to them via SSH for Linux.

  Note: Siebel Docker containers are available for Siebel versions IP 19.9 and later, running on Linux.

The following figure compares the configuration of a traditional installation of Siebel and a container deployment.

![Figure 1: Comparison of a traditional installation and a container deployment](image)
Enterprise Manager and Oracle Management Cloud for Hybrid Application Management

Management tools provide a unified view of the health and performance of Siebel applications and infrastructure in a multicloud or hybrid-cloud environment.

CONSIDERATIONS FOR MOVING TO THE CLOUD

Oracle provides a baseline architecture that optimizes the Oracle Cloud Infrastructure capabilities and addresses most of the important technical and business requirements. This architecture enables you to achieve your deployment objectives without investing in a long analysis project. Perform small-use-case testing at a low cost instead of capital expenditure (CapEx)-intensive testing on premises.

Your strategy for moving your on-premises Siebel CRM to the cloud depends on your environment, customized configurations, and the applications that use your data sources. For any special requirements that are not covered by this reference architecture, other design choices are possible. We expect that the design process for any changes is easier when starting from a reference architecture.

Key Workload Requirements

The architectures that Oracle provides help you address these requirements:

- Designing for high availability (HA) and disaster recovery (DR)
- Deploying a secure architecture
- Matching your high-performance and highly isolated network model
- Migrating your application and database environments into the cloud
- Maintaining visibility of costs and usage
- Monitoring infrastructure health and performance

Migration

When you migrate a complex, highly customized, and deeply integrated application like Siebel, it’s important to do it with as little rearchitecture as possible so that downtime is limited and the transition is seamless for end users.

Oracle Cloud Infrastructure migration and deployment architecture for Siebel meets the following objectives:

- Migration of application configurations
- Migration of data
- Conversion from third-party databases
- Conversion from non-Linux servers
- Upgrade from older versions of Siebel

We recommend engaging Oracle Advanced Customer Service (ACS) or an integrator of your choice to help you migrate Siebel CRM to Oracle Cloud Infrastructure. Oracle ACS has the appropriate tooling to migrate Siebel Innovation Pack 2015 and later to Oracle Cloud Infrastructure quickly and efficiently.

Also, if you want to upgrade your Siebel implementation to a newer version, upgrading during migration reduces costs by eliminating the need to conduct testing twice—once for migration, and once to upgrade.

Online Support

When transporting data, VMs, and files, it’s important to consider bandwidth and security. Organizations can migrate datasets over the public internet or set up private connectivity between on-premises data centers and Oracle Cloud Infrastructure. Data should always be encrypted at rest and in transit.

- **VPN over the internet:** Relatively small datasets, up to approximately 2 TBs, can typically be transported over the public internet without problems. Use a virtual private network (VPN) between the source environment and Oracle Cloud Infrastructure to ensure secure connectivity. Internet Protocol Security (IPSec) VPN is the best option in this case.
  
  The first step to setting up an IPSec VPN between the source environment and Oracle is creating a dynamic routing gateway (DRG) to connect Oracle Cloud with on-premises routers. Use multiple IPSec tunnels to ensure redundancy.
• **FastConnect**: Oracle FastConnect is another option for securely connecting on-premises data centers and networks to Oracle Cloud Infrastructure. It’s the right choice for organizations that need to transport large datasets. Port speeds are available in 1-Gbps and 10-Gbps increments when working with a third-party connectivity provider, and 10-Gbps increments when colocating with Oracle. FastConnect enables you to quickly scale up, scale down, and terminate connections as needed. For example, you might set up a 1-Gbps connection to transport a single application with a small dataset during the testing phase, and then quickly scale up to a 10-Gbps connection when deploying multiple applications with large datasets. Finally, you can quickly terminate the connection after the transfer is complete. For more information, see the [FastConnect documentation](#). Several Oracle partners offer solutions for setting up high-speed connections from on-premises data centers or other public clouds to Oracle Cloud Infrastructure.

• **Storage Gateway**: After a secure connection has been established, you can use Oracle Cloud Infrastructure Storage Gateway to securely create copies of on-premises files and place them into Oracle Cloud Infrastructure Object Storage without the need to modify applications.

### Offline Support

For organizations that have large, petabyte-scale datasets and are concerned about long upload times, we recommend the Oracle Cloud Infrastructure Data Transfer service. This service uses commodity hard disks or the [Oracle Data Transfer Appliance](#) to quickly and securely transport data to Oracle without going over the internet.

Each data transfer appliance enables you to migrate up to 150 TB of data. You can request an appliance through the Oracle Cloud Infrastructure Console after creating a transfer job. The appliance must be configured and connected to the on-premises network. Migration teams must also mount NFS volumes off the appliance and copy the data to the appliance. After the data is copied, you ship the appliance back to Oracle and monitor the status of the data transfer.

After all the VMs, data, and files have been securely transported to Oracle Cloud Infrastructure, you can provision and deploy the target environment.

### Network and Connectivity

The primary objective for the networking and connectivity architecture is to provide secure, high-speed connectivity between your cloud resources and any users and systems that need to access those resources.

When running Siebel on Oracle Cloud Infrastructure, the networking and connectivity architecture meets these objectives:

- Access from corporate campuses to the application through private network links
- Encrypted links over the public internet (optionally, you can deploy FastConnect for dedicated private connectivity to your deployment in Oracle Cloud Infrastructure)
- Public internet endpoints
- Private network connectivity to other systems or services hosted on Oracle Cloud Infrastructure
- Network-level isolation between application tiers
- Monitoring and management access to all application and database tiers
- Load balancing across multiple application nodes for performance and availability
- Isolation from other customers and your other workloads
- Low network latency in remote data centers

The following figure illustrates the networking and connectivity reference architecture. Descriptions of the numbered areas follow the figure.
Figure 2: Networking and connectivity reference architecture
1. **Secure network access via IPSec VPN:** For lower-cost but secure access over the internet, you can use an encrypted IPSec VPN tunnel to connect from your on-premises data center to your Siebel resources in Oracle Cloud Infrastructure. From your on-premises environment, you can access your cloud instances in a private subnet by connecting through a DRG. The DRG connects your on-premises network to your cloud network.

2. **Dedicated network access via FastConnect:** Multiple partners in regions worldwide offer dedicated network connections between your on-premises and Oracle data centers. As a result, you can access the Siebel implementation as if it was running in your own data center. For more information, see the [FastConnect product page](#).

3. **Built-in, preconfigured Oracle Cloud Infrastructure load balancing:** Preconfigured, redundant load balancers are available on private and public subnets to balance traffic in the implementation and from external connections. For more information, see the [Load Balancing product page](#).

4. **Secure access to any tier through the bastion host:** The bastion host is an optional component that you can use as a jump server to access Oracle Cloud Infrastructure instances in the private subnet. You can also access the instances in the private subnet by using dynamic SSH tunneling.

5. **On-cloud network isolation through a VCN:** A virtual cloud network (VCN) is basically your own private network within Oracle Cloud Infrastructure. It isolates your Siebel workload from any other workload on Oracle Cloud Infrastructure, including your other workloads in a different VCN. You can subordinate your VCN by using subnets to ensure resource isolation and apply security rules to enforce secure access. You can also add route tables and rules to send traffic out of your VCN, similar to traditional network route rules. You can create instances in a private or a public subnet, based on whether you want to permit access to them from the internet. Instances that you create in a public subnet are assigned a public IP address, and you can access these instances from the internet. Conversely, you cannot assign a public IP address to instances created in a private subnet, and you cannot access these instances from the internet. You can, however, add a NAT gateway to your VCN to give instances in a private subnet the ability to initiate connections to the internet and receive responses, for the purposes of applying OS and application updates. NAT gateways don’t receive inbound connections initiated by the internet. We recommend creating separate subnets for each tier—such as bastion host, database, application, and load balancing—to ensure that appropriate security requirements can be implemented across the different tiers. For more information, see the [VCN and subnets documentation](#).

6. **Multiple internal firewalls:** A security list provides a virtual firewall for each tier, with rules that specify the types of traffic allowed in and out.

### Resiliency and High Availability

Oracle Cloud Infrastructure’s resiliency and high availability (HA) architecture builds resiliency, redundancy, and HA into the cloud infrastructure that supports Siebel CRM and its backend datasets.

When running Siebel on Oracle Cloud Infrastructure, the resiliency and HA architecture meets these objectives:

- Multiple active-active nodes at each application tier
- System resilience using multiple fault domains
- Backup strategy for nondatabase tiers
- Redundancy strategy for database tier
- Backup strategy for database tier

The following figure illustrates the resiliency and HA reference architecture for deploying Siebel in one availability domain. Descriptions of the numbered areas follow the figure.
1. **Load balancer tier:** We recommend having load balancers in their own tier or subnet to load balance traffic to Siebel AI servers. The load balancer receives requests from users and routes them to the application tier.

2. **Active-active server redundancy:** To ensure HA within an availability domain, deploy redundant instances of every component, using fault domains. All instances are active, and they receive traffic from the load balancer and middle tier.

3. **System resilience:** A fault domain is a group of hardware and infrastructure resources that is distinct from other fault domains in the same availability domain. Each availability domain has three fault domains. By properly using fault domains, you can increase the availability of applications running on Oracle Cloud Infrastructure. For more information, see the documentation for availability domains and fault domains.

4. **Database redundancy:** For performance and HA requirements, we recommend that you use two-node, Oracle Real Application Clusters (RAC) database systems, or an Oracle Database Exadata Cloud Service system in Oracle Cloud Infrastructure.

5. **Backup strategy for the application tier:** Configure backup of the application tiers by using the policy-based backup feature of Oracle Cloud Infrastructure Block Volumes. Block Volumes enables you to perform volume backups automatically based on a schedule and retain them based on the selected backup policy. Backups are encrypted and stored in Oracle Cloud Infrastructure Object Storage.

6. **Backup strategy for the database tier:** Manage backups using the OCI console or APIs to back up data to Oracle Cloud Infrastructure Object Storage. To back up or patch the database to Object Storage, the database system's VCN must be configured with either a service gateway or an internet gateway. For backup and patching, we recommend that you use a service gateway rather than an internet gateway.

**Disaster Recovery**

Oracle Cloud Infrastructure provides Siebel implementations that ensure that you can build DR into your deployment for unforeseen events that require you to fail over and still keep Siebel up and running.

- **DR within one region:**
  - Active-active components across availability domains
  - Active-passive components across availability domains
  - Regional subnets across availability domains
  - Load balancing across availability domains
  - Storage synchronization across availability domains
  - Database DR across availability domains
DR across multiple regions:
- Application replication between regions
- Storage replication between regions
  - Cross-region copy lets you asynchronously copy Object Storage
  - Cross-region backup copy for Oracle Cloud Infrastructure block volumes
- Database protection between regions

Reference Architecture for Deploying Siebel in One Region

The following figure illustrates the reference architecture for deploying Siebel in one region. Descriptions of the numbered areas follow the figure.

1. **Active-active components across availability domains**: The clustering of supported services across availability domains provides protection from a failure in one availability domain. In this architecture bastion hosts, and application tier servers in both ADs are in active state. For an active-passive architecture, synchronize application servers across availability domains by using rsync.

2. **Regional subnets across availability domains**: Regional subnets span the entire region like the one here for load balancer providing benefits like protection from AD network failure, simplified Siebel service deployment and management.

3. **Load balancing across availability domains**: Oracle Cloud Infrastructure public load balancing distributes traffic across Siebel servers across all configured availability domains, providing protection from an availability domain failure. We recommend having one active and one passive load balancer across two availability domains.

4. **Storage synchronization across availability domains**: Block Volume backups (boot and block) are replicated across all the ADs within a region (manual process using “rsync”), and can be restored to any AD within the same region. Object Storage is a regional service and data is stored redundantly across multiple storage servers and across multiple ADs automatically.

5. **Database DR across availability domains**: Depending on your use case and database edition, you can use Data Guard or Active Data Guard. Active Data Guard requires Enterprise Edition–Extreme Performance.

Reference Architecture for Deploying Siebel in Multiple Regions
The following figure illustrates the reference architecture for deploying Siebel across multiple regions. Descriptions of the architecture follow the figure.

![Figure 5: Reference architecture for deploying Siebel in multiple regions](image)

- **Active-passive components across regions**: If you use active-passive to synchronize application servers across regions, use rsync.
- **Load balancing across regions**: The 2nd load balancer in the 2nd region is on stand by and will start receiving traffic once the configuration is changed in DNS protecting traffic from a region failure.
- **VCN peering across regions**: VCNs can connect between regions within a tenancy or between tenancies. Connectivity is achieved using Oracle’s internal backbone between regions. If you have two applications running in two different regions, VCN peering allows them to communicate internally. For more information, see the remote VCN peering documentation.
- **Storage synchronization across regions**: You can back up block volumes between regions by using the console, CLI, SDKs, or REST APIs. Copying block volume backups to another region at regular intervals makes it easier to rebuild applications and data in the destination region if a region-wide disaster occurs in the source region. You can also easily migrate and expand applications to another region. With Object Storage cross-region copy, data asynchronously copies objects between buckets in the same region or to buckets in other regions.
- **Database DR across regions**: Depending on your use case and database edition, you can use either Data Guard or Active Data Guard. Active Data Guard requires Enterprise Edition–Extreme Performance. For more information, see the Oracle Data Guard documentation.

### Security and Identity

The objective of the security architecture is to enable you to maintain your security posture when running business-critical applications like Siebel in Oracle Cloud. Although you’re reducing the overhead of building and maintaining data-center infrastructure, you still need control over and transparency into what you’re running in the cloud. With the identity access management architecture, you can group and isolate resources according to your organizational structure and hierarchy. You can also control who has access to cloud resources, what type of access a group of users has, and to which specific resources.

Oracle Cloud Infrastructure’s security architecture helps you meet these objectives:

- Ensure that Siebel and associated data assets are isolated
- Protect internet-facing applications
- Encrypt data
- Segregate operational responsibilities and restrict access to cloud services
- Use existing and third-party security assets
- Audit and monitor actions
- Demonstrate compliance readiness

The following figure illustrates the security reference architecture provided for Siebel running on Oracle Cloud Infrastructure. Descriptions of the numbered areas follow the figure.

Figure 6: Security reference architecture provided for Siebel running on Oracle Cloud Infrastructure
1. **Virtual private cloud**: Provides isolation for Siebel CRM from any other workload on Oracle Cloud. Subdivide using subnets and apply security rules to isolate and control access to resources.

2. **Internet firewalls**: A security list provides a virtual firewall for each tier, with rules that specify the types of traffic allowed in and out.

3. **Secure load balancing**: TLS 1.2 is supported by default to securely balance traffic within the implementation and from external connections.

4. **Secure connectivity to the internet**: Internet traffic to and from a VCN must pass through an internet gateway. Virtual route tables can be implemented with private IP addresses for use with NAT and third-party firewall devices.

5. **Secure connectivity to your data center**: Private traffic can be routed through a DRG, which is used with an IPSec VPN or FastConnect connection to establish private connectivity to your on-premises or other cloud network.

### Cost Management and Governance

In a capital expenditure (CapEx) model, many costs are fixed at the implementation of a project. In an operating expenditure (OpEx) model, costs scale up and down with usage. When your organization transitions from a CapEx model to an OpEx model, you often need cost-management tools to help you understand and control these costs.

Such tools help you to meet these requirements:

- Set and manage cloud budgets
- Prevent overspending
- Ensure accurate cost tracking across departments and projects
- Analyze which departments, services, and projects are contributing to cloud usage over time
- Get granular usage details for invoice reconciliation
- Identify areas to optimize costs

Oracle provides the following cloud platform services to meet these needs:

- **Compartments**: You can use compartments to isolate cloud resources between departments. You can also use them to logically group resources for measuring usage and billing. We typically recommend creating a compartment for each major part of your organization (business unit or department). You can also nest compartments to support subdepartments. For more information, see Managing Compartments.

- **Tagging**: You can use tags to track the cost and usage of resources that are associated with a particular project that spans multiple departments. Also, you can streamline resource management by tagging and then scripting bulk actions on exactly the Oracle Cloud Infrastructure resources that you want. Tags use policies and controls to ensure tagging integrity and to prevent users from creating excessive tags and duplicate tags, and manipulating existing tags. For more information, see Tagging Overview.

- **Budgets**: After resources are assigned to compartments that match your specific use cases, departments, or regions of operation, you can set budgets. You can view how spending is tracking against these budgets, and configure alerts so that unexpected usage is flagged before a budget is exceeded. For more information, see Budgets Overview.

- **Cost analysis**: The billing cost analysis dashboard can help you visualize the big buckets that are contributing to cloud usage and cost. You can analyze costs by cloud services, compartments, and tags. For example, an analyst or administrator can use this tool to identify the difference between increased production and dev/test usage, or the difference between increased storage and networking usage. For more information, see Billing and Payment Tools Overview.

- **Detailed usage reports**: Usage reports are CSV files that contain detailed resource-level and hour-by-hour data, including all associated metadata, that is, tags and compartments. You can export these CSV files and import them into existing business intelligence tools for invoice reconciliation use cases, to get more granularity into your bill, and to identify areas for cost optimization. For example, you can combine the detailed usage data with CPU utilization data from the Oracle Cloud Infrastructure Monitoring service to identify instances with low CPU utilization to shut down.

### Monitoring

To optimize Siebel CRM performance always and in real time, you need to be able to monitor the health and capacity of cloud infrastructure resources. Objectives include ensuring the availability and performance of Siebel CRM on the cloud, and
detecting and fixing anomalies before they can impact your business. Also, you might want the ability to identify bottlenecks and underutilized resources so that you can optimize accordingly.

You might already be using monitoring tools like Oracle Enterprise Manager and Oracle Management Cloud for your existing Siebel CRM deployment. Oracle Cloud Infrastructure offers infrastructure monitoring natively within the console, but it can also support your existing monitoring tools.

Depending on whether you migrate all Siebel CRM applications and datasets to Oracle Cloud or maintain a hybrid cloud environment, Oracle recommends the following monitoring tools:

- **Multi-tier monitoring of hybrid or multicloud environments**: For most multitier migration scenarios, we recommend using Oracle Management Cloud. Oracle Management Cloud provides integrated monitoring across hybrid and multicloud environments. It performs monitoring by using agents across various tiers, from infrastructure to application performance, security, and even end-user activity. And it integrates with Oracle Enterprise Manager for Oracle Database performance and capacity analytics. For more information, see Oracle Management Cloud for Siebel Applications.

- **Oracle Cloud Infrastructure Monitoring**: The Monitoring service provides cost-effective and out-of-the-box metrics and dashboards for monitoring cloud resources such as compute instances, block volumes, virtual NICs, load balancers, and object storage buckets natively within the Oracle Cloud Infrastructure Console. For example, you can use monitoring to track CPU utilization and memory utilization, and integrate with compute autoscaling. You can also integrate with open source visualization tools, run your own metrics queries, and have your applications emit their own custom metrics. All of this enables you to visualize, monitor, and get alarms on all critical time-series data from one place in the console. For more information, see Monitoring Overview.

- **Siebel Management Console (SMC)**: All features of SMC remain available to customers running Siebel in Oracle Cloud Infrastructure and work just as they do on premises. For information about these features, see the Siebel documentation.

Oracle Cloud Infrastructure performs agentless monitoring. Currently, this native infrastructure monitoring service doesn’t monitor database services. We recommend that you use either Oracle Management Cloud or Oracle Enterprise Manager, depending on whether Oracle Database is deployed on-premises or as a cloud service.