



COLLABORATE17

TECHNOLOGY AND APPLICATIONS FORUM
FOR THE ORACLE COMMUNITY

Insperity's On-Premise CRM (Siebel) & Oracle Service Cloud (Right Now) Integration

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(IOUG) OAUG Quest

#C17LV

Introduction

Aashish Mahodaya

Manager, Oracle CRM & Analytics, Technology - Business Applications

Leading CRM/Business Intelligence Team; Providing strategic vision for CRM and Analytics solutions for Insperity needs.

Managing team responsible for designing information architecture and delivery solutions using various Oracle CRM and Analytics technologies.



Agenda

- Insperity Inc. , Company background
- OneVoice, CRM Application – Footprints, Architecture
- CRM Application usage, User Group
- CRM Application Case Study
- Service Cloud – Siebel Integration
- Right Now – OneVoice Integration Components
- Right Now – OneVoice Workflow
- DotNetBrowser Use Case & Issues
- Usability Issues /Challenges
- Proposed Solution
- What's next CRM, Service Cloud

Full-Service HR

Get access to better benefits for your employees, stress-free payroll and administrative relief with our Workforce Optimization® full-service HR.

Small Business

5 to 149 employees



Mid-Large Business

150 to 5,000 employees



Individual Solutions

Streamline your approach to many of your most challenging business management tasks with our individual products and services.



Employment Screening



Financial Solutions



Insurance Services



Organizational Planning



Performance Management



Retirement Services



Expense Management



Human Capital Management



MidMarket Solutions



Payroll Software



Recruiting Services



Time and Attendance

Insperity CRM/BI business process related to solutions -

Services Solutions

- Payroll Services
- Recruiting Service
- Employment Screening
- Retirement Services
- Insurance Services

Product Solutions

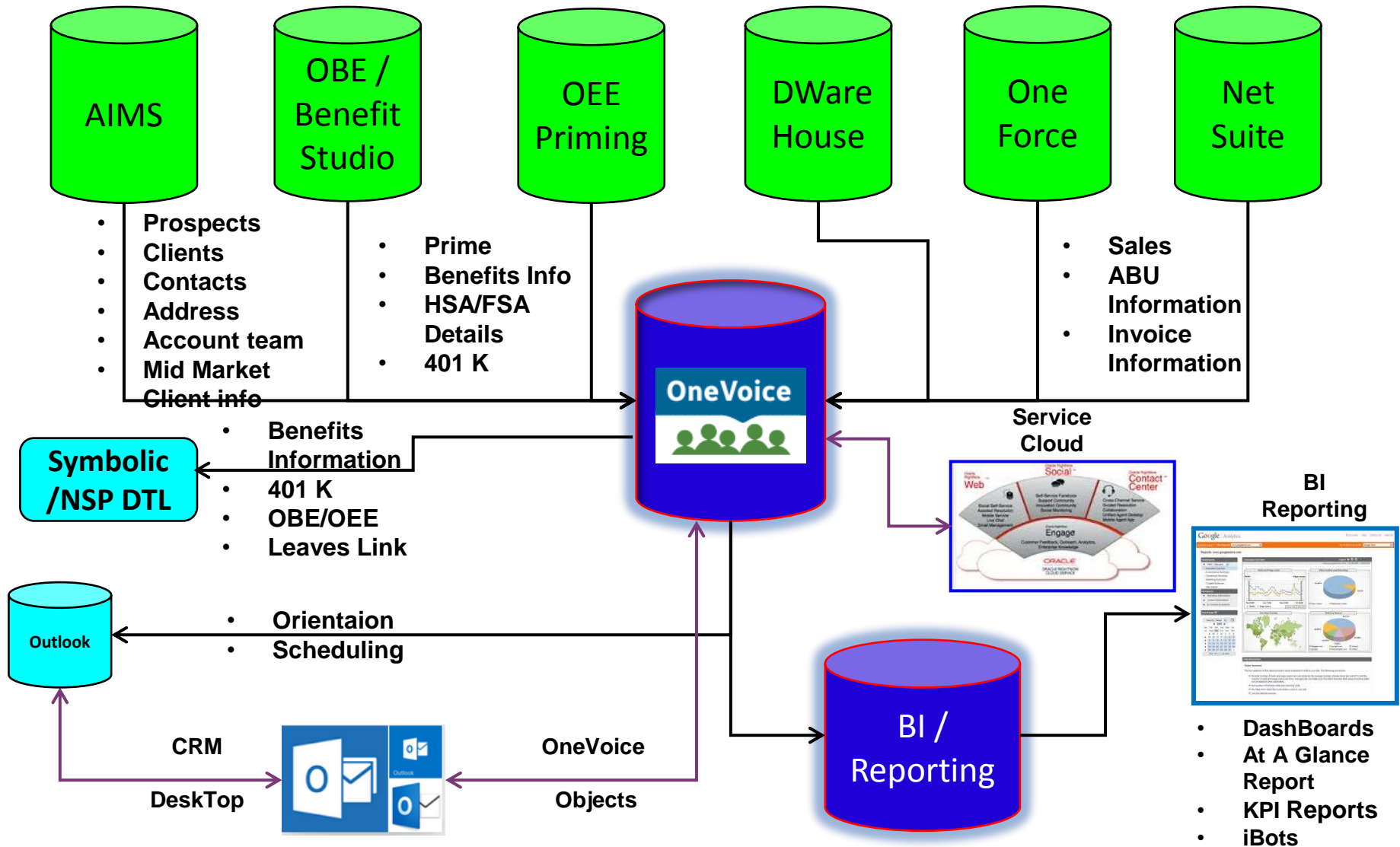
- Performance Management
- Organizational Planning
- Expense Management
- Time & Attendance
- Human Capital Management
- Financial Management

Insperity

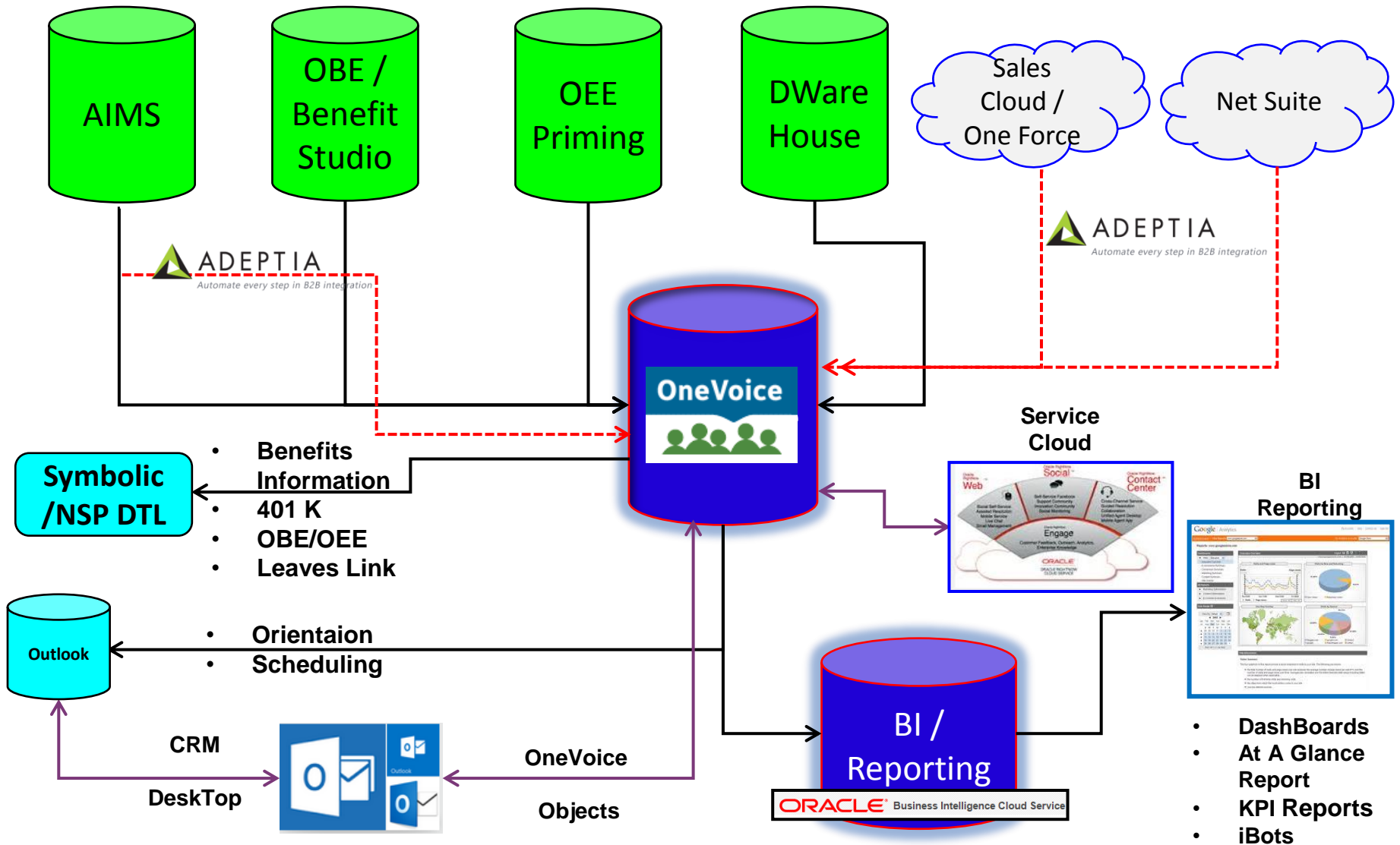
OneVoice - CRM/BI Footprints

- Insperity is currently running Siebel On Premise CRM version IP2014 (PS16)
 - For approximately 1,400 users
 - Core Siebel modules include CRM Base, Call Center, Email Response, and Field Service
- Oracle Service Cloud /Right Now – November'2016 Release
 - Chat
 - Co-browse
- Insperity is currently running OBIA 7.9.6.4 and OBIEE 12c (BIFS)
- Business Intelligence Cloud Service(BICS)
 - Visual Analyzer (VA)
 - DV DeskTop (Data Visualization Desk Top)
- Oracle Siebel On-Demand (Sales Cloud)

OneVoice CRM Architecture (Current)



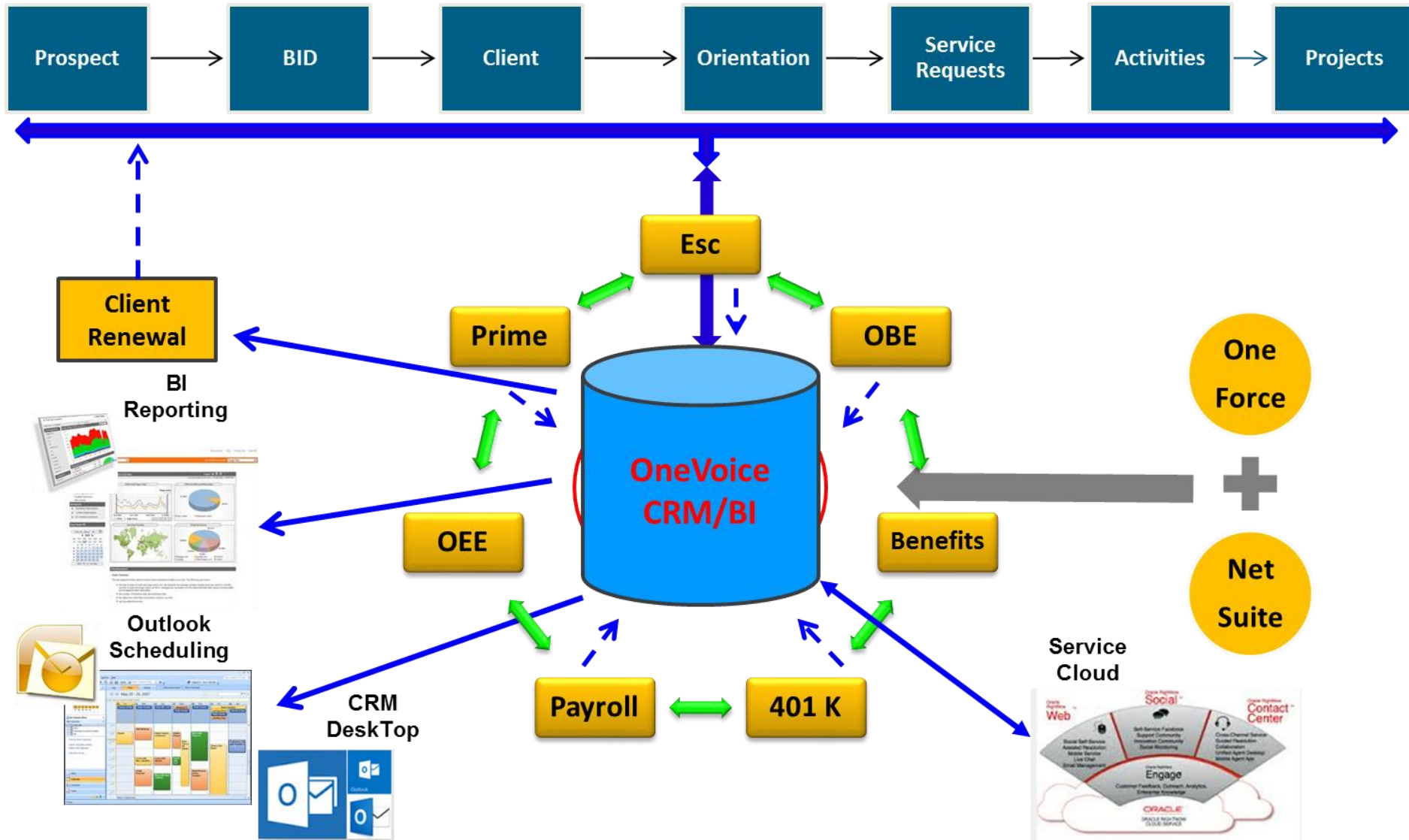
OneVoice CRM Architecture (Future)



CRM/BI Application User Groups

- Field Service Operations
- Account Teams
- Contact Center Users
- Manager, HR Services
- Client Liaisons
- Account Executives
- HR Specialists
- Performance Specialists
- Team Coordinators
- Payroll Specialists
- Payroll Supervisors
- Orientation Reps
- Safety Consultants
- Benefit Reps
- Health & Welfare
- Recruiting
- Renewals

Case Study – OneVoice (CRM/BI Process Flow)



OneVoice (CRM)/BI usage

- Efficiency in Service Operations
 - Enhance Contact Center/Service Center productivity and performance
 - Standardization & Automation of business processes
 - Increase customer service level, service capacity
 - Compliance
- Security controls to information
 - Read only access to Legacy Application(s) data
- Service Cloud (Right Now - Chat/Co-browse/e-Mail)
 - Multi Channel solution
 - Right Now – Siebel Integration
- BIP, real time CRM reporting
- BI /Analytics - Enterprise wide reporting solution (Service, Finance, Recruiting etc.)
 - Holistic view of Client and related information
- Business Intelligence Cloud Service (BICS - On-Premise/Cloud/Hybrid Reporting)
 - Self-service, Ad-hoc reporting tool for power user
- CRM DeskTop
 - Integration between Siebel & Outlook
 - Siebel Object in Outlook

Oracle Service Cloud (Chat / Co-browse) @ Insperity

- Users
 - Contact Center Users
 - Service Center
 - Field Service Agents
- Alternative for CTI Solution – Chat / Co-Browse
- OneVoice (CRM) Integration
 - Chat Transcripts, attachments
 - Incidents Transcripts, attachments
 - Data End Point for Service / Ticket details
- Esc (Employee Service Center Portal) Integration – Chat / Co-Browse Integration
- Contact Center Reporting

Right Now – OneVoice Integration Initial Approach

- Prime Requirement - Siebel (CRM system – OneVoice) to be integrated with Console.
- Oracle Service Cloud add-in has been developed for CRM to Service Cloud two way communication.
- Add-in allows real time communication for agents to see CRM data (customer/service request) while they are working on Tickets or Chats.
- DotNetBrowser control for multiple Session

Right Now – OneVoice Integration Components

- Oracle Service Cloud Add-in
 - Oracle Service Cloud agent desktop functionality can be extended using desktop add-in framework
 - Ability to add custom controls, components and applications within live agent desktop (application menu, status bar, workspace, and navigation panel)
- Oracle Service Cloud SOAP API
 - SOAP API is being used to update ticket information as well as to be able to error log information
- .NetBrowser Control
 - This custom control was introduced to help resolve issues with session sharing for Siebel web UI.
 - This custom component is added to Oracle Service Cloud Add-in which communicates to Siebel.
 - Out of the box .NET browser control within .NET 4.0 does not allow to specify not to merge session
- Siebel Integration using Web Services
 - Oracle Service Cloud add-in communicates to Siebel using web services /WSDLs

Siebel session invoked in Right Now Console

The screenshot displays the Oracle Service Cloud interface within a web browser window titled "inspertyrightnow - Oracle Service Cloud". The browser's address bar and toolbar are visible at the top. The main content area is divided into several sections:

- Recent Items:** A list of recent items on the left, including "150922-000210", "Test Test", "150922-000208", "Test Test", and "SPIKE FREEL:406".
- Summary:** A form on the left containing details for a service request:
 - Reference #: 150922-000210
 - SR #: 1-479335604
 - Specialist: Aashish Mah
 - Contact*: Test Test
 - Status*: Open
 - Queue: Benefits
 - Product: [No Value]
 - PER ID: 2467317
 - Resolved?: [No Value]
 - Created: 09/22/2015 10
 - Buttons: create/Update S, Closed
- Navigation:** A sidebar on the left with "Contacts" and "All Contacts" options.
- OneVoice Search Log:** A central window showing a search log for "All Service Requests". It includes a table with the following data:

| SR # | Area | Sub Area | Account | AIMS Client # | Summary |
|-------------|----------|----------|---------------|---------------|-----------|
| 1-479335604 | changeme | changeme | BRIDGER AD... | 3231800 | 2467317 - |
- Response:** A section at the bottom left for composing a response, with a "Response" field and a "CC ..." field.

The bottom status bar indicates "Logged in as: Aashish Mahodaya" and "Editing 2 objects".

Right Now – OV Workflow

- **On Workspace Load**

- When Incident workspace opens, check to see if Service Request ID & Person ID exists
- If SR# exists then
 - Call Siebel Web service and retrieve SR Row ID
 - Based on SR Row ID, load Siebel View for Service Request
 - DotNetBrowser will be loaded after web service call is complete with Siebel SR view.
- If SR# does not exist then check if Per ID# is available, if Per ID is available then
 - Call Siebel Web service and retrieve Per Row ID
 - Base on Per Row ID, load Siebel view for Person
 - DotNetBrowser will be loaded after web service call is complete with Siebel PER view
- If Per ID or SR ID do not exists then
 - DotNetBrowser will be loaded with Siebel home page URL
 - Agents will be able to manually search for specific person using Custom Search tab

Right Now – OV Workflow Continued...

- **On Create/Update SR**

- When Create/Update SR Button clicked/Save & Close
 - Call Siebel Web service to create /update SR
- When close existing ticket with out SR
 - Prompt to create SR
 - Add-in validate required fields to process SR request

- **Create/Update SR Error scenario**

- During Web Service error, log will be generated
- Log Event fire rule to inform distribute group
- Email sent out to distribution list
- Log Report in Analytics

Siebel Integration using Web Services

- Contact Search
- Service Request Search
- Create Service Request
- Update Service Request

Right Now – OV Integration points to consider

- Manageability
 - Patch /System Updates
 - Testing /Integration Testing (post patch/upgrade)
 - Minor Fixes /Development
- Future Technical Enhancements
 - SOAP Modifications
 - Restful Web Services
- Developments Methodologies
 - Dot Net Development
 - Web Service Development
- Integration Touch points
 - Sharing data with OV
 - OV is end point for all data like Chat transcript/SR/Attachments etc.

.NetBrowser – Use case & Issues

.NetBrowser Use Case

- For Insperity solution, we need to isolate the Siebel sessions
 - Something similar to “No Frame Merge” option of IE , which is based on Registry settings
- Out of the box .Net control does not allow “No Merge” option
- Custom control used to resolve issues with multi sessions

Issues

- Performance impact
 - Take a long time to load .Net custom control
- Instability of the plug in
 - Plug in crash issue
 - Object Reference error

Proposed solution - removing .Net Browser & overwriting same Siebel session based on Chat/Ticket history

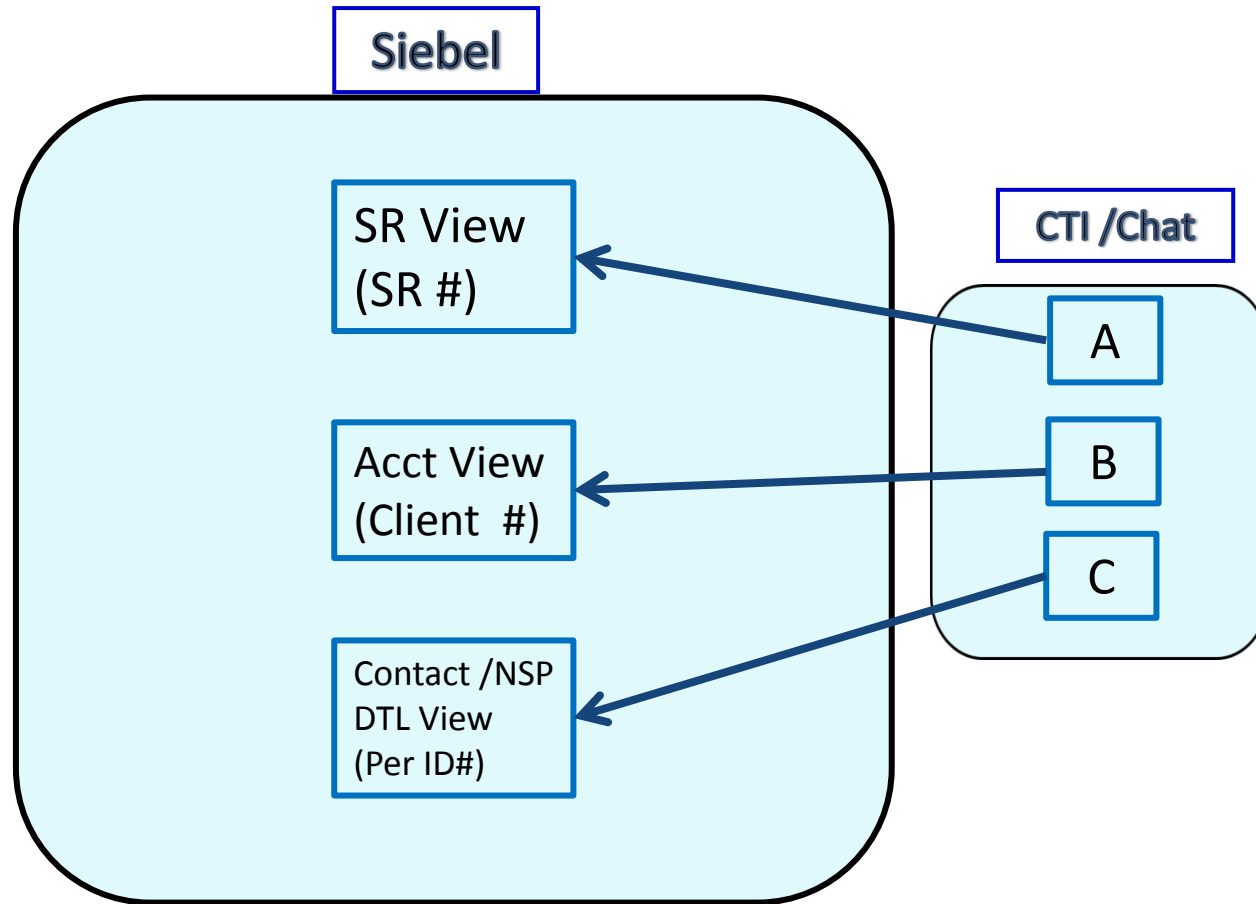
- Remove Dot Net Plug In
- Don't use multi session to invoke OneVoice (Siebel)
 - Use only ONE IE session in Workspace
- Overwrite IE sessions for multiple chats
 - Overwrite Siebel session based on multiple chats
 - Ticket / Incidents #s
 - Historical references
- Keep Historical reference of
 - Client # /Per Id / SR #
 - Incident #/Ticket #
 - Last traversed View in Siebel session (View Name, data set)
- Convert historical reference to web service/static url
 - Which Right Now code can invoke as per the Incident #/Chat #/Ticket # and other data set combination
 - Like CTI shortcut transfer/ call data set transfer
- Siebel session gets refreshed for each chat, based on last active / traversed view

Multiple Chats with different Siebel Sessions

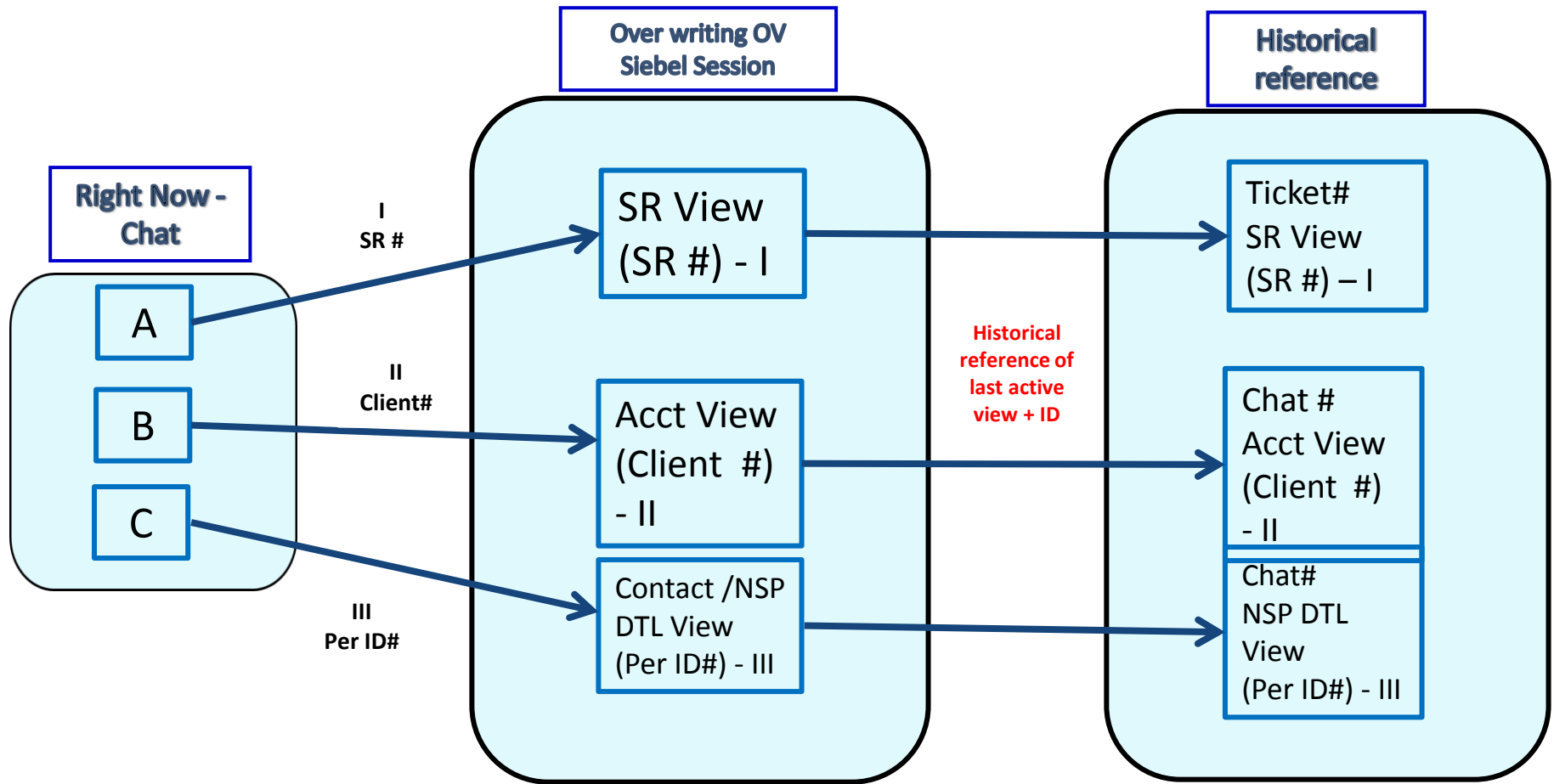
The image displays four screenshots of the Oracle Service Cloud OneVoice interface, illustrating multiple chat sessions. The top-left screenshot shows a list of chat sessions with IDs: 160301-00048, 160209-00033, 160209-00036, and 160301-00020. Colored arrows point from these IDs to detailed chat views on the right:

- 1st Chat:** A chat transcript from Monica Adams, dated 03/01/2016 09:26 AM. The transcript reads: "Thank you for contacting Inspecity. My name is Monica. How may I help you? 'DEIDREE BARIL' disconnected. (Concluded by End-user)." A red arrow points from the ID 160301-00048 to this chat.
- 2nd Chat:** A contact detail view for MARY STONER, a Receptionist at Brokerage Professionals, Inc. A blue arrow points from the ID 160209-00033 to this chat.
- 3rd Chat:** A contact detail view for STONER, MARY, also a Receptionist at Brokerage Professionals, Inc. A blue arrow points from the ID 160209-00036 to this chat.
- 4th Chat:** A contact detail view for JILL ADRIAN, a Surgeon at St. Peter's Bone and Joint Surgery. A green arrow points from the ID 160301-00020 to this chat.

Siebel – CTI Chat scenario

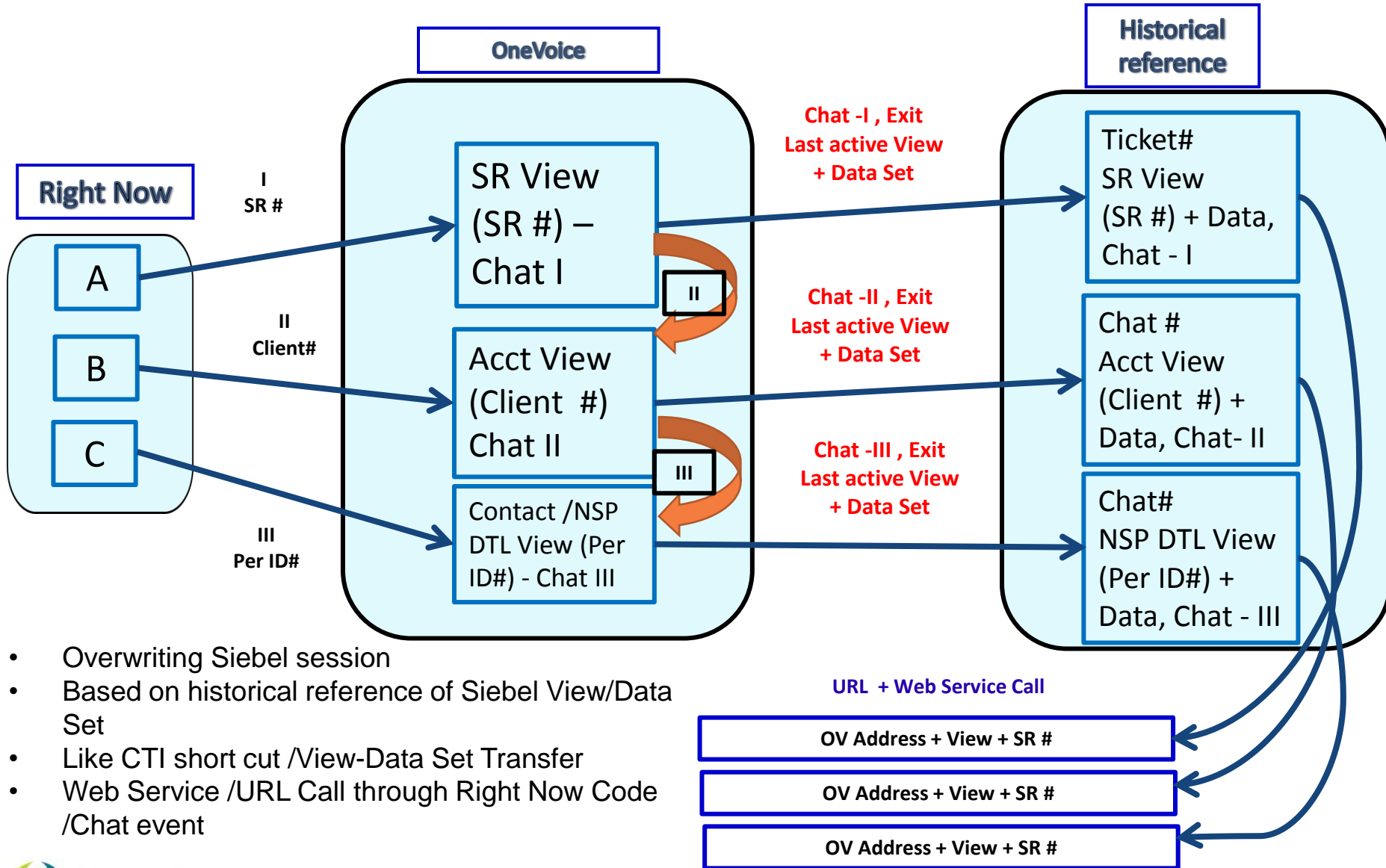


Right Now- Chat & Siebel session



- When moving from one chat to other chat window, capture chat & store data set
- Keep historical reference of Siebel View/Data Set
- Overwrite Siebel session based on last captured Data set

Right Now- Chat & Siebel session (Overwriting like CTI View Transfer)



- Overwriting Siebel session
- Based on historical reference of Siebel View/Data Set
- Like CTI short cut /View-Data Set Transfer
- Web Service /URL Call through Right Now Code /Chat event

Points to consider for the solution(s)

- Usability Issues / Challenges
- Simplified /Consistent UI
 - Simplicity
 - Mobility
 - Extensibility
- Performance
- Support
- Upgrade issues
- Customization, Vulnerability of solution
- Efforts
 - Development effort
 - Integration effort
 - QA effort

New Proposed Solution

- Redesign Chat/Incident UI
- Expanding e-Mail through Right Now
- Links to Open Siebel Session in external popup
- Enhanced data sharing with OneVoice
- HIPAA, Compliance
- BICS – Enhanced Service Cloud Reporting

New proposed Right Now Console Look -1

The screenshot displays a web application window titled "Preview of New Incident". The interface is divided into several sections:

- Home Bar:** Contains navigation icons for "New", "Save", "Save & Close", "Refresh", "Delete", and "Print", along with an "Info" icon and a "Links and Info" section.
- Form Fields:** A series of input fields for SR details:
 - SR #: [Empty]
 - PER ID: N/A
 - Contact*: [No Value]
 - Specialist: OneVoice Support
 - Queue: [No Value]
 - Created: [Calendar icon]
 - Closed: [Calendar icon]
 - Reference #: 170220-500000
 - Summary: [Empty]
 - Product: [No Value]
 - Resolved?: [No Value]
 - Status*: Open
- Actions:** A prominent blue button labeled "Create/Update SR" is located at the bottom left of the form area.
- Right Panel:** A pane with tabs for "Cobrowse", "Transcript", "User History", "Session History", "Incident History", and "Attachments". The "Transcript" tab is active, showing a rich text editor with a toolbar (bold, italic, underline, link, unlink, list, etc.) and a "Send On Save" checkbox. The content area is titled "Customer Entry" and contains a "Phone" icon.
- Footer:** A status bar at the bottom indicates "Logged in as: OneVoice Support" on the left and "100%" zoom level on the right.

New proposed Right Now Console Look - 2

The screenshot displays the Oracle Service Cloud interface for 'insperityrightnow_upgrade'. The top menu bar includes 'File', 'Home', and 'No Chats'. The left navigation pane shows 'Recent Items' with a search bar and a list of items, and a 'Navigation' section with categories like 'Configuration', 'Staff Management', 'Application Appearance', 'Site Configuration', 'Service', and 'Database'. The central area shows a ticket search result for '170103-000067' with fields for SR #, PER ID, Contact, Specialist, Queue, Created, Closed, Reference #, and Summary. A 'Create/Update SR' button is visible. The right-hand side features a 'Transcript' window with tabs for 'Cobrowse', 'Transcript', 'User History', 'Session History', 'Incident History', and 'Attachments'. The transcript shows a chat session with Michael Keene, dated 01/03/2017 09:44 AM, discussing a W4 form submission. The bottom status bar indicates 'Logged in as: OneVoice Support' and 'Editing 2 objects (1 modified)'. The bottom right corner shows a 100% zoom level.

New proposed Right Now Console Look - 3

insperityrightnow_upgrade - Oracle Service Cloud

File Home

Undock Co-Browse Terminate Transfer Conference Change Lead Role Join Cancel

Editor Session

My Inbox * x MORGAYNE CIESLAK:11605 x

PER 2509190

Contact* MORGAYNE CIESLAK

Ref # 170224-000000

Chat # 11605

End-User Browser Chrome 56

End-User Operating System Windows 10

Chat Cobrowse Tickets

Compose

SmartAssistant Search Knowledgebase Standard Text

I'll be happy to assist you with that. You will need to complete the Mid-Year Election form. It can be found on the Benefits tab under Forms.

Render as HTML

Send

Thank you for contacting Insperty. My name is Alex. How may I help you? 10:39:58 AM [00:00:02]

MORGAYNE CIESLAK says: 10:40:27 AM [00:00:29]

I just had a baby. How do I add her to my insurance?

Duration: 00:01:08

New proposed Right Now Console Look - 4

The screenshot displays the Oracle Service Cloud interface. At the top, there is a menu bar with 'File' and 'Home' options. Below this is a toolbar with icons for 'Undock', 'New', 'Save', 'Save & Close', 'Refresh', 'Print', 'Copy', and 'Info'. The main content area is divided into two sections. On the left, there is a 'Recent Items' sidebar with a 'Navigation' panel. The main area shows a service request (SR) for '170224-000000'. The SR details include: SR # 1-724548944, PER ID 2509190, Contact MORGAYNE CIESLAK, Specialist Alex Humeniuk, Queue Benefits, Created 02/24/2017 10:41 AM, Closed 02/24/2017 10:41 AM, Reference # 170224-000000, Summary Chat Session, Product Benefits, Resolved? Yes, and Status* Closed. A 'Create/Update SR' button is located at the bottom of this section. On the right, there is a 'Chat Transcript' window showing a conversation between Alex Humeniuk and MORGAYNE CIESLAK. The transcript includes the following text: 'Thank you for contacting Insperity. My name is Alex. How may I help you?', 'MORGAYNE CIESLAK: I just had a baby. How do I add her to my insurance?', 'Alex: I'll be happy to assist you with that. You will need to complete the Mid-Year Election form. It can be found on the Benefits tab under Forms.', 'MORGAYNE CIESLAK: thanks!!', and 'MORGAYNE CIESLAK' disconnected ('Ended by Contact').

SR # 1-724548944

PER ID 2509190

Contact* MORGAYNE CIESLAK

Specialist Alex Humeniuk

Queue Benefits

Created 02/24/2017 10:41 AM

Closed 02/24/2017 10:41 AM

Reference # 170224-000000

Summary Chat Session

Product Benefits

Resolved? Yes

Status* Closed

Create/Update SR

Cobrowse Transcript User History Session History Incident History Attachments

Send On Save SmartAssistant Search Knowledgebase Standard Text Options

System Default Plain Text

Chat Transcript Chat Alex Humeniuk, 02/24/2017 10:41 AM

Thank you for contacting Insperity. My name is Alex. How may I help you?

MORGAYNE CIESLAK: I just had a baby. How do I add her to my insurance?

Alex: I'll be happy to assist you with that. You will need to complete the Mid-Year Election form. It can be found on the Benefits tab under Forms.

MORGAYNE CIESLAK: thanks!!

MORGAYNE CIESLAK' disconnected ('Ended by Contact').

What's next @ Insperity - CRM & Service Cloud

- What's next for Siebel CRM ?
 - CRM (Siebel) upgrade Innovation Pack IP2017
 - OneVoice application redesign, Open UI /UX changes (Usability)
 - Mobile / Smart device enable
 - Platform upgrade, Hyper-V Servers (Windows 2012 R2)
 - Database SQL Server 2014/2016 upgrade
 - UPK Implementation
 - Integration Enhancements /Redesign
 - Enhanced 360⁰ Reporting
 - BICS On-premise, Cloud, Hybrid Reporting (CRM, Service Cloud)
- What's next for Service Cloud ?
 - Expand chat and co-browse functionality to service providers (Business Users/Recruiting)
 - Expanding e-Mail through Right Now
 - Usability improvements
 - Redesign Chat/Incident Workspaces
 - Enhanced data sharing with OneVoice
 - Links to invoke Siebel externally
 - Upgrade

Please Complete Your Session Evaluation

Evaluate this session in your COLLABORATE app.
Pull up this session and tap "**Session Evaluation**"
to complete the survey.

Session ID: **10294**



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Q&A

Thank You !!!

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