



Siebel Business Applications 8.0
Planned Features
May 2006

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Purpose Statement

THIS DOCUMENT PROVIDES AN OVERVIEW OF FEATURES AND ENHANCEMENTS INCLUDED IN ORACLE'S SIEBEL CRM 8.0 RELEASE. IT IS INTENDED SOLELY TO HELP YOU ASSESS THE BUSINESS BENEFITS OF UPGRADING TO SIEBEL CRM 8.0 AND TO PLAN YOUR I.T. PROJECTS.

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Siebel Business Applications Version 8.0 Overview

Oracle's Siebel 8.0 release of Siebel Business Applications introduces the next major evolution of Siebel's industry-leading CRM applications. Oracle plans to include in Siebel 8.0 a broad set of new and improved capabilities focused on accelerating the definition and execution of processes to meet the ever-changing needs of the business. Moreover, it is planned that Siebel 8.0 will offer powerful enhancements to make end-users more productive in carrying out these processes. These planned new capabilities aim to improve the usability and value of CRM across all 23 of Siebel's industry applications.

Siebel 8.0 is built atop the Smart Web Architecture introduced and extended through multiple Siebel releases. It is planned that this architectural consistency will provide a straightforward migration path from prior releases of Siebel Business Applications to an extensively production-proven technology platform. At the same time, it is planned that Siebel Version 8.0 will significantly improve the infrastructure capabilities and maturity across multiple phases of the applications lifecycle to further reduce the cost of maintenance and ongoing operations, in turn improving the ROI of Siebel Business Applications deployments.

This Planned Features document provides a preliminary overview of the primary enhancements planned for Oracle's Siebel 8.0, and is grouped into four categories:

- **Increased Flexibility.** It is planned that Siebel 8.0 will provide both a new Workflow Tasks module and a new Business Rules Engine, which together are intended to improve the ability of Siebel Business Applications to reflect and enforce core business processes, while improving business efficiency and consistency.
- **Improved Enterprise Usability.** It is planned that Siebel 8.0 will further empower users across multiple channels with: more advanced search and query capabilities; improved Customer Order Management capabilities, designed to extend reach through the Web Channel; mobile solutions that are more secure, manageable, and user friendly; and support for new deployment platforms, including Tablet PCs. In addition, Siebel 8.0 plans to expand its world leading sales management capabilities with enhancements to support sophisticated forecasting, strategic account development, partner lifecycle management, and improved territory alignments for improved sales effectiveness.

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- **Enhanced Reliability and Scalability.** In Siebel 8.0 Oracle plans to increase the capabilities and maturity of the platform supporting Siebel Business Applications to reduce investment and improve the return from Siebel deployments by simplifying multilingual and IBM zSeries upgrade paths, extending integration with performance and functionality test suites, and increasing support for automated application management, operations, and monitoring.
- **Extended Industry Specific Capability.** Siebel 8.0 builds upon the 11 years of deep industry expertise, with planned extension to the industry-specific footprint across Financial Services, Communications, Media and Energy, Life Sciences, High Technology and Industrial Manufacturing, and Public Sector.

Additionally, this Planned Features document includes information about both the platforms and languages planned for support in Siebel 8.0's release, which is currently anticipated in FY2007. Oracle intends to license new features highlighted in this document separately from other Siebel 8.0 modules.

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Increased Flexibility

One of the most important business benefits provided by Siebel Business Applications is the ability to ensure the consistent and efficient execution of an organization's customer-centric business processes. Adherence to rapidly changing processes is critically important to both business agility and compliance with an increasing number of regulations. Siebel 8.0 plans to build on the extensive business process automation capabilities of Siebel 7—which includes Siebel Workflow, Siebel State Model, and iHelp—with two new modules: Siebel Workflow Tasks and the Siebel Business Rules Engine.

Siebel Workflow Tasks

Siebel Workflow Tasks is intended to extend business process automation across the “last mile” directly to the point of user interaction. Siebel Workflow Tasks are multiple-step, interactive operations that can include branching and decision logic. A new wizard-like user interface is planned, that guides the user through task execution, allows navigation both back and forward within task execution, and enables task execution to be paused and resumed at any point. This combination of features is intended to help Siebel Workflow Tasks to increase the efficiency of novice or intermittent users by guiding them through the execution of unfamiliar tasks, while also increasing the efficiency of busy veteran users in interrupt-driven environments who need to switch seamlessly between multiple tasks throughout their working day.

A Siebel Workflow Task may define a single distinct operation such as filling out an expense report, but it will also be able to be incorporated as a step in one or more broader-based Siebel Workflows defining end-to-end processes. For example, a more broad-based Siebel Workflow could include not only the single step to fill out that expense report, but also the process for routing that expense report through multiple levels of review and approval, as well as integration with external systems for payment account setup and provisioning.

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The Siebel Workflow Tasks module incorporates a broad set of planned features designed to support these varied use cases, including:

- Directing navigation and execution across multiple screens and views.
- Incorporating decision processes requiring complex logic to determine the appropriate sequence of activities and content at each step—for example, presenting appropriate upgrade or up-sell products based on the customer’s geography and current products.
- Applying sophisticated validation to enforce rules in the execution of the process, such as ensuring that the customer must provide a written statement of fact within 14 days of opening a credit card dispute, or else the case will be automatically closed.
- Incorporating integration to external data or logic into the processing of a task, such as invoking an external credit engine to determine an applicant’s creditworthiness when taking an application and then submitting identification information to the customer master database for validation.
- Providing the user with extensive guidance and supporting information to help ensure accurate execution of complex processes complemented by effective, on-point communication. This is particularly important in solution-selling scenarios such as gathering all of the information and applying the logic to complete a financial needs analysis, the recommendations from which must then be sold back to the customer.
- Coordinating multiple actions that include a logical transaction that must either complete successfully or be completely rolled back, such as when executing a transfer of funds between financial accounts.

In the Siebel Workflow Tasks module Oracle plans to include both a Task User Interface, which guides users through task execution, and a Siebel Task Designer, which configures them. Each is discussed in the following paragraphs.

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Task User Interface

The planned Task User Interface guides users through task execution, reducing navigational complexity, automatically executing decision logic, presenting data and descriptive information when and where needed, and enforcing standards and regulatory requirements.

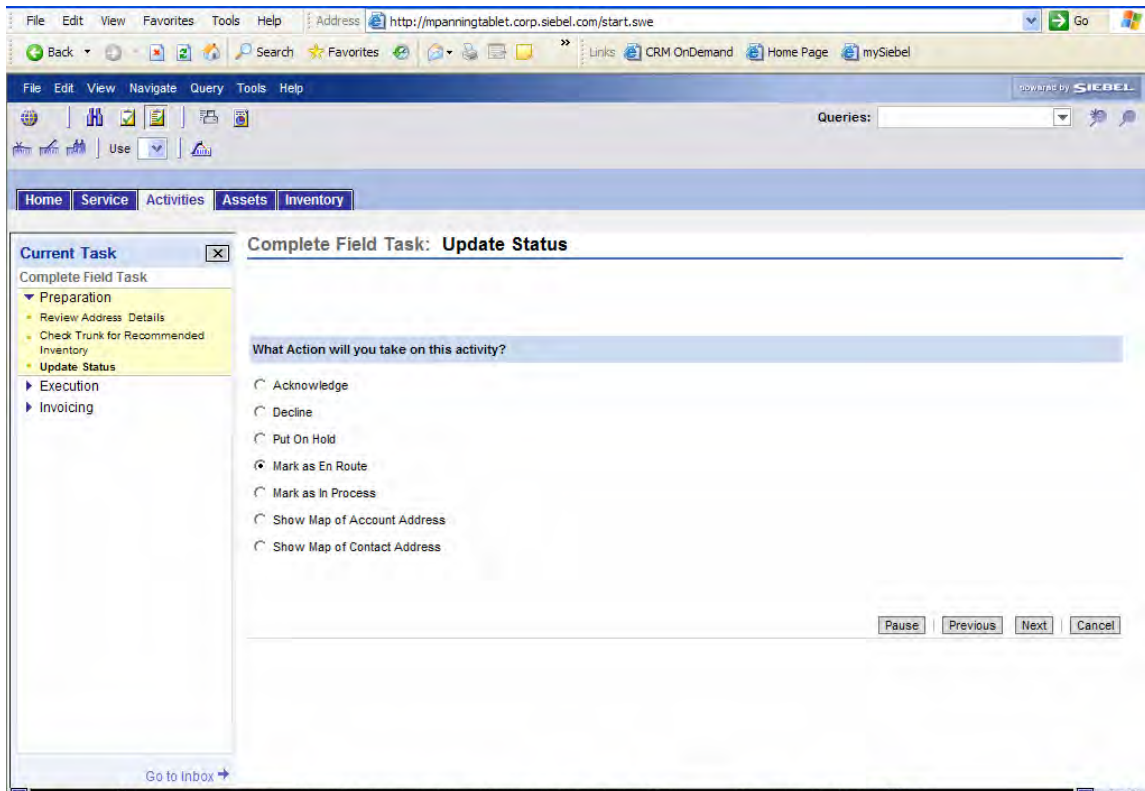


Figure 1: The planned Task User Interface guides the user through the sequence of interactive steps associated with a business process.

The Task UI includes the following planned features that support task execution:

- **Task Pane**—It is planned that the left side of the screen will contain a context-sensitive listing of the tasks available to users, which are pertinent to their current context. Once the user has invoked a given task, the Task Pane shows the sequence of steps in that task.
- **Playbar**—The planned Task screen has a standard set of four buttons that control navigation through the task flow, including moving forward and back through the steps and providing the ability to pause a task for later resumption or cancel it.

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- **Radio Buttons**—Planned Radio buttons are intended to support decision-making within a task. Based on the choices within a task, users can be taken to different branches and different screens.
- **Universal Inbox Support**—It is planned that tasks will be able to be transferred between users for reassignment, approval, or consultation through the Universal Inbox. All tasks are stored and accessed from the owner's inbox.
- **Delayed Commits**—It is planned that the information gathered during the execution of a task is not committed back to the underlying Siebel objects until the user fully completes the task. This allows the task to be suspended in a partially completed state without needing to complete all validation steps.
- **Task Analytics**—It is planned that task metrics will be able to be pulled into a data warehouse to measure standard metrics such as task completion rates, average task time, and task type trends. A number of predefined tasks are planned for inclusion with Siebel 8.0, both to improve user experience with the out-of-the-box Siebel Applications and to provide the best configuration practices and sample implementations for customers configuring their own tasks. The predefined tasks include:
 - **Field Service Activity**—The Field Service Activity task guides field service engineers through the multiple steps involved in handling a customer service call, from checking proper inventory and tools, to notifying the dispatcher when traveling or on site, and to generating the invoice for the customer once work is completed. The Field Service Activity task organizes these disparate elements into one intuitive flow that increases the efficiency and consistency of field service operations. Activity plans may be accessed via Web services in order to coordinate work across disparate systems.
 - **Managed Service Contracts**—Contracts covering a large number of assets are very profitable for service companies, but the administration of those contracts is difficult due to the number of records involved. The planned Managed Service Contracts task simplifies the creation and maintenance of contracts with a large number of assets.
 - **Wireless Order Management**—Customer Service Representatives selling complex, configurable products such as cellular phones must walk customers through a number of steps, including choosing the right phone, configuring it with options, and creating or updating the customer account. The planned Wireless Order Management task guides the user through each of these steps, simultaneously reducing call handling times and ensuring complete execution of each step.

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Siebel Task Designer

The planned Siebel Task Designer is expected to provide a familiar, graphical flowcharting interface for defining Siebel Tasks, which consists of one or more steps such as start steps, subtasks, decision points, view steps, and Siebel Operations. The Task Designer is tightly integrated into the Workflow Process configuration environment to greatly simplify the process of configuring complex, long-lived business processes into Siebel Business Applications.

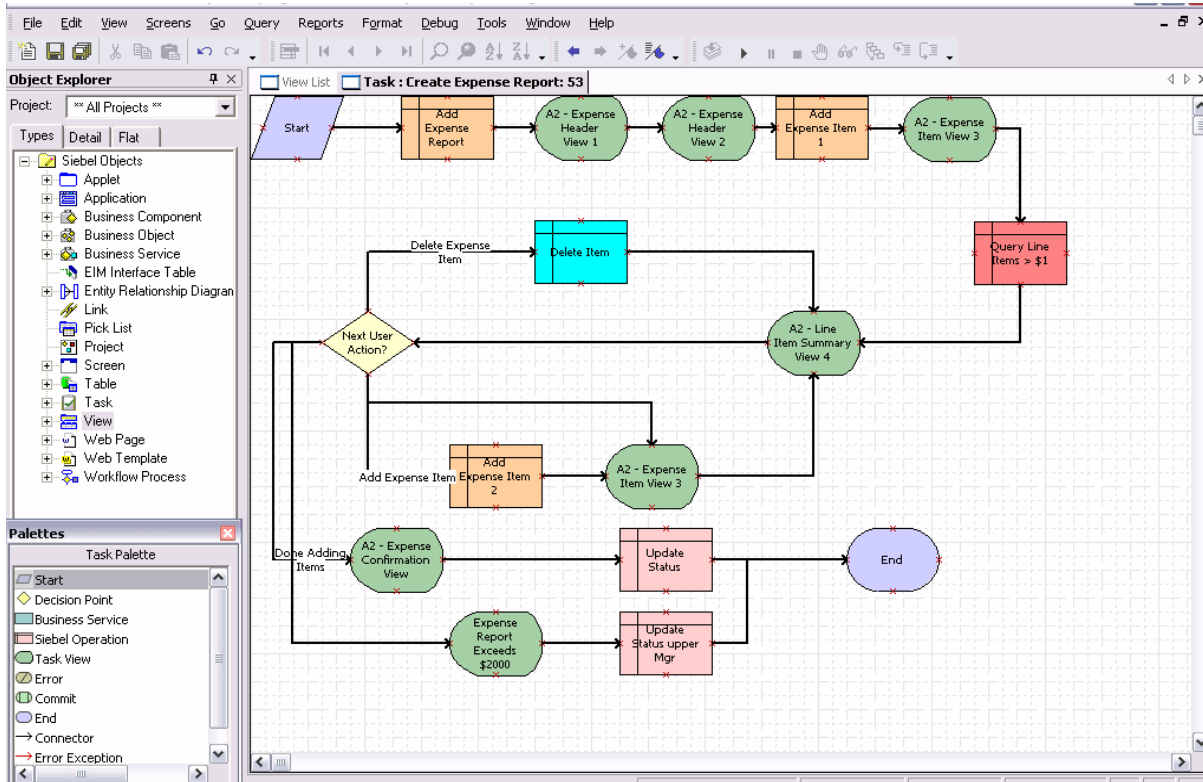


Figure 2. The Siebel Task Designer is intended to provide an intuitive, flexible development process through visual flow design.

The Siebel Task Designer is intended to support rapid task configuration through the following planned features:

- **Task Designer**—A familiar flowcharting-style user interface that enables visual flow development using a canvas and a palette.
- **Task View Step**—A new step in the Task Designer that enables a developer to map a business process to the Siebel user interface.

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- **Transient Business Components**—Business Components that can be used to house data to control the flow or logic, but that are not stored in the database and are cleared when a task is completed.
- **Four New Wizards**—The following wizards are planned to automate the process of defining the components of a task:
 - The Task Wizard automates the creation of a task, including the initial steps required for a task to run.
 - The Task Applet Wizard creates task applets that map to transient business components.
 - The Task View Wizard generates the views with which users interact, ensuring that all required elements are included and exposed.
 - The Transient Business Component Wizard automates the creation of transient business components and fields.
- **Publish and Activate Toolbar**—A planned new application-level toolbar is intended to enable developers to revise and deploy tasks with a single button click.

Using the advanced tooling and user interface enhancements, Siebel's Task Based User Interface is expected to allow users to navigate complex logic intuitively and quickly. The end result is intended to be reduced training, increased efficiency, and higher user adoption, enabling customers to fully implement their best practices within Siebel.

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Siebel Business Rules Engine

New in Siebel 8.0, Oracle intends to include a Siebel Business Rules Engine to provide an easily configured, high-performance module for defining and enforcing the rules that govern how a business operates. Rules can be applied to problems as diverse as calculating the risks involved in insuring a given individual, determining the appropriate discount level to be applied to an order, or deciding whether the warranty for a given product is still in force.

The Siebel Business Rules Engine includes a simple, graphical user interface for defining rules that is designed for business administrators, removing the need to configure rules in IT-maintained code and greatly reducing the time needed to reflect business changes in Siebel Business Applications.

It is planned that the Siebel Business Rules Engine will be able to be invoked from multiple components within Siebel Business Applications, including through Siebel Workflow and Siebel Workflow Tasks, from events on all Siebel Business Components, and from Siebel eScript and Siebel VB scripts, as well as through Siebel applications' various integration interfaces. This planned feature is intended to support a very high degree of reuse, so that a given set of rules needs to be configured only once to execute with complete consistency across Siebel Business Applications.

By using the Siebel Business Rules Engine to replace complex scripts with simple business rules, it is intended that Siebel customers will be able to significantly reduce the cost of configuration and improve the performance and maintainability of their Siebel Business Applications deployment. Furthermore, by using the Siebel Business Rules Engine to automate complex logic that cannot be effectively configured in Siebel scripts, Siebel customers are expected to be able to use Siebel Business Applications to deploy much more powerful and comprehensive business processes across the enterprise, significantly increasing efficiency, effectiveness, and compliance.

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Improved Enterprise Usability

In the Siebel 8.0 release of Siebel Business Applications, a number of new and improved features are planned that are expected to increase the usability and usefulness of Siebel Business Applications, as well as improve the support for a number of deployment platforms to facilitate their deployment across a broader spectrum of users and usage scenarios.

New Universal User Interface Style

The visual style and layout of any application's user interface is an important factor in driving the appeal, adoption, and productivity of the end user. Siebel 8.0 will taken the preferred styles from the broad product offering as well as used industry standards to produce a sharper user interface.

Some of the characteristics that are planned for this new user interface style include:

- **Simpler Visual Style**—New colors, fonts, and icons are expected to be more visually appealing and help brand each topical area more clearly.
- **New Action Pane**—A dedicated side bar is expected to provide immediate access to frequent actions and information the user needs, including enterprise search, links to the new Siebel 8.0 Task Based User Interface, and iHelp. The Action Pane can be quickly expanded or collapsed as needed.

Siebel Data Quality

Poor customer data quality is an impediment to CRM success. It is critical that each customer experience, through any channel or representative, is consistent and builds upon each previous experience. Fragmented data or incorrect data, such as multiple instances of a single customer or a wrong address, interferes with vital customer and operations insight at the moment of contact. This lack of a single view of the customer often results in missed opportunities to serve the customer. The costs of poor data quality go beyond excess storage for duplicate or bad data, and cut into the productivity of the business user and ultimately affect customer satisfaction.

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Siebel 8.0 plans to build upon existing data quality support to include new features and enhancements that are intended to increase the overall quality, completeness, and accuracy of customer data, enabling organizations to get a complete view of the customer information. These planned improvements fall into the following three categories:

- **Data Matching**—Customers who want to identify multiple occurrences of a record can use the enhanced data matching capability planned in Siebel 8.0. These enhancements include updated, more sophisticated matching algorithms and preconfigured rules for various data sets, such as name and address. An enhanced, flexible user interface also is expected to allow data quality administrators and data stewards to more easily extend or manipulate these data matching rules.
- **Data Management**—Siebel 8.0 plans to introduce new business services that are designed to better manage and monitor customer information across multiple applications. New business services planned for inclusion in Siebel 8.0 include support for name and address standardization and validation, data matching, auto de-duplication and external data enhancement and validation. Through these new business services, organizations are expected to be able to more efficiently and proactively standardize their customer data and analysis at any point of customer interaction.
- **Universal Data Quality Integration Framework**—Siebel 8.0 intends to extend its universal framework to support integration for all third-party data quality solutions, including matching and cleansing, with any Siebel applications, including Siebel Marketing and Siebel Universal Customer Master (UCM).

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Siebel Audit Trail

Companies are always challenged by the necessity of protecting their information effectively. Today, they are continuously at risk for violations of privacy and compliance regulations, as well as major financial losses from data theft and its ultimate impact on their business reputations. With Siebel 8.0 Oracle plans to deliver significant enhancements and new capabilities to effectively help organizations protect their information, ensure that data is compliant with privacy regulations, and assure that business effectiveness is not impacted by financial losses from data theft.

Enterprise Wide Audit Trail

To maintain data continuity and monitor activity in Siebel applications, customers can maintain an audit trail of information that indicates when business component fields have been changed, who made the change, and what has been changed. In Siebel 8.0 Oracle intends to embed a new audit trail mechanism that can be accessed throughout the Siebel enterprise. With this advancement, all actions across all Siebel-Object-Manager-based components, Siebel EIM, and Siebel Remote components are expected to be able to be consistently tracked. It is also planned that the Audit trail information will contain the source of the event that changed the information record, which aids in clearly identifying automated processes such as EIM transactions.

Read Audit

Data privacy regulations mandate some organizations to employ more stringent monitoring of access to their data, including when private data has been viewed but not modified. In Siebel Audit Trail Oracle plans to include read audit capabilities that automatically capture and record when information has been read using the Siebel Client but has not been modified. For common actions that do not involve online reading of individual records, such as mass export or print actions through the Siebel Client's applet menu, the read audit functionality will also track this type of viewing to ensure the complete documentation of record viewership.

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Siebel Search and Query

To maximize the efficiency and the effectiveness of the users of Siebel Business Applications, they must be able to easily locate and readily access a broad variety of information stored both within and externally to their Siebel applications. In Siebel 8.0 improvements to both Siebel Search and Query are planned that are intended to increase access to structured and unstructured data.

Siebel Search

In Siebel Search 8.0, Oracle plans to bring the paradigm of popular Web search engines—that of simple queries and straightforward navigation combined with tremendous breadth of coverage—to Siebel Business Applications, optimizing the search experience across multiple types and sources of information. Siebel Search 8.0 is expected to improve search engine capabilities, providing faster performance across a broad data set and offering a more intuitive interface through which users harness its power. With Siebel Search 8.0, Oracle intends to make customers' large and diverse knowledge repositories available to users in a central, transparent, intuitive interface, empowering users with rapid, easy access to critical information.

In Siebel Search 8.0, it is intended that users will begin searching from a simple, intuitive Search Pane, and can then expand their searches based on the results obtained from the initial search. Searches can be refined and saved for future use. A planned Advanced Search capability allows users to create searches that use more complex logic, such as Boolean or parametric search terms, for more focused searching. Search results mirror the traditional layout seen on common Internet interfaces, with a document title, short auto-generated summaries, sortable columns, and automated refinements based on keywords and document type. In short, Siebel Search 8.0 intends to deliver a more powerful, yet intuitive search interface.

Siebel Search 8.0 plans to expand the reach of search inside and outside of Siebel applications through a series of available prebuilt connectors, including those for Web content, files (with support for over 100 file types), and for IBM DB2, Microsoft SQL Server, and Oracle databases.

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Case- and Accent-Insensitive Query

Siebel 8.0 is expected to improve the manner in which database queries are performed using Siebel applications, allowing them to ignore both case and the use of accents to return all records that otherwise match the user's query value. This capability is particularly important when searching for records like contact or customer names in which capitalization (such as MacArthur *versus* Macarthur) or the use of accents is not consistent and an exact-match search would not return any records.

To ensure good query performance, an additional database column is used to store a transformed version of the target column. A new Siebel Tools wizard is used to configure transformations and enable this query on customer-chosen columns. A case-insensitive query will work on all databases supported for this release, but accent-insensitivity will work only on selected databases that natively provide that facility.

Enhanced SOA Enablement

With the growing maturity of XML and the use of Web Services, information technology (IT) departments now have a standardized means to build and integrate technologies together. Developers rely on Web Services to more efficiently share information among systems and deliver seamless solutions in a real-time environment. The underlying framework supporting this IT evolution is service-oriented architecture (SOA), which defines a common mechanism through which applications can communicate and exchange information. For the first time, businesses now have an effective means by using SOA to rapidly compose applications that cross areas the business, technologies and data stores.

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With this revolution under way, it is increasingly important that enterprise applications readily expose custom and pre-built logic easily for improved co-existence in the ever-evolving IT ecosystem. First supported in Siebel 7.5, Web Services enable developers to expose Siebel business objects for access for fundamental read, write, and update functionality. Siebel 7.7 built upon this functionality by allowing developers to expose business services as Web Services, and therefore call workflows and activate Siebel logic from external systems. The Siebel 7.8 Web UI DDK further exposed Siebel objects by providing tools to generate and publish Siebel services, and generate sample Java pages that could be used by developers to create custom Web user interfaces displaying Siebel content. Siebel 8.0 plans to extend SOA support further by taking high-value application engines and exposing their flexible component functionality as Web Services. As an example, Siebel 8.0 plans to deliver several new pre-built Web Services for critical business functionality areas such as Customer Order Management. These new Web Services—as discussed in the Customer Order Management section below—are expected to take advantage of these SOA infrastructure enhancements to improve cross-functional business processes as well as support a custom or composite user interface.

Siebel Customer Order Management

Companies have deployed numerous systems to plan, administer, execute, and enforce commerce policies across the various channels where business is conducted. These companies have found that they are no longer administering this policy data in one comprehensive system; they are challenged with managing these rules across numerous disparate systems. This reduces the ability of the enterprise to introduce new products and prices effectively across channels and results in customers receiving undesired inconsistencies across channels.

Siebel Customer Order Management 8.0 is expected to address many of these challenges by delivering pre-built Web Services that are intended to expose the industry-leading Customer Order Management capabilities to various channels and applications. This is expected to enable customers to extend this pre-built functionality further across their enterprises, seamlessly exposing this functionality in real-time through standard Web portals and other Web Service-enabled environments that service a significantly broader range of customers and interaction models. Examples of the Web Services that are planned to enable commerce data—administered in Siebel—to be extended outside of the Siebel application include:

- **Catalog Services**—Web services that will interact with catalog metadata and retrieve all available catalogs, product search, promotion, and product definition details for a given product selection session.
- **Configurator Services**—Web Services that will enable users to begin, interact with, and end a product configuration session.

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- **Pricer Services**—Web Services that will enable users to price or re-price an item or a set of items within the current customer/solution context.
- **Shopping Cart Services**—Web Services that will interact with Siebel quote/order objects and accomplish typical shopping cart management tasks.
- **Asset-Based Ordering Services**—Web Services that will enable users to do asset-based product selection operations such as modify, resume, and suspend for a given customer asset item.

Siebel 8.0 plans to deliver additional benefits to business administrators and end users, to improve product and price administration and the run-time experience through several new capabilities including:

- **Multi-Select Configurator Validation**—This is intended to enable sales and service agents to select multiple items with a configuration session and to validate these items as a group versus as an individual selection. This will help users quickly select a desired solution and then validate it *on demand*, as opposed to by validation after each individual selection. This ability is intended to improve the performance of the application by validating solutions instead of individual requests.
- **Procedural Condition Support**—This is intended to enable the administrator to define the sequence of product options selected by users so that they are able to optimize their experience as they navigate through the product selection process within the configurator. For example, customers ordering a computer will be presented with speaker options after they select the appropriate sound card.
- **Guided Price Administration**—Price Administrators will benefit from planned enhanced capabilities in defining the logic behind price execution procedures. The enhanced administrative framework provides users with a guided approach to implementing pricing procedures, thereby facilitating the rapid test and deployment of changes to corporate price execution policies.

By providing streamlined administration and run-time application enhancements, along with new pre-built Web Services capabilities, Oracle plans with Siebel 8.0 to ensure that Product, Price, and Technology Managers within the organization can extend the value of their CRM investment to administer, execute, and enforce commerce interaction across their enterprise commerce solutions. This streamlining is expected to enable the enterprise to introduce new products, prices, and promotions faster, while reducing the administrative overhead and increasing the consistency of their customers buying experience.

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Partner Relationship Management

○ *Partner Company Registration*

For an unregistered company seeking a new business partnership, self-registration is planned as a preliminary step towards becoming a qualified or registered partner in Siebel PRM. During company registration, the prospective partner must enter basic company information such as Company Name, Address, Company Contacts, Annual Revenues, # of Employees, and so on.

The user also must submit personal contact information and register for a User ID and password. Upon completing this registration process, the user is given a User ID and password with limited access to the system.

○ *Partner User Registration*

New users from a registered partner company will first enter a Company Identifier as the first step in the user self-registration process. After entering a valid Company Identifier, the user can then enter basic user information such as First Name, Last Name, Login, Password, Address, and so on.

Upon completing this registration process, the user is given a User Id and password with limited access to the system.

○ *Partner Program Enrollment & Renewal*

Organizations can expose partner program information and application links to new and existing partners in a planned catalog interface that is easy for partner users to navigate. It is planned that partner users will be able to view program literature, related prerequisite or addenda programs, and any applications previously submitted by their partner company.

A partner can only apply for a partner program if the company meets the eligibility requirements the brand owner defines for that program. Organizations are expected to be able to implement different designs and questions for each partner program for initial and renewal program membership applications.

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Service

○ *Service Request Management*

Facilities for creating, updating and reviewing service requests and details are planned to be exposed through business services, allowing customers to invoke this critical process from external systems and to expose service requests in the context of a non-native user interface.

○ *Copy Activity*

External business events, such as service escalations, that drive the creation of a set of activities from a template, are planned to be able to invoke these activities from a Web service which leverage the flexible underpinnings of the Copy Service. This service is intended to enable flexible rules for field substitution and provide support for extensive admin control of which objects, child objects, and fields are included in the templates and field mappings.

○ *Entitlement Verification*

Users and external systems are expected to be able to check the entitlement coverage by providing the defining account, contact, date/time, product and asset information, and then to get back the detailed entitlement(s) that apply. This might be used to consolidate contract and entitlement management into the contracts module, and to make this module accessible to processes outside the application.

○ *Asset Management*

In the process of managing their personal or company information, it is planned that users may register a new asset, its serial number, and other associated details. This registration is a critical first step in the process of requesting service or submitting a warranty claim for an install base item.

○ *Warranty Check*

It is planned that users and external systems that wish to check available warranties for a registered asset will be able to do so using this Web service.

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Siebel Sales

o *Sales Forecasting*

Sales forecast reporting and analysis provide a view of a company's sales pipeline, integrating information from sales, customer, and financial sources to create a picture of sales performance.

Organizations that offer multiple product lines with a large number of products and expiring inventory have faced significant challenges tracking revenue for a particular line of business. These organizations are looking for more granular forecasting schemes that allow sales professionals to aggregate revenues by certain groups or dimensions, such as by product line or by product. Sales representatives in industries such as consumer goods and manufacturing might sell and forecast various products across a number of geographical locations. Some products might be in the same product line, but might also be tailored for their specific market, which results in different SKU numbers. Typically, these organizations are forced to do forecasting by organization structure.

Aggregating different product dimensions, such as product line, across geographies, and aggregating individual products outside of product lines are typically not automated. Modern organizations have an increased need for flexibility in appropriately segmenting and analyzing forecasts.

Siebel 8.0 plans to allow the forecast administrator to define forecasting dimensions that fit the business. When the system generates the forecast, it will automatically apply these dimensions to organize and group the revenue information. For example, a sales operation administrator might define product line and product as two dimensions in the forecast. In turn, when the sales manager runs the forecast the system will generate forecasted revenues grouped by product line and product. This new feature is planned to give companies the ability to create the most complex forecasting scenarios through grouping and user-definable dimensions. Using these new techniques, sales professionals are expected to be able to easily create a more granular-level forecast series and proactively monitor the projected revenues for a particular line of business or product line, all in one consolidated forecast series.

Additionally, Siebel 8.0 plans to introduce forecasting by different units of measurement (UOM) by enabling automatic conversion of different product units (for example, gallon and liter in forecasting volume). This new functionality is intended to enable companies with global business models that forecast volumes for inventory and production planning purposes to take advantage of the robust unit conversion capability. It also is intended to enable a company's sales force to forecast product revenues with appropriate units of measure for its customers.

Managers often need to pull revenue data from their subordinates' pipeline in order to create their forecast. Changes at the subordinate level can alter the overall forecasted revenue. In

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Siebel 8.0, Oracle plans to allow managers the ability to initiate an update of their aggregate forecast and to automatically retrieve the updates made by subordinates since the last revision.

Overall, Siebel 8.0 Sales Forecasting is planned to provide organizations with the much-needed flexibility to serve their complex and individual forecasting analysis and planning needs, and to deliver to their ever-changing market conditions with agility.

Territory Management

Territory alignment is the process by which companies redesign their sales territories so that they have an equal distribution of workload or sales potential. As part of their sales planning process, companies might decide to set new sales forecasts for products within their portfolio, change the product mix for a sales force, or expand the size of one or more sales teams. These decisions have a direct impact on the structure of a sales force and on all the territories a sales force covers. The faster companies can implement new territory configurations within their transactional systems, the better they can react to changing market conditions and execute their sales strategy. However, a typical realignment process involves the execution of several disconnected, manual, and resource-intensive processes. These factors lead to the rigid alignment procedures that limit the frequency with which realignments are performed. As a result, the realignments are not performed as often as necessary, limiting a company's ability to swiftly launch a new product or to adjust the focus of a sales force in response to dynamic market conditions.

Siebel Territory Management is intended to enable organizations to realign sales forces in a shorter timeframe, validate alignments prior to deploying them in production, model several alignment strategies concurrently, and maintain a historical view of alignments and territories. The enhancements built in 8.0 are planned to further expand the ability of companies to manage their alignment processes. These planned enhancements include:

- **Approval Flows**—New features are expected to allow users to create an alignment and share it with sales representatives so that they can provide field expertise and validate the alignment. Changes suggested by representatives need to be approved by their managers. Approved changes are submitted back to the home office to be activated. Users are expected to have the certainty that the activated alignment has been signed off by the field. On the other hand, sales representatives are expected to have the assurance that the activated alignment meets their expectations. With this planned enhancement, companies are expected to be able to work out any discrepancies with the field ahead of time.
- **Territory Quotas**—By defining territory quotas (also called “scores” or “workload indices”), companies are expected to be able to monitor whether territories have gone out of balance as time goes by. Quotas may be defined by individual customer (accounts or contacts) or by postal code or brick. These individual quotas are then aggregated to determine the territory quota. Territory quotas are rolled up along the territory hierarchy to

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determine the quota of a district, region, or area.

- **Opportunity Assignment**—In this release, planned changes to Territory Management are expected to allow users to reassign opportunities as part of territory realignment. After accounts are reassigned among all the different territories within a sales force, the opportunities owners assigned to those accounts are also updated based on the new account ownership relationships. As a result, sales representatives are expected to be able to optimize their sales activities and administrators can manage opportunities more efficiently.
- **Enhanced Rollback Functionality**—With Siebel Territory Management 8.0, users are expected to be able to roll back minor alignments and to restore a territory rule to its previous condition before the alignment activation process took place.
- **Current State Replication**—In most cases, companies run major alignments at fixed intervals (yearly, semi-annually, or quarterly). Between major alignments, a sales force can be updated through a series of minor alignments. By combining these minor alignments into a new planned single alignment record, companies are expected to be able to reproduce the current alignment of a sales force.
- **Specify Addresses for the Realignments**—An alignment flag is planned to be added to the address field. Only contacts or accounts whose addresses have this flag checked will be considered during an alignment.
- **Multiple Hierarchy Support**—It is planned that users will be able to create more than just one rollup structure for a sales force.
- **Application Interfaces**—Siebel Territory Management 8.0 includes planned Application Services Interfaces (ASIs) for all entities, so that external applications can query and modify territory information defined within Siebel Territory Management.

These enhancements, in addition to the ones already included in previous versions, are intended to eliminate the pains related to realigning a sales force. By using Siebel Territory Management, customers are expected to be able to realign a sales force easily, eliminating the barriers that prevent companies from realigning their sales forces as often as necessary.

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Microsoft Office Integration

Sales professionals are often required to send email communications to a targeted list of customers for various reasons. For example, they might want to invite customers and interested prospects to the company's user week, new product introduction seminars, business trade shows or other related events. The preferred method of authoring and communication has been Microsoft (MS) Word and Outlook products. However, as part of the sales process, capturing these communications in Siebel environment is also of paramount importance. Additionally, these sales representatives need to perform detail analysis of their pipeline and forecast data, customer, and contact information with various measures outside the Siebel environment. This is typically done in MS Excel, which is designed to help knowledge workers with their data analysis tasks through advanced calculations, charting, and graphing capabilities.

Siebel MS Mail Merge capability is intended to allow sales professionals to create personalized form letters and to send mass email messages to a targeted list of customers. Sales professionals are expected to be able to create a list of recipients from various contact sources in the Siebel application, compose the message with embedded field substitution (such as customer First Name and Last Name), preview the message with actual customer data, send email, print the message, and finally, capture this communication as an activity in the Siebel Sales application. With Siebel Excel Integration in 8.0, sales representatives can easily select Opportunity, Account, Service Request, Forecast, or other Siebel components, define reporting criteria, and create custom reports for further analysis directly from the MS Excel interface. With a single push of a button they are able to refresh the generated reports and retrieve the latest and greatest data from the Siebel environment, and eliminate the need for recreating or managing different versions of the same report.

Siebel MS Office integration in 8.0 is planned to greatly simplify the process of mass email communication and data analysis, which in turn is expected to increase the user effectiveness in completing these tasks.

Portfolio Management Process

Salespeople who have the responsibility of managing a portfolio of accounts recognize the difficulties associated with relationship management, opportunity creation, and resource allocation. The Portfolio Management Process (PMP) is a structured account management methodology offered by OnTarget—a sales effectiveness group within Siebel Global Services that helps salespeople or account managers assess their accounts and apply the right strategies to reach an optimal mix of resource allocation and revenue achievement.

Siebel 8.0 plans to deliver a new Portfolio Management Process module with out-of-the-box support for the PMP methodology. By using this PMP module combined with the OnTarget

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methodology training, account managers are expected to be able to follow their methodology work within the Siebel software. This work includes: analyzing their portfolio of accounts; developing their high-business potential and most strategically important accounts; managing the opportunity pipeline and customer relationships within their accounts; and reviewing and implementing a portfolio plan that matches appropriate solutions to account needs.

Through Siebel's PMP 8.0, salespeople can more clearly assess their portfolio's potential and discover how they are achieving their targets against that potential. In addition, by providing this functionality within the Siebel software, salespeople are intended to be able to consolidate data capture and analysis in one place, and to share it across both actual and virtual account members including managers, who might review plan results. By combining the people, process, and technology behind the PMP process, organizations are intended to be more empowered to optimize strategic account development and increase revenue achievements.

Partner Lifecycle Management Enhancements

Siebel Partner Relationship Management (PRM) 8.0 plans to extend compelling capabilities for managing a partner lifecycle. Deep partner relationships are critical to ensure a successful business strategy in today's increasingly complex world of business solutions. Managing a partner relationship successfully depends on contracts. Renewing and initiating contracts in a timely manner is critical to maximizing opportunity and revenue capture and to the overall success of the contracted partnership. Equally important is tracking the behavior of unauthorized partners who continue to sell or service products without a contract.

Siebel 8.0 Partner Relationship Management plans to allow organizations the ability to automate the tracking of the partner's agreement and entitlements. For new partner program members, a PRM user is expected to be able to simply click one button and have the system automatically create a new or modify an existing partner agreement to include standard service or pricing entitlements defined for that program. In subsequent partner transactions, the system will validate against the entitlements to make sure that the appropriate services and pricing are applied for the partner.

By automating the key area of contracts and entitlements, organizations can execute more effective partnering, ensuring that all the needs of the contractual relationship are strictly enforced across the partnering ecosystem and enabling them to address their most pressing issues with renewed confidence and success.

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Siebel Marketing Suite

Across industries, marketing executives are being asked to do more with less while justifying and accounting for each dollar they spend. Yet many marketers are unable to measure the effectiveness of their spending or optimize the use of marketing resources due to ineffective processes, silo-based applications, and the inability to “close the loop.” Leading organizations also are seeking to apply best practice processes and technologies to more effectively manage the growing complexity of marketing and the transition from being product-focused to becoming customer-centric.

To overcome these challenges, Siebel Enterprise Marketing Suite plans to provide a comprehensive closed-loop solution that is intended to help marketing organizations achieve performance breakthroughs and to become more effective, accountable, and customer-centric. Tailored to the needs of business and consumer marketers across more than 20 industries, the Siebel Enterprise Marketing Suite is planned to empower every member of the marketing organization with customer and business insights that lead to more intelligent interactions with customers and to faster and smarter decisions about marketing investments.

The Siebel Enterprise Marketing Suite is planned as an insight-driven, end-to-end solution that is intended to link strategy and planning to multi-channel execution and measurement, and to uniquely guide marketers through tasks based on embedded best practices. It is expected to offer integrated but modular solutions covering planning and resource management, customer analytics and segmentation, campaign management, email and Web marketing, events management, partner marketing, trade promotions management, loyalty program management, lead management, and marketing analytics. Using the Siebel Enterprise Marketing Suite, organizations are expected to be able to acquire more profitable customers, cross-sell and up-sell more effectively, retain valued customers longer, accelerate time to market, and drive superior marketing performance.

Siebel Marketing Resource Management

In Siebel Marketing Resource Management (MRM) Oracle plans to provide a complete solution for organizations to more effectively plan, budget, execute, and measure the impact of their global marketing efforts, and to optimize the use of marketing resources. It is planned to provide a common language, analytics, and best-practice-based business processes. It is also planned to provide a system that empowers marketing users across the extended enterprise to more effectively and efficiently manage activities and resources, collaborate, and optimize investments. Siebel MRM is intended to automate key processes, including strategic and tactical planning, budgeting and expense management, approvals, program management and collaboration, enterprise marketing calendaring, content management, and financial reporting. By integrating analytical, collaborative, and

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operational marketing activities into a single platform, marketers can learn what is working and what is not and to execute smarter resource decisions faster, improving business results.

Marketing Initiatives. Marketing organizations need to make sure that all of their marketing activities are aligned to the top strategic initiatives of the company and business unit. In Siebel MRM 8.0, Oracle plans to introduce a new capability to define these strategic initiatives across the organization. Each initiative is expected to be tied to each of the planning steps, including marketing plans, specific marketing tactics, and activities. The result is a complete view that is intended to allow executives to better assess the adequacy and effectiveness of the marketing activities supporting each strategic initiative.

Marketing Funds Management. For many marketing organizations, especially those that operate across multiple business lines and geographies, tracking the sources, uses, and status of marketing funds is a significant challenge. Gaining control of these funds and maintaining continual visibility of the available fund balance are also complicated by the lack of consistent processes and by the use of multiple disconnected systems and media, including spreadsheets, email messages, and departmental databases.

To address these challenges, Siebel MRM 8.0 plans to support the creation and management of multiple marketing funds. Each group within an organization that controls a budget area, such as Americas or European Field Marketing or Corporate Advertising, can set up and manage marketing funds. Budget requests, purchase order commitments, and actual expenses can all be applied against one or more marketing funds. Each budget owner or team can then gain a real-time view of planned, committed, spent, and available amounts for their fund, while selected executives can view the status and current financial position across all funds or budget areas.

With the planned marketing funds capabilities in version 8.0, organizations are expected to be able to delegate budget and spending authority to the right level while having a consistent process and centralized repository for managing their marketing funds across the enterprise. Using role-based and real-time visibility, marketers are expected to be able to continually monitor the current status of their funds and more quickly make adjustments as market or financial conditions change.

Purchase Order Management. Support for standard and blanket purchase orders (POs) are planned for Siebel MRM 8.0, so that marketing plans, activities, and internal purchase requests can be tied to actual PO and invoice information. Blanket purchase orders enable a marketing organization to open a standing PO with a vendor, and bill multiple requests and activities against this standing PO. Standard POs are intended to be used for one-time activities. These new purchase order management capabilities are planned to allow marketing organizations to more easily synchronize their purchasing, accounts payable/general ledger, and Siebel marketing systems, improving financial control and agility.

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Real-Time Marketing Reports. Today's marketing executives must operate in a high-velocity environment in which they need to maintain real-time visibility into the status and effectiveness of their marketing investments. They also need to provide the tools that enable their teams to dramatically improve the speed and quality of their activities.

In Siebel MRM 8.0 Oracle plans to include a variety of real-time charts embedded in selected screens and displayed within the context of specific marketing processes spanning planning, execution and measurement activities. These charts are based on real-time data stored in the Siebel transaction database and do not require access to Siebel Business Analytics.

For example, Siebel MRM 8.0 is expected to include embedded charts such as the following:

- Forecast and Approved Budget by Marketing Plan
- Marketing Fund Balances
- Marketing Mix Analysis
- Spending by Tactic
- Budget Request Funding Sources
- Budget Request Allocation
- Fund Allocation and Fund Allocation Trends
- Budget Request Approval

Using real-time marketing reports in Siebel MRM 8.0, marketers are intended to have greater access to the real-time information they need to improve the efficiency and effectiveness of their activities.

Media Calendar. Siebel MRM 8.0 plans to provide a new media planning calendar to assist brand managers and marketing managers with better insight into all the media activities across the organization. This calendar is expected to enable each manager to view each media placement across channels, including one time or repeating spots in print or broadcast media.

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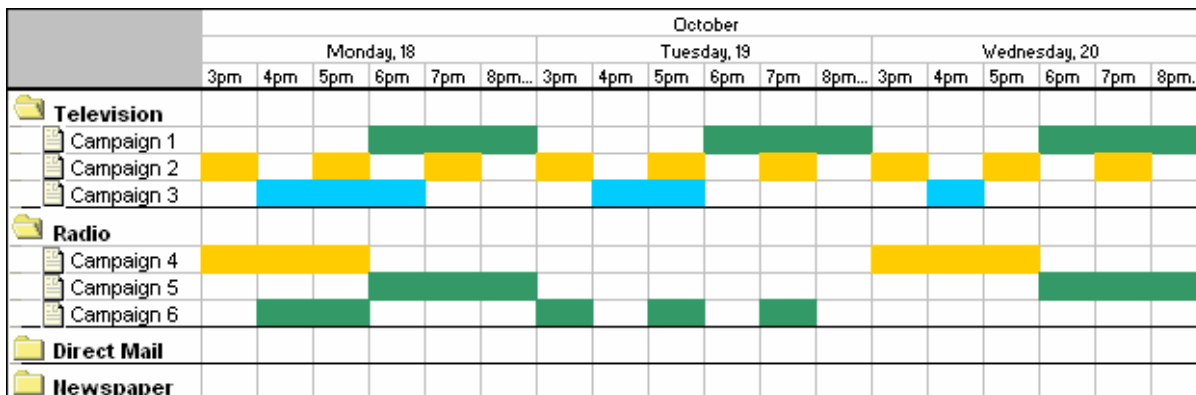


Figure 4: The Siebel MRM Media Calendar is intended to provide marketers with a real-time view of marketing activities across the enterprise.

Collateral and Asset Management. Marketing Departments need to make sure that their sales, marketing, and partner channels have an appropriate supply of current marketing collateral and assets, such as event displays, to support their efforts. Siebel MRM 8.0 is planned to include a full inventory management system for all types of collateral and assets. The solution is intended to provide a running inventory of each item, including proactive indicators that collateral or assets need to be replenished. Marketing users are expected to be able to submit online requests for new copies, including location information such as shipping address and other instructions. For more rigorous purchasing processes, the fulfillment process is planned to support tracking of vendors and multiple bids for fulfillment requests to make sure that the lowest-price supplier is always used.

Marketing Assets are planned to be fully integrated with Siebel Content Center, supporting enterprise wide tracking of virtual and physical content, including Web content, corporate documents, physical assets, and marketing collateral. Using Content Center, users are intended to be able to use version management for revision of content, create content projects so that related changes can be made together, and design and implement workflow-driven approval processes.

With the planned collateral and asset management capabilities in Siebel MRM 8.0, organizations are intended to be able to more easily monitor inventory levels, secure better prices on production and fulfillment jobs, and streamline distribution processes. As a result, they should be able to make sure that the right marketing asset is available at the right time and location at the lowest possible cost.

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Siebel Marketing Server

Siebel Marketing Server, Siebel Segment Manager, and Siebel Dialogue Manager are planned to enable advanced segmentation and targeting capabilities that help organizations more effectively deliver relevant messages at the right time to the right person. The waterfall-style reporting is intended to clarify the interaction between individual elements of the segment criteria.

The planned performance-enhancing mechanisms, such as sampled counts and intelligent caching, are intended to improve the level of interactivity for users during the segmentation process. Advanced sampling methods are intended to enable direct marketers to easily split segments into highly targeted cells. The planned robust list export capabilities are intended to simplify integration with other vendors and channels for campaign execution. When used in conjunction with Siebel Marketing Analytics, these modules are planned to be the true enablers of an insight-driven, end-to-end marketing solution that is intended to empower users with customer and business insights.

Extensible and Dynamic Segment Attributes. In selected situations, marketers want the ability to assign dynamic values and attributes to a segment or segment tree cell and want to have this information written to the database or in an external file for subsequent use. For example, a consumer goods company might want to assign a score to each cell or define the number of store visits or maximum discount allowed for different segments, and then communicate this information to each sales representative assigned to the accounts or contacts in the segment. Other marketers might like the ability to create a custom segment or segment tree cell description, label, or code and have this information available for downstream tracking and reporting purposes. This type of process has required extra steps and extensive manual intervention.

In Siebel Segment Manager 8.0, Oracle plans to solve these challenges by introducing the capability to allow end users to create custom and dynamic segment and segment tree cell attributes and scores that are then assigned (written-back) to individual customers or prospects in each segment or cell. The planned functionality allows marketers to implement classification and score-carding approaches for a wide variety of business scenarios. A marketing analyst should be able to classify and prioritize subsets of the customer base and then prioritize resources according to scorecard values for each customer segment. Information written-back to the Siebel database is intended to then be used, for example, by a workflow process to automatically create the appropriate communication treatments or activities. This planned functionality is intended to extend the tactical campaign management paradigm to enable powerful business planning functions such as resource allocation and optimization.

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Multi-Select and Display Control for Segment Manager. Enabling users to design sophisticated segmentation schemes is the heart of a marketing automation application. To further this key objective, Oracle plans to include with Siebel Segment Manager 8.0 usability features designed to make this key business process faster, more productive, and less error-prone, particularly when working with complex segmentation schemes. These planned enhancements include:

- **Multi-Select Support**—Users are expected to be able to perform a wide variety of actions to a group of cells as a multi-select action, dramatically streamlining the creation of large segment trees.
- **Display Controls**—Users are expected to be able to easily customize which sections of the segmentation and segmentation tree designer display they want to view at any moment, enabling them to use the screen space to best suit their preferred style of work.

List Preview and Download From Segment Manager. Often marketers want the ability to immediately preview and review a sample list or an entire list of contacts, accounts, or households that meet their specified criteria. In Siebel Segment Manager 8.0 Oracle plans to make this process significantly easier by providing the end-user an option to generate an export list directly from the segment designer or segment tree designer views. The list might contain all records or a subset of the records meeting the specified criteria. As a result, users are expected to be able to view all attributes of segment members during the process of creating their targeting criteria. Users are also expected to be able to generate lists from any branch of a segment tree, providing “one click” convenience for sampling the output of a segmentation scheme.

Campaign Load Export Options. Currently, during the campaign execution process, the campaign load step adds the members targeted for the campaign to the campaign history table within the Siebel transaction database. Some organizations with very large marketing campaigns prefer to write the campaign members directly to data stores outside of the Siebel transaction database (for example, a custom marketing data mart). In Siebel Marketing Server 8.0, Oracle plans to support this requirement by allowing campaign members to be loaded using direct database inserts into external data stores as an alternative to file exports. This feature is intended to provide a new high-performance option for generating campaigns and other result sets. In addition to dramatic improvements in export performance, this new capability is intended to extend the paradigm of campaign management to a variety of business processes that require updating of information within a database table. For example, a user could use the planned dynamic segment attribute capability previously described to classify account opportunities into priority tiers; this data could then be written directly to an opportunity table in a database where the information would drive individual account plans.

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Siebel Loyalty

Companies all over the world have embraced the concept of loyalty programs as an important component of an overall customer relationship management (CRM) strategy. Loyalty programs have had an impact across most industries. Some estimates suggest that there are over one billion people enrolled in loyalty programs all over the world. The driving force behind loyalty programs is simple: a marginal increase in loyalty typically generates a far larger increase in revenue and profits.

The challenge that many companies face is that their existing loyalty management systems are based on custom-developed software applications that are inflexible, expensive, and not well integrated. These systems do not allow marketers to differentiate their programs sufficiently from competitors or to react to shifting market dynamics by altering loyalty promotions and programs without significant additional IT involvement. Furthermore, these systems are not integrated with CRM systems and therefore cannot provide a complete view of a customer's information.

Siebel's comprehensive loyalty product offering incorporates three years of experience and validation with leading companies in multiple industries to identify and distill cross-industry best practices and requirements. The Siebel Loyalty Management solution is the first fully packaged loyalty management application offered by a large enterprise software company, and is expected to be the only fully integrated multi-channel loyalty product available.

Retroactive Tier Changes. In many loyalty programs, some customer transactions might have a time lag before they are reported to the company, due to customer service calls after the transaction date or to delays in receiving partner transaction data. In Siebel Loyalty 8.0, Oracle plans to support retroactive evaluation of tier changes and past promotions so that a loyalty member gets full credit for tier upgrades that should have occurred earlier due to unreported transactions. For example, if a valuable airline customer flew one month ago but forgot to provide the frequent flyer number at the time of the trip, the customer can provide the flight details to the carrier after the trip, and any upgrades of tier and resulting promotional bonuses will be credited to the customer's account.

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Siebel Universal Customer Master

As a core offering in the Siebel Customer Data Integration solution, Siebel Universal Customer Master is intended to extend the enterprise reach to achieve a consistent, complete, accurate, and compliant view of customers. Siebel Universal Customer Master is planned to enable companies to better maximize their enterprise customer investments by collecting, storing, managing, and distributing high-quality customer data from a mastering application to each customer touch point across the organization. The flexibility and extensibility of UCM is intended to enable enterprises to define the depth and breadth of the information captured about their customers, partners, employees, and other parties.

Siebel 8.0 is expected to build upon the existing rich functionalities in Siebel Universal Customer Master to include planned new features and enhancements in several areas:

- **Privacy Management**—Customer data privacy management is on the top of the CIO and CPO agenda and Siebel 8.0 is expected to include a new capability that provides both the technology and the processes to enable companies to implement privacy best practices more easily and faster. Privacy Management is planned to include pre-modeled common business processes to handle the customer lifecycle events that trigger privacy preferences updates and require privacy noticing such as an address change, a new account contact addition, or an account type change. By using the new Siebel Business Rules Engine, Privacy Management introduces a set of privacy rules for a company to jumpstart or to improve its efforts to author, maintain, deploy, and audit privacy policies to respond to the complex compliance requirements.
- **Hierarchy Management**—As the holder of trusted customer and company information within the enterprise, UCM has comprehensive data model and services to facilitate the definition, maintenance, consolidation, and distribution of hierarchies across the entire enterprise. Siebel Universal Customer Master 8.0 has improved capabilities planned to facilitate hierarchy operations such as versioning, updating, and merging multiple hierarchies.
- **New Web Services**—In Siebel Universal Customer Master 8.0, Oracle plans to introduce additional new services based on the Siebel Services Oriented Architecture framework.

These planned new services are intended to provide a flexible and extensible interface for other applications to access and manipulate the data and business logic in the master application. With more companies supporting standards and moving quickly to SOA solutions, the new UCM Web Services are intended to be an important feature for the overall enterprise effort to achieve a single view of customers.

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Siebel Mobile Solutions

Siebel 8.0 is planned to include a number of new and enhanced features in the Siebel Handheld, Siebel Remote, and Siebel Wireless platforms, which are intended to increase application usability and user efficiency, strengthen security, and improve synchronization scalability and manageability.

Siebel Handheld

Planned new or improved features are expected to be introduced into a number of areas of the Siebel Handheld applications in Siebel 8.0, including the user interface, synchronization, security, and application extensibility.

User Interface. Siebel 8.0 is expected to introduce a number of new user interface controls intended to enhance application usability and to simplify data entry tasks. These planned controls include an alpha tab, radio buttons, a tree explorer, child-tabbed applets, and multi-value groups (MVG). These controls are intended to be used in all Siebel Handheld applications to provide a more usable and efficient user interface.

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Additionally, Siebel 8.0 is expected to introduce a new form-based view type. A form-based view provides a flexible grid-based user interface that does not impart constraints on parameters such as the location of fields or the underlying business components. Form-based views can therefore be configured to map closely the supported business process, providing a more familiar and efficient interface and reducing navigation through multiple views.

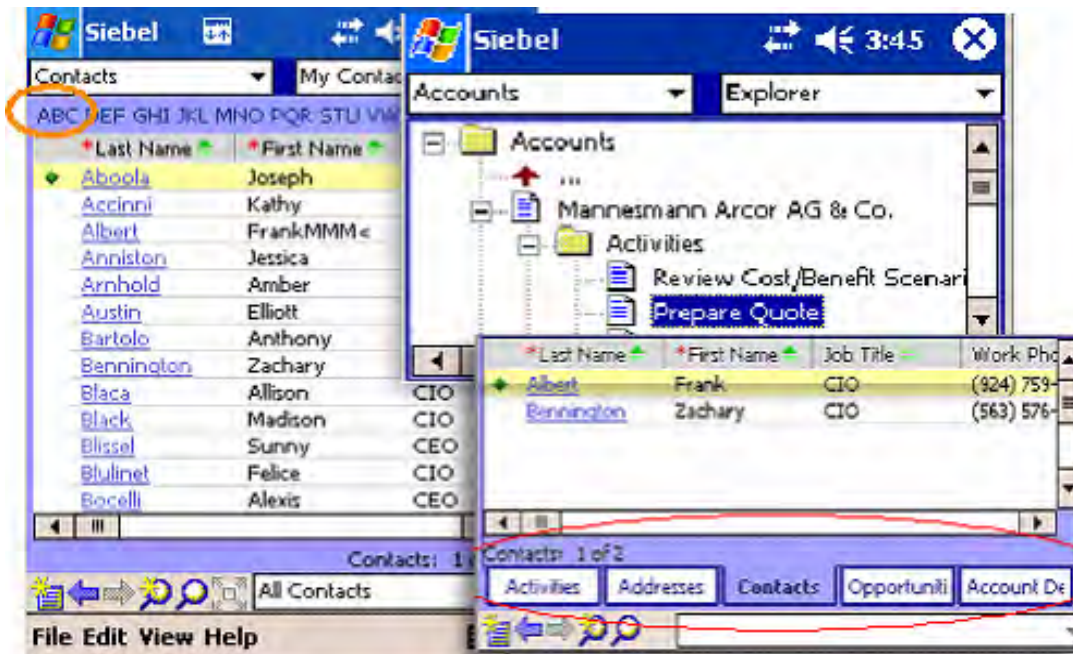


Figure 5: The Siebel Handheld 8.0 User Interface with planned new alpha, explorer, and child tab view support.

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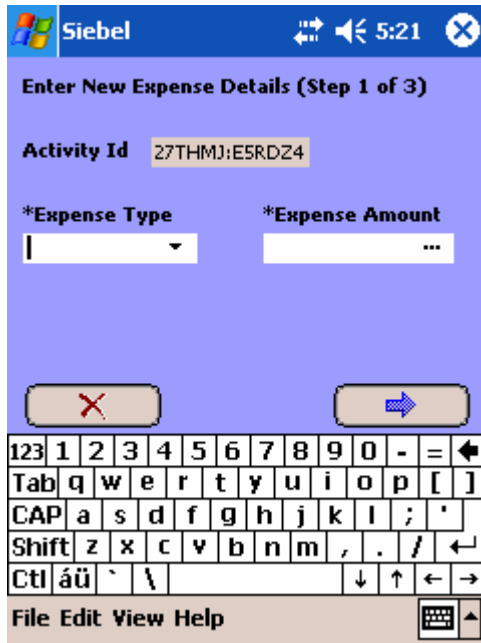


Figure 6: Planned Siebel 8.0 Task Based UI shown in Siebel Handheld.

Bar Code Enhancement. With Siebel 8.0, Oracle plans to introduce configuration flexibility that would allow handheld users to scan a barcode to find a record from a list and update the values using a single scan. This reduces the number of clicks required to find and update records when using the Bar Code Scanning capabilities. Using this new configuration flexibility, customers are able to streamline the Retail Audit process in Consumer goods and Sample Drop and Inventory Count processes in Pharma.

Printing Enhancements. In Siebel 8.0, Siebel Handheld is expected to introduce many new printing and tagging enhancements namely:

- **Printer Setting Dialogue Box**—If configured into the application, prompts a printer setting dialog box to popup when printing is initiated. The printer dialog box allows a user to select printer settings such as printer type (for example, Canon, HP) or port (infrared, COM port).
- **Multi-Form, Multi-Quantity Printing**—Planned to allow multiple print templates be associated to an applet. If configured into the application, prompts user to select number of copies to print for each print template associated to the applet. User can select 0 (to not print that form) or specify more than 0 by clicking on arrow keys.
- **Print Formatting Tag Enhancements**—New tags are planned to be introduced and existing tags are scheduled to be enhanced to provide more flexibility in formatting print templates.

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- **Print Logic Tag Enhancements**—New tags are planned to be introduced and existing tags are scheduled to be enhanced to provide more flexibility in calculating and doing simple logic in the print templates.

Calendar Enhancement. With Siebel Handheld 8.0, Oracle plans to introduce a number of calendar applet enhancements. These planned enhancements include configuration flexibility to add dynamic color coding of activities displayed in Daily and Weekly views of the calendar, dynamic expression driven description, new user properties for controlling the showing and hiding of toolbar and status bar, showing selected toolbar buttons in the menu bar when the toolbar is hidden, and controlling the size of the time slots.

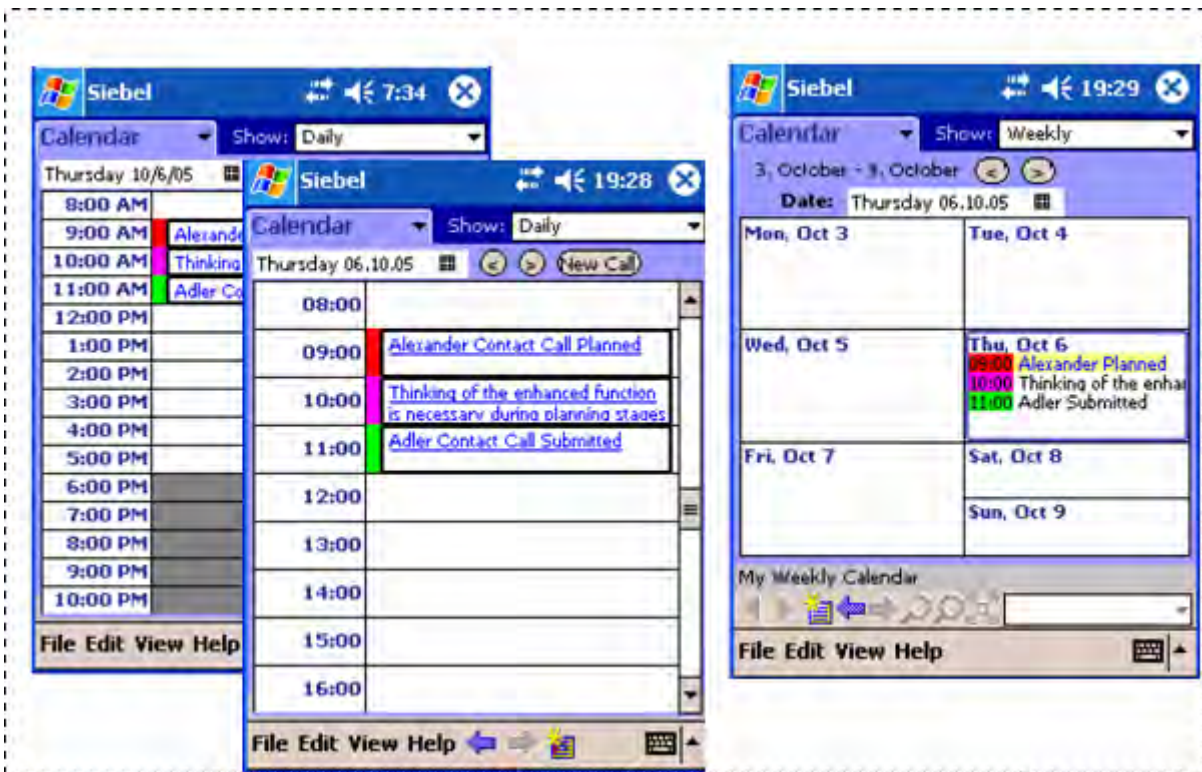


Figure 7: Planned Siebel Handheld 8.0 changes add dynamic color coding of activities displayed in Daily and Weekly views of the calendar

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Siebel Handheld Synchronization. With Siebel 8.0, Oracle plans to introduce a number of enhancements to give administrators new support for file distribution, greater control of performance through load balancing, control of batch synchronizations, and enhanced upgrade support.

Oracle plans with Siebel 8.0 to introduce support for transferring file attachments to Siebel Handheld devices, allowing transparent distribution of files linked to Siebel data, such as the sales presentation that accompanies the rollout of a new product. The files to be distributed may be segmented based on user responsibility, and administrators can also control the number files that are replicated. These capabilities are intended to provide finely grained control over file distribution to avoid overloading users' devices. Files are transferred during the Siebel Handheld synchronization session, avoiding the need for additional synchronizations and attendant user impact.

With Siebel Handheld 8.0, Oracle plans to support dynamic load-balancing of user synchronization sessions across multiple Siebel Servers with Siebel Handheld, using the same load balancer used for other Siebel Business Applications components. Dynamic load balancing removes the administrative overhead previously required to maintain static distribution of assigned users to servers for synchronization purposes. Under the previous static load-balancing model, a given server could be easily overloaded if many of the assigned users synchronized simultaneously. In that situation, none of those users would be able to synchronize if the server was unavailable. The dynamic load balancing in Siebel Handheld is intended to scale simultaneous synchronization sessions across all available servers, providing optimal resource utilization and helping to make sure that users can synchronize regardless of the state of any individual server.

With Siebel Handheld 8.0, Oracle also plans to provide new options for the execution of batch synchronization, allowing users to run just those steps needed to meet their immediate needs. As determined by the Siebel Administrator, it is planned that at synchronization time the user will be presented with a list of options that might include Upload Only, Download Only, Upload Now, Download Later (which can run the server-side batch processing once the upload is complete, shortening the time for the subsequent download session), and Full Sync. One option might also be set as the default so that users can press the Start button to complete their usual synchronization session.

With Siebel Handheld 8.0 there are also planned improvements in the process of upgrading from prior releases of Siebel Handheld applications, avoiding the need for system downtime when upgrading from 7.5.3 or later versions to Siebel 8.0. Siebel Handheld users are expected to be able to use their handheld applications while the Siebel Server environment is being upgraded to Siebel 8.0. The next synchronization session following the server-side upgrade will apply all of the user's outstanding transactions and then refresh the handheld device with the new application and a new data extract. This support is intended to significantly reduce the user impact of upgrading to Siebel Handheld 8.0.

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Security. For Siebel Handheld 8.0 it is planned to introduce some new features that provide additional control over access to Siebel data on the handheld device, complementing the device- and network-level security used by previous Siebel Handheld releases intended to better meet the needs of customers with stringent security requirements. The Siebel Handheld 8.0 application is expected to be able to be configured to require a password for access and implement a “lockout” after a specified number of incorrect entries. Additionally planned, the local database used by the Siebel Handheld application can be encrypted using up to a 128-bit key-based algorithm, preventing data access through an external means.

Handheld Application Extensibility. With Siebel Handheld 8.0, Oracle plans to provide a Microsoft COM-based interface to the Siebel Handheld application that is intended to be used to integrate Siebel applications with other handheld applications, or to modify or extend the Siebel Handheld application with custom code. The interface is expected to include both a set of events to which external applications or code can subscribe and a set of methods that they might invoke to manipulate the Siebel application. Interfaces are planned to be provided at the application, business component, business service, and applet levels for maximum flexibility.

Siebel Remote

In addition to planned new and improved security features, Siebel Remote 8.0 intends to support broader, more flexible, and secure deployments by introducing support for the Tablet PC platform and Store-and-Forward Wireless Messaging.

Enhanced Tablet PC Support. The Tablet PC is quickly becoming the device of choice for mobile enterprises. Siebel 8.0 is expected to be certified on the Tablet PC operating system and also to support enhanced text recognition. Additionally, Oracle plans to provide an Ink control that can be configured by customers to enable direct handwriting input to capture data such as signatures or handwritten notes.

Store-and-Forward Messaging. Plans for Siebel Remote 8.0 include introducing support for Store-and-Forward Messaging, which was introduced on the Siebel Handheld platform in a prior Siebel 7 release. Store-and-Forward Messaging provides the ability to “push” urgent messages, such as work orders or sales opportunities, to targeted Siebel Remote users through an always-on, guaranteed delivery mechanism. This feature is intended to ensure that high-priority messages are delivered to the Siebel Remote user without waiting for the user to initiate the next synchronization session, improving business agility, and the efficiency of field-based sales or service organizations. In addition, Store-and-Forward Messaging for Handheld is planned to support load-balanced and multiple queue managers to increase overall reliability and scalability.

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Security. With Siebel Remote 8.0 a number of new security features are planned that are intended to further safeguard Siebel data stored on the mobile laptop or Tablet PC. These features include strong encryption of the local database to prevent external access, new password policies that can enforce requirements, such as password expiration and the length and composition of password strings (as well as lockout after a defined number of invalid entries), and support for field-level encryption (including equality search on encrypted column) and audit trail.

Siebel Wireless

With Siebel Wireless, Oracle plans to provide real-time access to CRM data using a standard Web browser-equipped mobile phone, that increases field force productivity and effectiveness. Siebel Wireless is designed for the Openwave, Nokia, and PocketIE browsers and plans to support a broad variety of phones that use these browsers.

For Siebel 8.0 it is planned to extend support to several new browsers including Openwave Versions 6.x and 7.0 and Nokia Series 40 and 60. In addition, Siebel Wireless is intended to be able to be configured to display data in a two-column format on the PocketIE browser to reduce scrolling and improve usability.

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Enhanced Reliability, Scalability and Manageability

The costs involved and success realized in configuring, testing, deploying, and managing Siebel Business Applications are primary determinants of the time required to return business value from a deployment. It is expected that Siebel 8.0 will significantly improve the capabilities and maturity of the Siebel platform across multiple phases of the software lifecycle, reducing the time to value by streamlining the process for upgrading to Siebel 8.0, enhancing testing capabilities, automating the process for deploying configuration changes, and improving scalability and monitoring capabilities across the Siebel deployment.

Multilingual Upgrades

Siebel Business Applications are frequently deployed in multiple languages in order to best support geographically and linguistically diverse customer bases. In Siebel 8.0, the planned improvements to the upgrade process would make it significantly faster and easier to upgrade multilingual deployments by automating a number of steps that required manual execution in previous versions. It is expected that the Siebel Upgrader will automatically detect both the primary and additional languages used in the deployment and allow the administrator to select the active languages to be upgraded during the upgrade process. It is intended that the Siebel Upgrader could also automatically import the appropriate language versions of seed data, LOV/MLOV values, and repository strings, and provide simpler ways to resolve conflicts between existing string values and replacement values introduced by the upgrade for each language. As a final step, it is proposed that the Siebel Upgrader will allow upgrading all installed languages automatically. The planned automation of these steps would reduce the effort and chances for the introduction of risk during the upgrade of multilingual deployments.

IBM DB2 for z/OS Upgrade and Unicode Conversion

While the general upgrade procedure is common across Siebel-supported database platforms, the mechanism of performing the upgrade on IBM DB2 for z/OS is platform-specific. Siebel's IBM DB2 for z/OS upgrade technology is designed to accommodate zSeries customers' requirements of minimizing downtime for the database upgrade and meeting zSeries performance standards. Typically, zSeries customers use the mainframe solution for both development and production, and are fully versed in the native tools that accelerate data management on this platform. With Siebel 8.0 planned Development and Production upgrades on DB2 for z/OS, Oracle proposes to have the same look-and-feel across both environments, assuring developers that they are continually optimizing the upgrade process. In addition, it is expected that this platform-specific upgrade mechanism can rely on IBM

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utilities native to the platform, which is expected to further reduce production downtime by providing more efficient data processing and management that only IBM can provide. As part of this process, it is expected that the production upgrades can be refined to only include data migrations for the specific tables that have been modified compared to the source release, thus reducing data migration efforts and downtime. To further reduce downtime in a production upgrade, it is planned that non-intrusive changes will be able to be applied to the existing production schema in advance.

Many customers on IBM DB2 for z/OS will be looking forward to leveraging Unicode data encoding to expand their language support across many languages. For the Siebel 8.0 release, Oracle plans to provide Unicode support on DB2 for z/OS for all Siebel features using the UTF-16 encoding scheme. The database migration from a code page to Unicode is not included in the Siebel Database Server upgrade, but it is intended to be performed as a separate function directly on the mainframe. Continuing the path to use native tools on the mainframe, it is planned that the IBM DB2 Cross Loader can be employed for converting Siebel database from a code page to Unicode to ensure minimal impact to system downtime.

Siebel Test Express

Performing high-quality and thorough functional and performance testing is critical to the success of any deployment of Siebel Business Applications. Application problems—whether they arise from the configuration of the applications, the environment in which they are deployed, or the data against which they run—are significantly less expensive to fix and less costly to the business when identified and addressed outside the production environment.

Our experience has shown that using automation tools is the only way to perform this testing with the required thoroughness on a cost-effective and repeatable basis. This belief is borne out by customer experience; a survey of over 130 Siebel customers determined conclusively that customers who use test automation technology have much higher levels of satisfaction with Siebel applications than do customers who implement without test automation.

The Siebel 7.7 release introduced Siebel Test Automation, a single module that includes a set of features designed to reduce the cost and effort involved in testing Siebel with third-party automated functional and performance tools. These features include an open API that provides logical object references for test automation scripts, abstracting scripts away from the configuration of the user interface and reducing the amount of script maintenance required when the application configuration changes. The product also provides a direct mechanism for parameterizing data values to greatly simplify the creation of performance test scripts. The features introduced with the Siebel Test Automation module were a critical first step in reducing the cost and effort of automating Siebel testing.

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With Siebel 8.0, Oracle plans to introduce a second test module in the Siebel Test Automation suite, Siebel Test Express. It is expected that Siebel Test Express will provide robust test automation tools, supported integration access to the Siebel Repository to further streamline script creation and reduced script maintenance.

Streamlined Script Creation. The traditional approach to creating test scripts is to record them from a user session in the running application, capturing the names of all the objects accessed, the sequence in which they were used, and the data consumed and generated as a result. The downside of this approach includes the fact that it typically can only be executed late in the development cycle when the application configuration is nearly complete, which prevents testing from running in parallel with development, and this can extend the overall project timelines. In addition, the thoroughness of test coverage is entirely dependent on how much of the application was exercised during the recording session.

With Siebel Test Express 8.0, planned features allow test scripts to be created directly from the development environment, removing the need for manual recording sessions, and allowing test automation much earlier in the development cycle. It is proposed that Siebel Test Express 8.0 will allow third-party tools to build their repositories of objects to be tested by reading directly from the Siebel Repository. Siebel Test Express would then support the direct authoring of scripts that manipulate these objects, using IntelliSense-style drop-down lists, so that test development can start before the application is even running.

Reduced Script Maintenance. While using the interfaces provided by Siebel Test Automation can reduce the need to maintain and update scripts as the application configuration changes, in prior versions of Siebel Business Applications those changes had to be manually correlated between the Siebel Repository and the script repository. With Siebel Test Express 8.0, Oracle plans to provide greater integration between the two repositories, allowing changes to the Siebel configuration to be migrated to the script repository easily, with the aim of significantly reduce the amount of manual script maintenance required as a result of ongoing configuration changes.

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Application Deployment Framework

In any software project, deployment efforts are crucial to a successful rollout, and the costs of doing these steps appropriately can represent a substantial part of the project's budget. For Siebel deployments, once the configuration steps are complete, different teams need to deploy and roll out the customizations to different environments for testing. The deployment teams in charge of these activities very often face two issues—the first is the process in which the development team receives the customizations and documentation in a usable format, and the second is the process of physically performing the series of complex rollout tasks. Traditionally, this scenario translates to complex rollout tasks that require a high degree of coordination to ensure success. Without rigid coordination, and full understanding of all the tasks, the rollout is prone to a high error rate, unpredictable outcome, and potentially increased system downtime.

The new Application Deployment Framework builds on the Application Deployment Manager (ADM) functionality in previous releases by providing a unified ability to manage the rollout of different customized components. With Siebel 8.0, it is planned that ADM will include the following new features :

- Improved Packaging of Customizations Tools to facilitate the export and packaging of customization changes into re-usable packages:
 - ADM Administration tools to export database runtime customizations.
 - Siebel Tools enhancements to export repository objects.
 - Packaging utility to validate and seal a set of changes into a package.
- Automated Deployment/Activation and Recovery Unified means of deployment across data types via a new extensible metadata driven framework:
 - Consistent set of commands for deployment activities via a command line interface, hiding the underlying complexities for individual data types.
 - Reduced downtime by support for online deployment/activation for many data types.
 - Staging of deployment process, by category or server.
 - Backup/Restore support for items affected on target system.

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- Deployment status and history.
- Extensive Data Type Coverage.

It is planned that Siebel 8.0 will be able to deliver out-of-the-box support for over 70 data types residing in the Siebel Repository, Siebel runtime database, and customizable files.

Performance and Scalability Improvements

With Siebel 8.0, Oracle plans to include several enhancements to the Siebel Enterprise Server infrastructure that are expected to significantly improve the performance and scalability of Siebel Business Applications deployments. These planned enhancements could reduce the hardware resources required to support all sizes of deployment, in turn driving down the Total Cost of Ownership. In addition, these planned enhancements could also lift the scalability constraints at the database and application server tiers that prevent the expansion of larger deployments, across new user bases, and through new application interfaces.

Siebel Server Memory Management

With Siebel 8.0, Oracle plans to enhance the Siebel Server Shared Memory Management Infrastructure significantly. It is planned to reduce the shared memory footprint dramatically and to eliminate the limitation on the size of the deployment imposed by the shared memory size. This is extremely beneficial for deployment on large SMP servers. Furthermore, a major reduction is expected in the number of system calls involved in managing the shared memory. This should result in better CPU utilization and increased scalability, which is especially evident on multi-way servers.

Database Connection Pooling

With Siebel 8.0, Oracle plans to introduce a more sophisticated database connection pooling architecture that is expected to reduce the number of database connections needed to serve a given workload. The new Database Connection Pooling architecture is intended to eliminate the need to bind some types of database requests to a specific database connection, allowing end-user requests to use any available database connection—rather than wait for a specific connection to become available—and releasing that connection as soon as the request is completed to ensure maximum availability of the pool of database connections.

Improving the utilization of a pool of database connections both improves user response times and reduces the number of database connections required to provide acceptable performance. In internal testing, Oracle has been able to reduce the number of database connections by 20 to 40 percent while achieving equivalent or better performance than prior

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Siebel 7 releases. Reducing the number of database connections frees valuable database server resources, delivering better scalability with the same hardware and improving DBMS server TCO.

New Stateless Session Management

The Siebel 8.0 Application Object Manager has planned updates, to support an optional stateless operation mode that allows for improved system resource utilization. The planned reduction in memory utilization is expected to allow customers developing applications with the Siebel Web UI DDK to achieve significantly higher scalability levels than those achieved via the existing Application Object Manager. In addition, the planned enhanced stateless nature of the Application Object Manager means that user sessions might no longer be tied to a particular process, thus improving the overall system availability. If an Application Object Manager terminates abnormally or is accidentally decommissioned, it is planned that other Application Object Managers will be available to support the user and hence ensure a high level of service operation.

Enhanced File System Scalability

Oracle plans that Siebel 8.0 will allow administrators to partition the Siebel File System across multiple devices and nodes that allow the Siebel File System to handle multiple terabytes of data.

Efficient System Management

In Siebel 8.0 Oracle plans to provide a number of important application manageability enhancements to help ensure maximum uptime, optimize performance, and reduce the cost of ongoing operations for Siebel deployments.

Minimized Operational Downtime

Changing Siebel system parameters is a common administrative operation that can yield benefits, such as improving the throughput of the application to suit changing business needs. However, reinitializing Siebel Server processes in order for parameter changes to take affect can be a major cause of system downtime. In Siebel 8.0, it is planned that a number of system parameters, whose changes used to require the restart of the processes, will be able to be changed dynamically, with no downtime needed. This improvement is expected to apply to both the Siebel Server and the Siebel Web Server plug-in parameters. Customers are expected to achieve higher levels of system availability.

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Enhanced Application Instrumentation

Today, Siebel provides the fundamental framework for tracking the response times of a small, but important set of elements, such as workflow processing, and scripting. In Siebel 8.0, Oracle plans to extend instrumentation to all tasks processed by the Siebel 8.0 Application Object Manager. It is intended that the administrator can correlate events in a distributed environment, for example, end user actions might be tracked directly to Siebel Server processes, and also isolate the time spent on non-Siebel Server infrastructure.

With Siebel 8.0, it is planned that your DBA will be able to identify which users are running the most expensive queries through the addition of “user tags” on the SQL generated and logged by Siebel. It is expected that all of these capabilities might be run in a production system with under 5% impact to system resources.

the planned Siebel Application Response Management (SARM) component is expected to deliver a view of how much CPU and Memory is being used by an artifact and how many times the artifact is executed. It is expected that these features should allow the administrator to make informed, targeted decisions on what to processes to tune and what processes to ignore.

Siebel Diagnostic Console

The planned Siebel Diagnostic Console is a new Siebel 8.0 module that is intended to give Siebel Administrators a robust, centralized console through which they might closely monitor the health of the Siebel Business Applications deployment, automate its management and operation, and might quickly drill in to identify and correct the causes of performance or availability issues.

The Siebel Diagnostic Console is built on top of a new management framework that runs independently from the Siebel Server processes for maximum robustness and complete monitoring capabilities. It is planned that the Diagnostic Console would deliver the tools required for analyzing Siebel response time and error logs that provide deep operational insight and simplify problem identification and resolution.

It is anticipated that Siebel Administrators will find the Siebel Diagnostic Console a welcome addition to their overall systems management product portfolio.

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Siebel Configuration Manager

One of the leading causes of operational issues in Siebel Business Applications deployments is inconsistent configuration of the environment—the servers, operating systems, network interfaces, and third-party infrastructure products, such as databases and Web servers—on which Siebel applications run. Ensuring that all of these moving pieces have the required versions and settings can be difficult even in an environment with a few physical servers, and extremely difficult as those environments grow significantly in size and as additional such environments are needed to support development, test, and production deployments.

New in Siebel 8.0, the planned Siebel Configuration Manager is a tool that is intended to enable Siebel Administrators to take snapshots of their environments, make comparison between configurations, and verify the correctness of their Siebel configurations. This tool might be used to make sure that all servers in a given environment are configured alike, to compare working and non-working environments and quickly isolate the differences, and to ensure consistency between multiple environments, such as test and production. In addition, it is expected that the data captured by the tool might be used to expedite troubleshooting by Siebel Technical Support, further reducing time-to-problem resolution and improving application availability.

Improved Security

Oracle expects that Siebel 8.0 will improve on the world class security provided by prior versions by adding SSL encrypted communications between Siebel Server components across the entire infrastructure; LDAP and DB credentials are expected to be stored in a central, and highly available location; Active Directory is expected to be integrated for all Siebel supported operating systems.

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Extended Industry Specific Capability

The Siebel 8.0 release of Siebel Industry Applications is planned to introduce the next major evolution of Siebel's industry-leading CRM applications for specific industries, including Financial Services, Communications, Media and Energy, Life Sciences, High Technology and Industrial Manufacturing, and Public Sector. These industry specific, pre-built solutions are scheduled to contain best practices and business processes from Siebel's 11 years of CRM leadership across all 23 of Siebel's Industry Applications.

Further extending the capabilities outlined in this document for Siebel Business Applications, Siebel Industry Applications 8.0 is expected to include a broad set of new and improved features that solve the specific requirements of major industries. The following descriptions highlight the expected new and enhanced functionality included in Siebel Industry Applications 8.0. Additional base functionality supplied by Siebel Business Applications 8.0 that might be relevant to specific industry requirements are discussed in detail in other parts of this document. Please refer to the base functionality and platform highlights for additional information.

Siebel Communications, Media and Energy

The Siebel Communications, Media and Energy (CME) is a comprehensive suite of applications that enable telecommunications companies, media providers, and utilities to leverage information of their common customers to improve the business efficiency, collaboration, reduce costs and improve profitability. The Siebel CME 8.0 release introduces the next evolution of Siebel's CRM applications for communications, media and energy industries. The primary, enhancements to this vertical in Siebel 8.0 include planned improvements to Sales Forecasting, Search and Query enhancements, and new Customer Order Management capabilities outlined in earlier sections. Additionally, it is proposed that Siebel CME 8.0 will introduce important, new telephone-number management functionality that is critical to the normal operations of most communications companies.

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Telephone Number Management

Oracle plans that Siebel 8.0 will offer new functionality for managing telephone numbers, a fundamental requirement for most communications companies. A new Telephone Number Selection view allows the user to capture customers' number requirements, check number availability, and assign telephone numbers.

It is planned that the new view will also facilitate number portability by allowing numbers for in-porting to be captured. It is expected that telephone number management will also be supported in the new Task User Interface and included in the pre-built Wireless Order Management task.

Managing telephone numbers within the Siebel application present additional opportunities for business process optimization. It is planned that the need for switching between applications will be removed, steps may be automated and important end-to-end sales and service process may be further streamlined for efficiency and consistency.

Siebel Finance

Siebel Finance is a comprehensive suite of business applications that enables organizations in the finance industry to manage, synchronize and coordinate all customer touch points including the Internet, bank branch, call center, field organization and other distribution channels. It allows institutions or divisions in retail banking, corporate and investment banking, and wealth management to manage relationships and interactions in a customer-centric fashion. It is expected that Siebel Finance 8.0 will be the latest release in a highly successfully generation of solutions that enable banking customers worldwide to deploy multi-channel customer centric banking applications in a component based, service oriented framework.

The expected primary enhancements to this vertical in Siebel 8.0 include improvements to the business process, task and rules capabilities outlined in earlier sections. Additionally, in Siebel Finance 8.0 it is planned to use these process enhancements for superior account origination.

Streamlined Account Origination

Banks are continually challenged to stay ahead of the competition by bringing new and compelling offers to their clients. The continual change in product offerings makes it difficult for customers and banking officers to understand the best product for a given customer resulting in poor cross-selling efforts and reduced revenue. Siebel's account origination solution streamlines the process of recommending products and opening new accounts by allowing for customer needs to be gathered in a systematic and yet efficient manner and

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automatically recommending the best products and managing the application process.

Oracle plans that Siebel Finance 8.0 will extend the capabilities in prior Siebel releases with expected enhancements to the following components:

- **Product Recommendation.** Product recommendation is performed by a predictive analytics engine that combines the customer profile with the results of the dialog and recent activity to determine the best product match. Not only is the recommendation delivered in real-time, the system also learns from the results of past recommendations delivering the best recommendation for any given customer.
- **Product Bundling and Cross-Sell / Up-Sell.** Siebel Customer Order Management provides a comprehensive suite of applications that is intended to enable retail banks to cross-sell or up-sell packages of products that are priced and tailored based on the customer's relationship. For example, using Siebel Customer Order Management, a retail bank might define a product bundle that includes a mortgage, savings account and credit card with rates and fees tailored to the customer.
- **Underwriting.** The loan underwriting process is an area of application for Siebel's Business Rules Engine technology. For example, using the Siebel Business Rules Engine with appropriate underwriting rules, a call center agent or end user over the Web might enter underwriting criteria, such as applicant income, liability, down payment, credit score and so on and instantly view an approval decision.
- **Forms Generation.** Siebel Finance is expected to provide preconfigured Web Services-based integration with Adobe Forms Server 6.0 and Adobe Forms Designer software. This integration allows the generation of PDF forms based on data captured in the Siebel application. For example, a platform officer might capture all the application details and automatically generate a PDF form with the appropriate fields pre-populated.

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Siebel Insurance

Siebel Insurance is a comprehensive suite of applications that enables insurance companies to manage, synchronize and coordinate all customer interactions across multiple channels. Siebel Insurance provides the leading edge capabilities required to meet the needs of complex sales and service channels, captive and independent agencies, brokers, internal and external business partners, and field claims adjusters. Using Siebel Insurance, organizations can consolidate information from disparate back office systems, such as underwriting, policy, claims, and billing systems, to provide insurance professionals with a single view of customer portfolios so they better serve their customers and intelligently provide them with superior insurance products and services.

Siebel Insurance 8.0 plans to introduce the next evolution of Siebel's CRM applications for the insurance industry. Building upon the extensive new capabilities within Siebel Business Applications 8.0, Siebel Insurance is expected to dramatically expand its Claims offerings.

Siebel Claims

Siebel Claims is a comprehensive set of business applications that allows insurance organizations to create an enterprise-wide claims environment that can be simultaneously leveraged across all interaction channels and both internal and external constituencies. Siebel Claims is focused on ensuring cost effective claims while providing superior levels of customer satisfaction. As a result, organizations can significantly increase customer satisfaction and loyalty, gain competitive advantage, lower costs and maximize productivity. In Siebel Claims 8.0, Oracle plans to extend claims adjusting functionality to provide an end-to-end claims solution. The solution will enable carriers to seamlessly create First Notice of Loss, confirm coverage, establish claim reserves, select and assign internal and external claims adjusting tasks, monitor task completion, initiate claim payments, and handle fraud and recovery processes. Some of the expected enhancement and new capabilities that are offered in Siebel Claims 8.0 include:

Claims Event. It is planned that Siebel Claims 8.0 will allow users to associate a group of claims with one event. A typical example might be catastrophic weather-related events, such as a hurricane where more than one insured party could suffer property damage. In such cases, insurance companies might group all the claims related to the specific event. The claims event capability is expected to provide many benefits, such as maximizing the reuse of event related details, reducing data duplication, improving catastrophe tracking and reinsurance reporting while incorporating the statistics into a risk-rating processes.

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Multiple Party Roles. In some instances a single party can play multiple roles within the same claim. For instance, in the case of a cross-insured claim, a single party can both be the insured and the claimant or even a vendor—insured with their own policy while being a third-party claimant on the other party’s policy and a preferred vendor to the insurance organization. Currently, within Siebel only a single role can be assigned to a contact. In Siebel Claims 8.0, it is planned that a user will be able to associate multiple roles with a contact.

ISO Integration. With the expected Siebel Claims 8.0 integration with ISO, it is planned to send reported claims to the ISO ClaimSearch database and receive matched claim reports from this database. Many insurance organizations have manually intensive, non claims system integrated business processes around undertaking this important claim search activity. With this out-of-the-box integration, it is expected that Siebel Claims 8.0 will automate the process and boost productivity.

Field Adjuster Automatic Assignment. It is planned that Siebel Claims 8.0 will use the Siebel 8.0 field service functions to automate the field adjuster assignment. A user might assign a specific time slot for a service region and Siebel optimization engine will optimize the route and assign the right field adjuster, based upon skill set, geography, and availability.

Automatic Reserves and Coverages. When claims adjusters enter the summary code for the claim, it is planned that Siebel Claims 8.0 will automatically suggest appropriate claims coverage based on administrative setup. Once the coverages are opened, the user can automatically create the claim reserve records against each coverage. It is expected that Siebel Claims 8.0 will also provide the ability to associate multiple reserve records with a claims coverages record. Additionally, Siebel Claims will check the reserve authority of each adjuster and initiate the appropriate reserve approval processes if an adjuster does not have the appropriate reserve limit.

Payment & Invoices Details. Oracle plans that Siebel Claims 8.0 will provide functions to manage payment and invoices related to claim. For example, to make a claims payment, the user might navigate to the Claims Payment view and create a record and associate invoices. Once the payment amount is entered, the user can select the “generate payment” button to make the payment. The button will trigger logic in Siebel to compare the requested payment amount to the adjuster’s authorized payment limit. The payee is then checked against OFAC database, and the payment is compared to previous payments to assist in proactively alerting the user to any potential duplicate payment. It is expected that Siebel Claims 8.0 will also facilitate the payment approval routings if the payment exceeds the adjuster’s payment authority. In this case, the payment is automatically placed on hold and an approval request is generated and routed to the designated manager. When all approval conditions are met, the reserve amount is automatically decreased by the indemnity payment amount.

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Subrogation. It is planned that Siebel Claims 8.0 will enable the initiation and management of the claim subrogation recovery process. The user can flag the claim if there is a recovery potential. Once there is a recovery flag, Siebel Claims 8.0 can assign the claim to a recovery specialist who then manages subrogation activities specific to claims handling. The user can use the claim activities/ activity plan/ notes views to track the progress of the subrogation as well as use the document view to generate subrogation demand and negotiation documents. Finally, the user can use the claim recovery payment view to log and credit any payments that are received from a third party.

Fraud. With Siebel Claims 8.0, it is planned to provide pre-built processes to support consistent evaluation of claims for potential fraudulent claim activity, fraud specific investigation and handling. It is expected that Siebel Claims 8.0 will be able to be integrated with a third-party fraud modeling vendor that can identify the fraud potential in a claim. If a fraud condition exists, the fraud flag is checked and Siebel Claims can be used to assign the claim to the appropriate Special Investigation Unit resources. The SIU Specialist then uses Siebel Claims 8.0 to manage the fraud investigation and handling process. It is planned that the functions specified in the subrogation point, such as tracking fraud and generate fraud documentation will also be available for the fraud unit.

All of the planned enhancements and new functions specified above include data model improvements, user interface views and specialized business services to support the end to end claim process. Additionally, the Siebel Claims 8.0 is expected to include pre-built Application Services Interfaces (ASI) for claims, claims element and policy. Siebel ASI is planned to provide a release independent integration interface to and from Siebel application and it can be published as a Web service.

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Siebel Public Sector

It is expected that Siebel Public Sector 8.0 will represent a significant release for Oracle's comprehensive suite of case management applications. Oracle expects that Siebel Public Sector 8.0 will enable government agencies to provide world-class citizen service while delivering cost-efficient electronic, case management for investigations, social services, tax and revenues, homeland security, defense, and nonprofit agencies. For government agencies, it is planned that Siebel Public Sector 8.0 will represent the most comprehensive case management solution in the marketplace, enabling government agencies to measure and improve program performance on key performance indicators, such as employee productivity, case processing time and collaboration, benefits delivery, and investigations.

With Siebel Public Sector 8.0, Oracle plans to enable government agencies to provide world-class service to a complete range of constituents including citizens, businesses, nonprofits and other agencies and legislatures. Through an improved electronic case management system, case workers have a complete view into all relevant case information and are better able to manage complex case investigations by coordinating all agency activities, evidence management, lead management, incident management and suspect tracking. It is planned that Government agencies will be better able to manage revenue development and taxpayer collections through tools to easily track and accelerate sales, conduct and resolve audits and appeals, and better analyze trends and performance. Finally, it is proposed that agencies will also be able to improve immigration services by efficiently reporting incidents, creating and matching cases, better scheduling and managing citizenship application processes and effectively managing outreach and communications.

Siebel Case Management

With Siebel Public Sector 8.0, it is planned to provide new functionality to the industry leading case management solution that allows case workers to better coordinate and manage case investigations. Cases, leads and evidence can be stamped with a serial number from a combination of multiple fields such that the composite number is meaningful to an investigator's agency. A planned new Case Inbox increases the efficiency of the case approval process and reduces case backlog, because approvals can be routed quickly and efficiently without manual user intervention. These intended new features augment the Siebel Public Sector 8.0 abilities to seamlessly share information and leverage the capabilities of multiple organizations to detect and prevent criminal activities and threats to public welfare, manage case investigations electronically, and communicate rapidly across multiple channels, such as email, Web, phone, and fax.

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Case Serialization. With Case Serialization, it is planned to provide agencies with the ability to standardize case numbering across the organization by generating unique, custom-defined serial numbers for cases, as well as leads and evidence that are related to the case. When a case record is created in the Siebel database, a unique serial number is automatically generated and stamped on the record.

In many agencies, the case numbering system is a standard employed to track case files and all related material. Using Siebel Case Serialization, it is planned that administrators can set the case serial number to include a combination of multiple fields so that the composite number is meaningful to an investigator. For example, case serial numbers might be generated from a combination of fields unique to the case, and combined with either a local counter (based on the number of cases in the system), or a universal counter that numbers every record individually. When related records are created (such as leads or evidence that is related to the case), it is expected that serial numbers will automatically be created in the proper format, utilizing the unique numbering methodology defined by the organization.

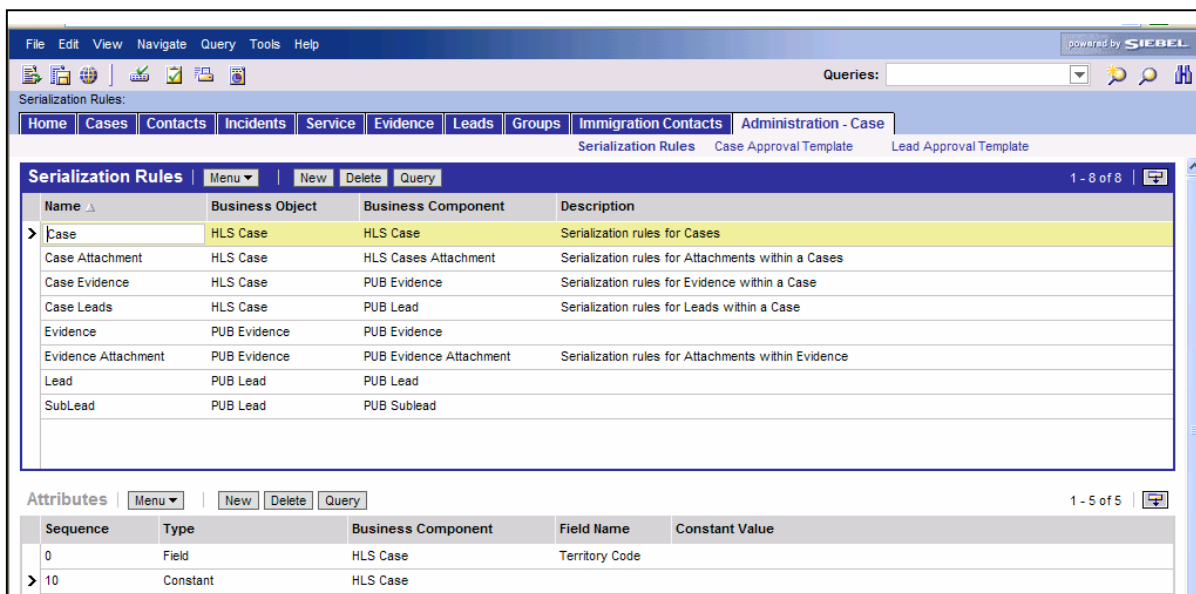


Figure 8: Siebel Case Serialization might allow agencies to generate a unique serial number that enables a single view of a case.

Additionally, it is planned that Siebel Case Serialization will serialize evidence, leads and attachments hierarchically as part of a case. Lead, evidence and attachment records in Siebel can inherit the serial number of the parent case and add a unique suffix to ensure that all records within a case are unique, yet share the same lineage.

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For interoperability with non-Siebel data, it is expected that case serial numbering can be accessed externally to Siebel using pre-built Web Services and extend an organization's standardized numbering methodology to case information in any system. Siebel Case Serializations might also regenerate case serial numbers for administrative purposes and cascade these changes to leads, evidence and attachments related to the selected case.

Universal Case Inbox. It is expected that the Siebel Universal Case Inbox can serve as a consolidated workspace for all cases and leads that have been automatically routed to appropriate personnel for approval. The Universal Case Inbox increases the efficiency of the case approval process and reduces case backlog, because approvals are routed quickly and efficiently without manual user intervention.

It is planned that the Universal Case Inbox will enable agencies to automatically route cases and leads for approval and provides a tiered hierarchy of approval. Cases are then automatically directed to obtain approvals from the specified management hierarchy. For example, a case created by an agent might be automatically routed to a supervisor, group manager, division manager, superintendent, commissioner, or anyone else who is designated in the approval chain.

For approvals, it is intended that the Universal Case Inbox will accommodate dotted line, or cross-department, approvers to model organizational complexity and sophisticated approval workflows. A case approver list can be established to obtain approvals from various people from different departments. For example, both the case supervisor and the finance manager might be designated to approve before a payment will be issued. Additionally, the Universal Siebel Case Inbox allows substitute or additional approvers to be added to a case as needed. A case agent might manually add an approver to the list in addition to the pre-defined approvers already in the system. Finally, it is planned that the Universal Case Inbox will prevent users from approving their own cases to ensure accountability.

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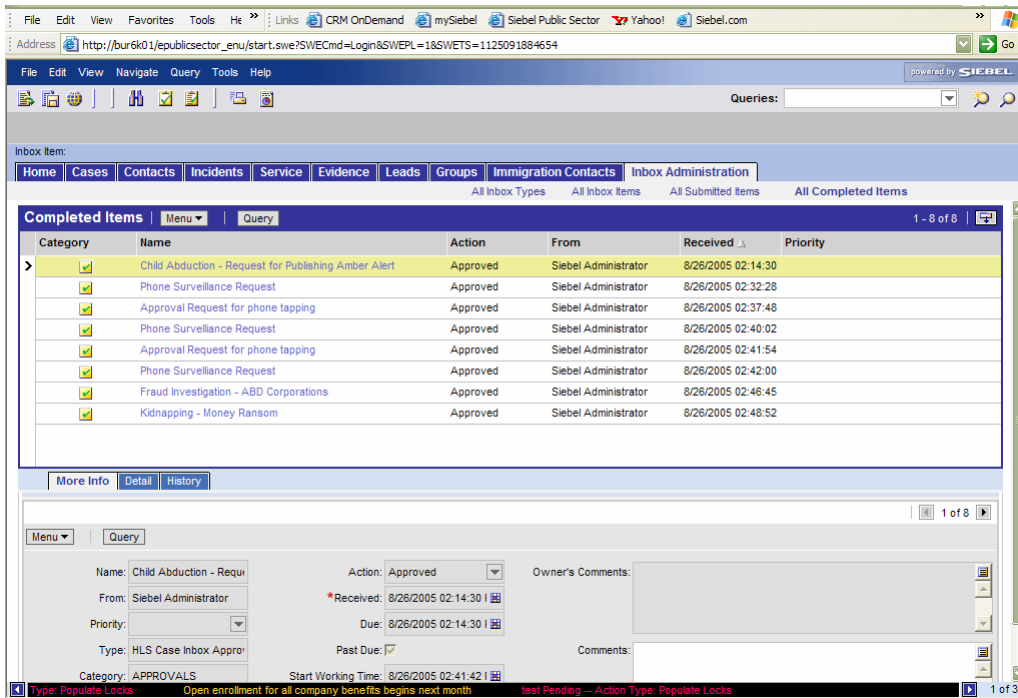


Figure 9: Planned Universal Case Inbox

Siebel Incident Management

Siebel Incident Management allows agencies to track, monitor, escalate, and resolve reported incidents. Currently, most agencies manage reported incidents through either paper-intensive manual processes or stand-alone, non-integrated systems. Procedures and processes for recording and routing incidents are inconsistent, time-consuming and error prone. Siebel Incident Management allows agencies to standardize the incident data capture process inside or across departments and ensure that incidents are resolved according to established departmental policies or regulatory requirements.

Incident Management. Siebel Incident Management planned enhancements in Siebel 8.0 provide the flexibility to track an individual across multiple incidents, even when this individual has a different role in the incident. Siebel Incident Management enables organizations to track offenders, victims, or witnesses seamlessly from incident to incident. This expected flexibility allows organizations to quickly gather the information required to understand the context of an incident, route it to the appropriate department or individual for a response, and ensure that the right course of action is pursued according to the specific policy and regulatory requirements of the agency.

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With Siebel Incident Management, it is planned to enable agencies to manage information related to individuals according to the context of an incident type and to capture relationships, if any, between individuals involved in the incident, such as the relationship between the victim and the offender, or if any injuries were suffered or inflicted during the incident. Additionally, in Siebel Incident Management it is planned that agencies can create a detailed profile of a potential offender whose real identity is not known. This subject profile might then be matched with the actual contact record once the identity is discovered.

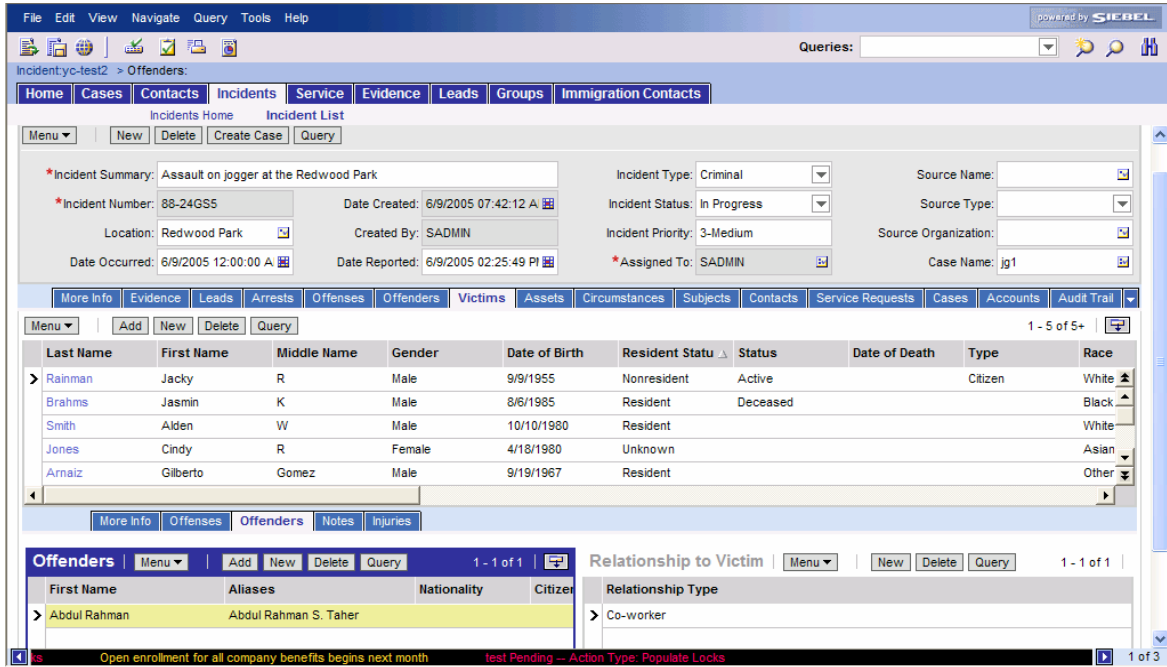


Figure 10: Siebel Incident Management is intended to allow users to designate contacts as victims or offenders within the context of the incident.

Offense Management. Siebel Offense Management is planned to provide organizations with the capability to track criminal offenses as part of a comprehensive incident management system. Offenses can be logged as part of the incident and used for reporting purposes and further analysis. Data about the offenders, victims, force used, and assets can be captured quickly and easily. Users can follow up on the offense by adding notes or related documents to the record to provide a comprehensive picture of the offense. All of the necessary information for reporting, tracking and managing offenses are easy to enter and readily available to users.

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Siebel Offense Management capability enables agencies to track alleged offenders and associated offenses that arise as part of an incident and to record associated arrests, manage property, and file evidence. Agencies can capture the circumstances surrounding the incident of specific categories, such as Aggravated Assault or Murder, Justifiable Homicide, or Negligent Manslaughter with descriptive and structured information for ease in reporting and analyzing. Additionally, it is planned that Siebel Offense Management will allow agencies to track the use of drugs or alcohol related to the offense and record any use of force during the offense, including the use of any weapons.



Figure 11: Siebel Offense Management is intended to enable public agencies to manage criminal offenses and offenders as part of a reported incident.

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Location Tracking. In Siebel Location Tracking, it is planned to enable organizations to standardize locations that have multiple addresses and to specify an area where there may not be precise address information. The ability to assign more specific location information without needing addresses makes it easier to classify and capture important information about an area. Siebel Location Tracking supports the association of multiple addresses to a single, specific Location, as well as other precise location information such as latitude/ longitude pairs or Universal Transverse Mercator (UTM). This planned feature provides organizations with a variety of different address formats to use when describing the location of an incident (for example, Central Park, corner of 5th and Main Streets, parking lot G). This combination of a specific location with a descriptive label helps agents to respond faster to developing incidents in addition to building a richer repository of data for use in later analysis. With Siebel Location Tracking, it is expected that organizations can capture and analyze related incidents or group incidents by location to augment the incident management capabilities of Siebel Public Sector 8.0.

With Siebel Location Tracking, it is also planned to enable agencies to standardize locations that have multiple addresses, such as malls, hotels, office parks or campuses and specify an area that lacks precise address information, such as an intersection, or the north end of a lake. These locations can also be entered in shorthand to simplify data-entry while ensuring consistent and accurate data capture.

Through Geographic Information System (GIS) integration, Siebel Location Tracking is expected to provide a graphical representation of the location and agencies can provide external mapping applications integrated to Siebel data stores with precise geo-coded location information for use in GIS analyses. For example, using the GIS integration with Siebel Location Tracking, government professionals might search for incidents reported within a two-mile radius of a highway construction project, or suspicious activity associated with a crime spree in a particular neighborhood.

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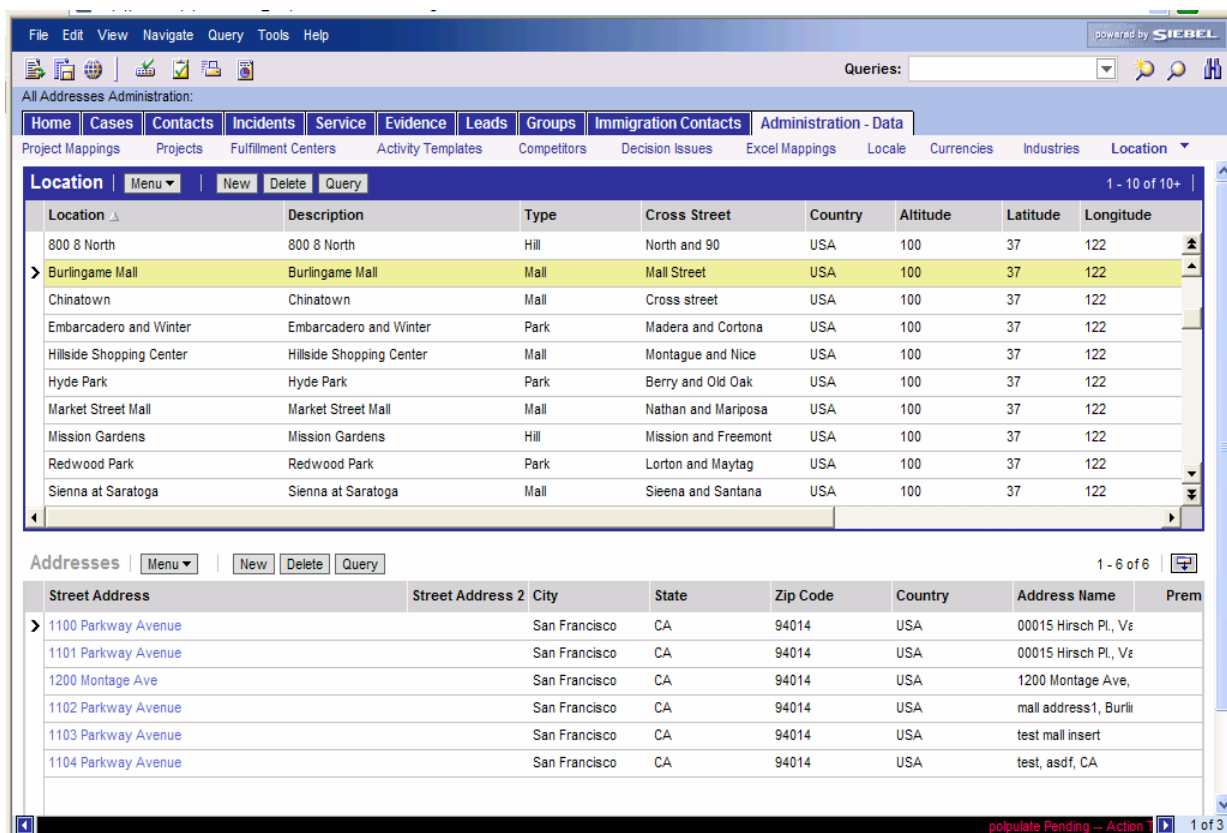


Figure 12: With Siebel Location Tracking, it is planned to enable agencies to define locations and associate multiple addresses with the location.

Siebel Evidence Management. With Siebel Evidence Management, it is planned to enable agencies to track and manage evidence associated with the cases they are managing. Siebel Evidence Management is intended to support a two-tier evidence model that enables agencies to track unique physical items in addition to managing these items as evidence in the context of one or more cases. For investigative cases, evidence collected at a crime scene (such as a weapon) might be logged as a unique asset in Siebel, and later converted to evidence in multiple cases. For each evidence record, it is intended that different activities and documents can be tracked, in accordance with the specific requirements of each case. For social services or benefits cases, a person’s identifying documents can serve as evidence in multiple cases across departments or programs. Siebel Evidence Management is planned to provide the capability to consolidate evidentiary items across an organization, yet still manage evidence in the context of each individual case.

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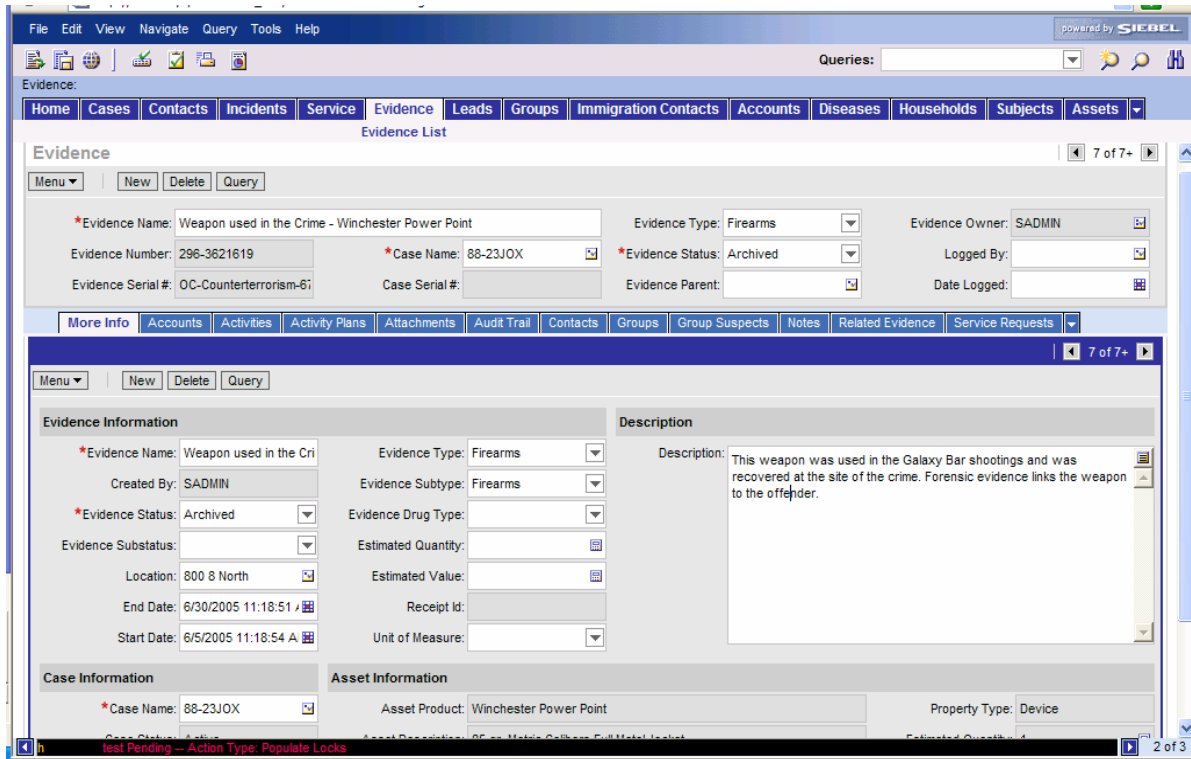


Figure 13: With Siebel Evidence Management it is planned to enable agencies to manage evidence associated with a case.

Siebel Evidence Management is also expected to enable agencies to manage the history of activities or actions specific to each case and each piece of evidence. This includes the ability to establish standardized handling instructions or activity templates that conform to agency requirements. Agencies might also link multiple evidence items with the same underlying asset, or relate evidence items within or between cases to establish key investigative linkages. It is planned that agencies can also establish start and end dates for each evidence item and serialize evidence as part of a case. For example, employment verification documents may be valid only for a specific year and records might be numbered according to the specific numbering methodology of an agency. Additionally, Siebel Evidence Management is expected to enable agencies to track various roles of individuals as they relate to each piece of evidence. Together, these planned new capabilities in Siebel Evidence Management provide agencies with a flexible repository of physical items that supports evidence in different cases and at the same time provide exceptional investigative insight.

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Siebel Investigative Lead Management. Siebel Investigative Lead Management are designed to help agencies track and manage clues and activities of interest across the enterprise. Siebel Investigative Lead Management is expected to enable leads to be quickly created as part of a case, assigned, worked and then routed to the appropriate agent for approval.

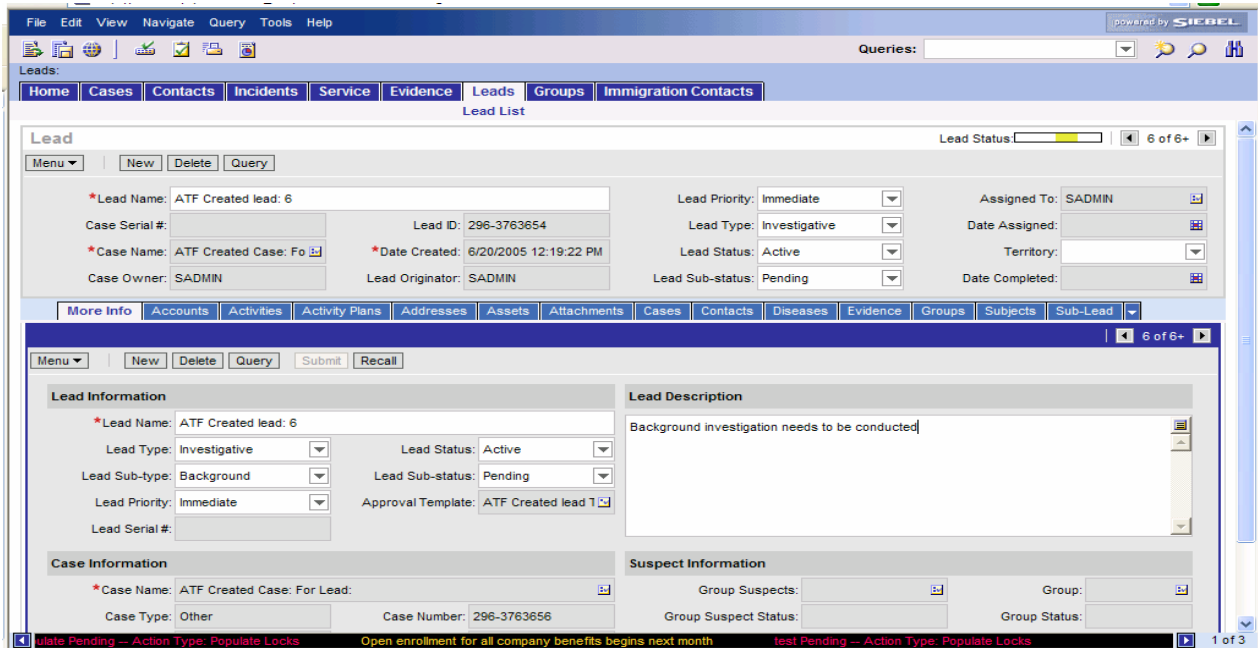


Figure 14: Siebel Investigative Lead Management is planned to enable agencies to track and manage leads as a part of each case record.

Siebel Investigative Lead Management is planned to enable agencies to track lead information as part of each case record, including when the lead was created, routed, covered, and submitted for approval. Once approved, leads can be routed automatically or manually. Agencies can also receive leads routed from other investigators or departments and manage them in a single queue.

Additionally, it is planned that agencies can relate all relevant investigative information to a lead, such as contacts, suspects, victims or other persons/groups of interest and view and compile evidence associated with a lead that is relevant to the case at hand. For standardization, it is expected that agencies can serialize leads as part of a case and lead records can be numbered according to the specific numbering methodology of a public agency. When viewing the lead, agencies can also see activities performed on a lead automatically in the context of the parent case.

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Accessibility Support

With Siebel Public Sector 8.0, Oracle plans to include enhanced support for accessibility and improved usability and reliability benefiting disabled people. Planned usability enhancements in Siebel Public Sector 8.0 include an improved navigational framework, and enhanced support for third-party screen reader technology, such as JAWS. A summary of these enhancements include:

Consistent Tab Order for Read-Only Fields. The data fields marked as read only are accessible using tab key and an option is available to configure the tab order.

Multiple Navigation Options in List Applets. In a list applet, users can navigate from column to column using the tab key. Alternatively, users can use hot keys to perform the same navigation.

In-line Data Editing in List Applets. The standard interactive framework is enhanced so that data displayed in a table format are editable in-line. Each field in the list applet is accessible by the tab key.

Faster Access to Drop Down Lists. Data in drop-down fields are accessible using the letter keys. For example, to select a Case Type of “Violent Crime,” a user can press the V key to quickly go to the first entry in the list that begins with the letter V.

Page Refresh Notification. A popup window notifies users when a page refresh is complete.

Keyboard Shortcuts. With Siebel 8.0, it is planned to introduce a number of keyboard shortcuts to enhance overall usability:

- **Number of Records**—Users can find out number of data rows returned by a user performed query or automatic page refresh activity by using a keyboard shortcut or by selecting the option, “Record Count” in the dropdown menu.
- **Multi-Value Groups (MVG) and Pop-up Applets**—Standard New, Query, Delete and Cancel function keyboard shortcuts are enabled for pop-up and MVG applets in HI mode.
- **Navigate within List Applet**—A keyboard shortcut accesses the next record and previous records displayed on the screen in list and form applets. The windows cursor moves along with the next and previous record selection in list applet.
- **iHelp**—Using keyboard shortcuts, it is planned that end users can open and close iHelp, and navigate between iHelp and application screens and views. In addition, users can scroll through the available iHelp tasks by using the tab key.

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Siebel Life Sciences

With Siebel Life Sciences 8.0, Oracle plans to introduce the next major evolution of Siebel's industry-leading CRM applications designed to support the pharmaceutical, medical and medical device industries. Siebel Life Sciences is a comprehensive suite of applications that enables companies to manage, synchronize and coordinate all customer interactions across multiple channels. Building upon the extensive new capabilities within Siebel Business Applications, it is expected that Siebel Life Sciences 8.0 will significantly extend the Siebel Clinical offerings to better enable companies to manage clinical trials more effectively.

Siebel Clinical

The Clinical enhancements, which are planned for delivery with Siebel Life Sciences 8.0, further expand the ability of companies to design and monitor the most common types of clinical trial studies. These enhancements are built in compliance with federal and international regulations and provide a configurable platform upon which more complex trials can be supported. These enhancements include:

Correspondence Tracking. It is planned that users can track all forms of communication exchanged within a site or across a Clinical Research Organization (CROs), Central Laboratories, and other business partners. This is accomplished by creating activities for every time a communication exchange occurs. The activity record stores all relevant information, such as date, status, employees, and completion date.

Team Assignment Enhancements. It is planned that adding a person to a protocol will also add the person to all regions and sites under the protocol. In addition, removing a person from a site will prompt users to determine whether this person should also be removed from all associated sites as well.

Study Team Assignment History. It is expected that users can track by date the assignment of researchers and other key personnel to a clinical trial and grant the proper rights based on these effective dates.

Trip Report Enhancements. It is planned that all trip report data will be stored under the corresponding trip report. Once the report is approved, the report data is locked and will continue to be displayed even if the associated contact or account data is removed from the database.

Case Report Form Tracking. It is expected that users can create and track Case Report Forms (CRFs) as part of a protocol site. Relevant information, such as whether the CRFs are source verified, retrieved from a site, in-house, or by a data management process, is captured for each CRF record within a site. Additional enhancements make CRF tracking pervasive throughout the entire Clinical module.

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Territory Management

In addition to the overall Territory Management enhancements described in an earlier section, Siebel Territory Management 8.0 is expected to include additional features especially designed for specifically Life Sciences customers:

Enhanced Transfer of Representative-Specific Information. It is planned that users can now specify which territories can be used as the source of representative-specific information during territory realignments. For example, in a situation where two sales representatives covering the same physician are replaced with a single new representative, administrators can determine from which of the two original employees the incoming salesperson should inherit attributes, such as representative specialty, primary address, and other representative-specific information.

Enhancements for the Japanese Market

The Japanese pharmaceutical market has unique characteristics that influence how pharmaceutical companies conduct their business across all levels in the organization. For sales representatives, this dictates how they should engage with physicians and hospitals in their territories, what information needs to be displayed, and how to plan for future calls.

The planned enhancements with this release address the distinctive traits of this market and facilitate the deployment of the Siebel Life Sciences solution. These enhancements include:

- **Hospital-Doctor Relationships**—It is planned that users can now visualize account-contact affiliations as a single record within a list applet. This feature provides an intuitive interface for representatives to retrieve customer information, create target lists, and plan for their future calls.
- **Hospital Department Support**— It is planned that users can create departments within a hospital and affiliate physicians to them. Departments are also displayed as part of the unique hospital-doctor record.
- **Hospital-Doctor Targeting Information**—It is expected that targeting information, such as call frequency or product ranking, can be displayed for each hospital-doctor record. These attributes can be dynamically changed, allowing administrators to modify them as business needs change. Sales representatives can now plan their calls using targeting attributes as guiding parameters.
- **Weekly/Monthly Calendar with Call Planning Capabilities**—It is planned that sales representatives will have an intuitive, user-friendly interface where they can

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plan their calls. In a single view, sales representatives can visualize all the activities for their hospital-doctor targets within a period of time. They can also create new calls by simply double-clicking on the screen. On this interface, representatives can also enter basic call data, such as products detailed and samples dropped, and submit the call if no additional information is required.

- **Contact Call with Account Information**—The standard contact call view is expected to be enhanced to include account information. This planned feature allows sales representatives to capture detailed call data for a hospital-doctor record, such as promotional items dropped, or decision issues.

Siebel Marketing Compliance

Government regulation of pharmaceutical companies' marketing expenses for Health Care Providers (HCP) is on the rise. Recently, the American Medical Association (AMA) launched an educational campaign on "gifts to physicians." Additionally, the Pharmaceutical Research and Manufacturers of America (PhRMA) issued a new code on interactions with healthcare professionals, and the Department of Health and Human Services Office of Inspector General (HHS-OIG) published Compliance Program Guidance for Pharmaceutical Manufacturers. Additionally, state governments have enacted laws. One recent law is California SB 1765, which covers the marketing practices of pharmaceutical companies conducting business in California.

As a result of the expanding government regulation, it is critical for pharmaceutical companies to implement a cost-effective solution to collect, monitor, analyze, and report on accurate, complete, and meaningful HCP marketing expense information. And they must do so while ensuring compliance with constantly changing government regulations.

In achieving a cost-effective, compliant solution, pharmaceutical companies face a myriad of challenges, from process inefficiencies (manual entry, duplication), inability to re-use components, inaccurate and incomplete data, disparate systems, to lack of flexible analytics and reporting tools.

Siebel Marketing Compliance is designed to help pharmaceutical companies address these challenges in order to achieve a cost-effective and compliant solution. Siebel's solution is expected to allow pharmaceutical companies to establish a flexible and scalable architecture to collect, monitor, analyze, and report on marketing expenses. In Siebel 8.0, Siebel Marketing Compliance is expected to support the following processes:

- **Administration of state spending limits and position-based spending limits**—This planned feature enables compliance managers to establish spending limits by state and HCPs and by positions.

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- **Collection of marketing expenses from sales representatives via expense reporting**— This planned feature enables sales representatives to efficiently participate in marketing compliance while performing their regular daily routine, and so minimizing the duplication of work.
- **Collection of marketing expenses from marketing personnel via physician profile**— This planned feature enables marketing personnel to easily log one-off marketing expenses, which minimizes the duplication of work.
- **Allocation of marketing expenses**— This planned feature automates the complex process of allocating expenses to individual HCPs and states.
- **Web services-enabled components**— This planned feature enables re-use of components in custom application and enables integration of expense data with third-party applications.

Siebel Consumer Goods

With Siebel Consumer Goods 8.0, it is planned to provide a comprehensive suite of applications that enables manufacturers to manage relationships across the entire demand chain. Planned features include integrated marketing, sales, and customer service applications that are designed to manage the various complex interactions and relationships between brand owners, their partners, their customers, and end consumers.

Siebel Consumer Goods 8.0 is expected to enable companies to improve net sales through improved trade promotion effectiveness and trade fund efficiency with a focus on increasing the return on resources (product, promotions funds, people, and fixtures). Siebel Consumer Goods 8.0 is intended to strengthen the collaborative relationships with partners, customers and consumers, ensuring flawless execution from consumer marketing to trade marketing to retail execution. With Siebel Consumer Goods 8.0, Oracle plans to help companies increase consumer demand by increasing brand awareness, value, and equity by flawlessly designing, executing, and managing critical marketing initiatives.

Trade Promotion Volume and Fund Liability Phasing

In Siebel Trade Promotions 8.0 it is planned to include the ability to intelligently allocate planned volume and accrued fund liabilities at the Promoted Category level. Key account managers can create and assign phasing time periods to a promoted category and then automatically allocate the planned volume and fund liabilities across the time periods (for example, four weekly periods). Then as shipments are imported, the phased volume and fund liabilities can be automatically adjusted thereby ensuring the accounting accrual of fund liabilities matches the actual shipments. As a result, it is expected that fund liability

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recognition will be more accurate.

Platform Support

With Siebel 8.0, Oracle plans to provide a comprehensive suite of applications that enables customers to leverage their investments in leading technologies from partners (including HP, IBM, Microsoft and Sun) to deploy the most comprehensive multichannel CRM solution. Specifically, it is expected that Siebel 8.0 will enable companies to:

- Take advantage of the latest server technologies to provide increased performance and scalability with compelling returns on investment.
- Leverage the most recent versions of market-leading operating systems, databases, and Web servers to provide applications with improved security, easier administration, and greater flexibility.
- Deploy solutions that adhere to their existing IT infrastructure standards, reducing implementation and administration costs.
- Implement a global solution supporting multilingual data and localization to lower deployment and training costs.

With Siebel 8.0, it is planned to provide support for the operating systems, database platforms, languages, and clients listed in the following tables. Further platform-specific details, such as the required minimum maintenance levels for all platforms and third-party products will be specified by the *Siebel 8.0 System Requirements and Supported Platforms Guide*, published along with the release.

Siebel Enterprise Server Platforms

It is planned that Siebel Enterprise Servers will support the platforms specified in the following table.

Server Operating System	Version	Server Platform
HP-UX 11i	11.23	HP Integrity servers
IBM AIX 5L	5.3	IBM pSeries servers
Microsoft Windows	2003	Intel-compatible x86 based servers
Sun Solaris	10	SPARC V9 compatible servers
RedHat Enterprise	4.0	Intel-compatible x86 based servers
Novell SuSE Enterprise	9.0	Intel-compatible x86 based servers

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J2EE Application Servers

It is planned that Siebel Web UI DDK will support the Application Servers specified in the table below.

Application Server	Version
BEA WebLogic Server	9.0
IBM WebSphere Application Server	6.0

Siebel Web Server Platforms

It is planned that Siebel Web Servers will support the platforms specified in the table below.

Web Server Software	Operating System	Server Platform
HP Web Server Suite 2.0	HP-UX 11i (11.23)	HP Integrity servers
IBM HTTP Server 2.0.47	IBM AIX 5L 5.3	IBM pSeries
Microsoft IIS 6.0	Microsoft Windows 2003	Intel-compatible x86 based servers
Sun Java System Web Server 6.1 SP4	Sun Solaris 10	SPARC V9 compatible servers
Apache 2.0	Novell SuSE Enterprise 9.0	Intel-compatible x86 based servers

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Siebel Database Server Platforms

It is planned that Siebel Business Applications 8.0 will support a wide variety of relational database management systems and database operating systems.

Database	Version	Operating System
IBM DB2 Universal Database (UDB) Enterprise Server Edition/ Workgroup Server Edition	8.2	All DB2 UDB supported platforms
IBM DB2 Universal Database for z/OS	8	All supported IBM z/OS platforms
IBM DB2 Connect Enterprise Edition	8.2	Supported for DB2 for z/OS customers on the following platforms: <ul style="list-style-type: none"> ○ IBM AIX ○ Microsoft Windows ○ Sun Solaris
Microsoft SQL Server	2005	All supported Microsoft Windows platforms
Oracle Database 10g Enterprise Edition	10 R2	All Oracle supported platforms, except z/OS

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High Interactivity-Mode Clients

The Siebel 8.0 Smart Web Architecture is expected to support a high interactivity (HI) deployment mode that will provide a powerful user interface delivered through a Web browser. HI mode will provide support for characteristics such as minimal screen refresh, implicit record commit, and optimal network utilization due to the separate retrieval of data and layout. HI mode relies on advanced browser capabilities, such as Document Object Model (DOM), Java, and ActiveX controls to deliver this functionality.

In general, HI mode is available only for Siebel “employee applications” such as Siebel Sales and Siebel Call Center that are used by internal employees of an enterprise. IT departments can generally ensure that internal employees are running browsers that support HI mode. A complete listing of employee applications will be provided in the *Siebel 8.0 System Requirements and Supported Platforms Guide*. The table below lists the planned supported Web browsers and client operating systems that support HI mode.

Client Operating System	Browser	
	Internet Explorer 6.0	Internet Explorer 7.0
Microsoft Windows 2000	X	
Microsoft Windows XP Professional	X	
Microsoft Windows XP Tablet PC Edition	X	

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Standard Interactivity-Mode Clients

The Siebel 8.0 Smart Web Architecture is planned to support a standard interactivity (SI) mode that provides a user experience associated with traditional Web applications. The client technology used for the standard interactivity deployment is widely available browser technology, including HTML and JavaScript.

In general, SI mode is available only for Siebel “customer facing” Internet applications—such as Siebel eService and Siebel Partner Relationship Management—that are used by customers or partners of an organization. The browsers running within this larger user community generally cannot be controlled easily. Oracle’s Siebel is committed to offering access to its SI-mode applications on standard browsers from common customer desktop operating systems. A complete listing of customer applications will be provided in the Siebel 8.0 *System Requirements and Supported Platforms Guide*. The table below lists the planned Web browsers and client operating systems that support SI mode.

Browser	O/S				
	Microsoft Windows XP SP2	Microsoft Windows 2000 with Service Pack 4 or above	Apple Mac OS X 10.4.3 Client	SuSe Linux Desktop 9 SP3	RedHat Linux 4 Desktop Workstation
IE 7					
IE 6	x	x			
IE 5.5		x			
Netscape 8.1	x				
Safari 2.0.1			x		
Mozilla Firefox 1.5.0.1	x	x	x	x	x

Note: Microsoft Vista will not be generally available at time of shipment of Siebel CRM 8, but will be certified once the new operating system is available.

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Standard Handheld Clients

Siebel Business Applications 8.0 is planned to support a wide variety of Handheld Clients and operating systems.

Devices	Operating System
PocketPC-based PDA devices with 64 MB RAM from HP, Dell, Symbol, and Intermec	PPC 2003 Windows Mobile 2003 Second Edition Windows Mobile 2003 Phone Edition Windows Mobile 2003 Phone Edition Second Edition Windows Mobile 5

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Language Support

Oracle translates user interface elements, such as field labels, view bars, screen bars, menu items, error messages, and dialog box text into multiple languages. The following languages are planned for Oracle's Siebel 8.0:

- Arabic
- Chinese (Simplified)
- Chinese (Traditional)
- Czech
- English (American)
- Danish
- Dutch
- French
- Finnish
- German
- Hebrew
- Italian
- Japanese
- Korean
- Portuguese (Brazil)
- Portuguese (European)
- Spanish (Modern)
- Swedish
- Thai

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