

# Insperity's Open UI Upgrade Project, Increased Agility by Rapid Adoption of Siebel Innovation Pack

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Insperity's case study for upgrade, improvements in business agility, by adopting Oracle's Siebel innovation packs

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Time and Attendance



# Introduction

## Aashish Mahodaya

Supervisor, Customer Relationship Management,  
Technology - Business Applications

Leading CRM/Business Intelligence Team,  
Working as technical leader for CRM/OBIEE  
strategy, development, integration & production  
support.



## Matt McNeese

Advisor CRM Business Applications Developer

Advisor, solution designer for CRM /OBIEE  
development, integration & production support.



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# Agenda

- Insperity
- OneVoice, CRM Application – Architecture
- CRM Application usage, User Group
- CRM Application Case Study
- IRM, Enhancements
- Open UI upgrade 2014 decision
- Open UI Upgrade Project Details
- Open UI Upgrade Process, Patch Set Process
- Open UI Features/Advantages
- Service Cloud Integration
- Upcoming Siebel Enhancements IP2015/16...



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# Insperity - Current CRM/BI Applications



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- Insperity is currently running Siebel On Premise CRM version IP2014 (PS12)
  - For approximately 1,400 users
  - Core Siebel modules include CRM Base, Call Center, Email Response, and Field Service
- Insperity is currently running OBIA 7.9.6.4 and OBIEE 11.1.1.9 (BIFS, Hyperion – Essbase)
- Oracle 11g DB, SQL Server DB
- Oracle Service Cloud /Right Now – November'2015 Release
- Oracle Siebel On-Demand, Net Suite CRM

# CRM/BI Application User Groups



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- 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



# Insperity CRM/BI business process related to solutions -



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## Services Solutions

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

## Product Solutions

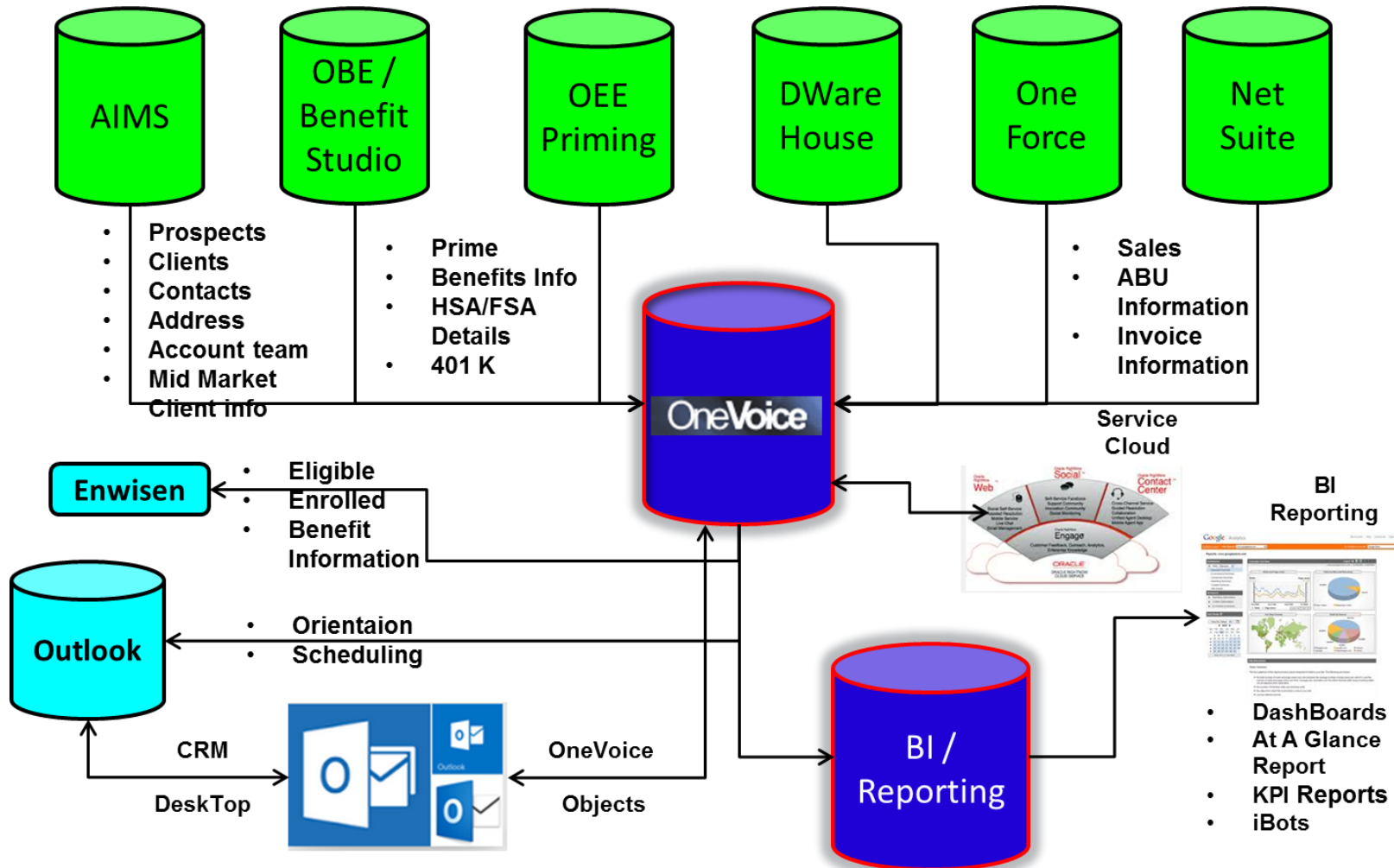
- Performance Management
- Organizational Planning
- Expense Management
- Time & Attendance
- Human Capital Management
- Financial Management



# Case Study – OneVoice (CRM/BI Architecture)



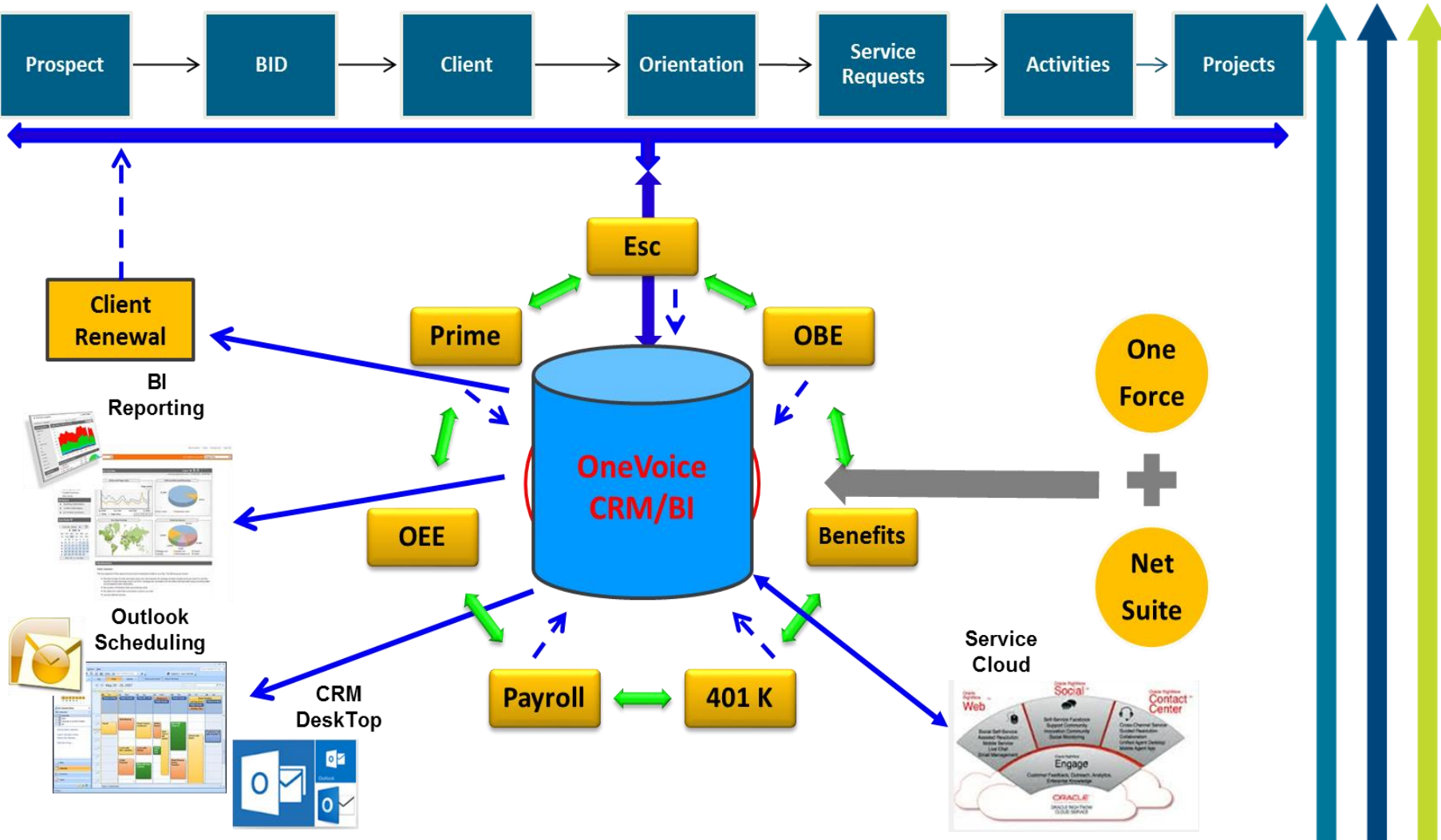
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# Case Study – OneVoice (CRM/BI Process Flow)



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# OneVoice (CRM)/BI usage



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- OneVoice provides 360 degree view of information for strategic business decisions
- Enhance Contact Center/Service Center productivity/performance
- Increase customer service level, service capacity and service efficiency – Standardization & Automation of business processes.
- Provide read only access to Legacy Application data
- Provide appropriate security controls to information
- BI /Analytics allows insight into customer trending through Dashboards/Analytical Reporting (eg. At A Glance Report)
- BIP, real time CRM reporting
- CRM DeskTop, Integration between Siebel & Outlook
- Service Cloud/Right Now (Chat/Co-browse) Siebel Integration



# OneVoice (CRM)/BI usage continued..



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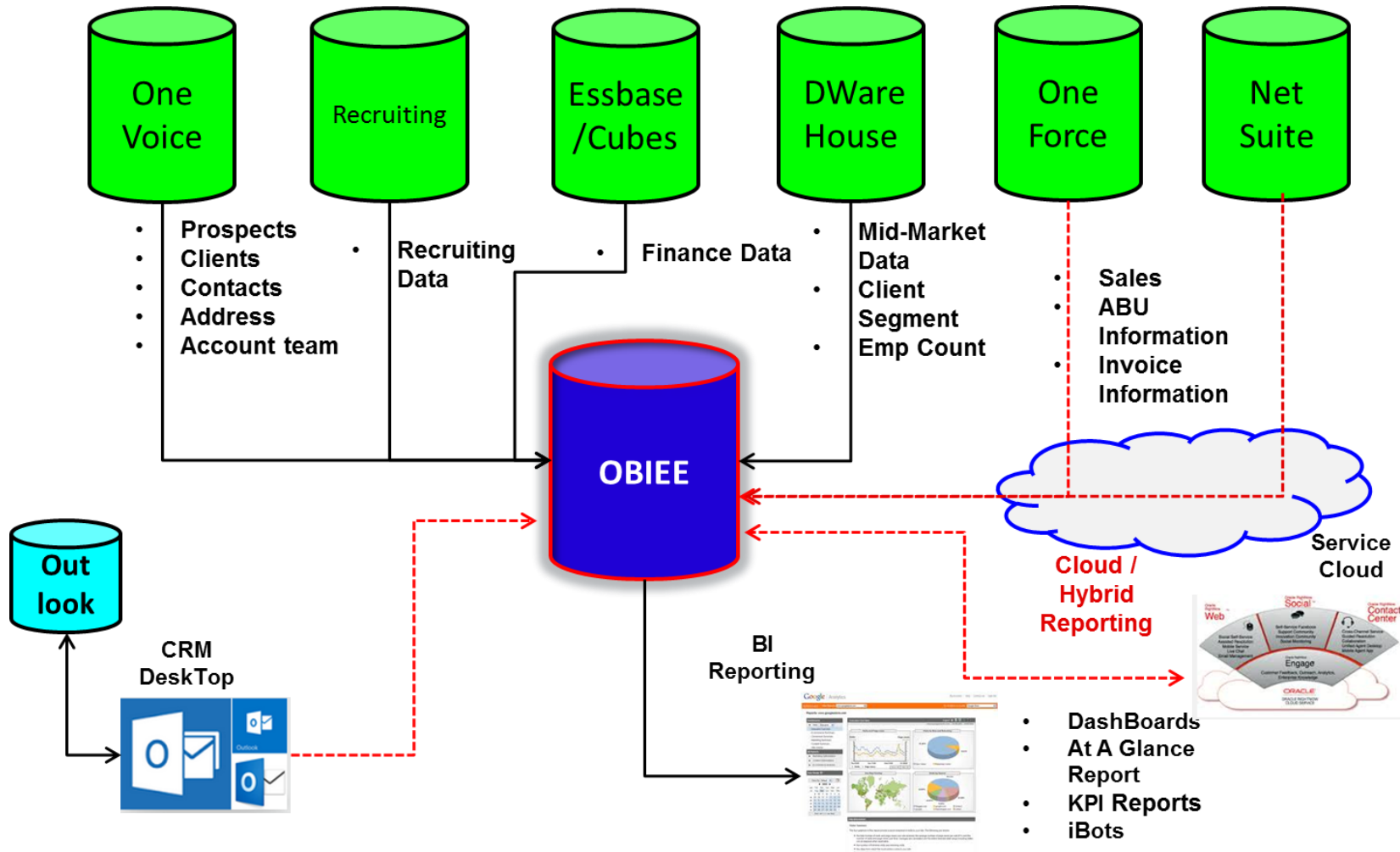
- Enterprise wide reporting solution ( Service, Finance, Recruiting.....)
- Self-service, Ad-hoc reporting tool for power users/end users
- Complete spectrum for reporting, analysis, modeling and forecasting
- Historical Reporting
  - Finance
  - Mid-Market Related Accounts/Growth Forecast
- Predictive Analytics model for Mid-Market
- Integrated with OneVoice.
- Action links to navigate back to source from a specific record.



# OBIEE Architecture (Current/Future)



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# OneVoice IP 2014 Upgrade



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- Initial upgrade decisions criteria
  - Insperity OV from Siebel 8.1.1.7 to 8.1.1.11 /Open UI
  - Insperity OV from Siebel 8.1.1.7 to IP 2013 or IP 2014
  - New environment or in-place
- OUI vs HI expectations
- Dual URL's (Earlier plans for Dispatch Board/SSSE)
- In-place Upgrade
  - Never been tried for our upgrade path
- PS 3 → PS4 → PS5 (Dispatch Board fix, Drag-Drop, & other issues)
- Decision to go with IP2014 PS5
- Insperity' s initial plan was to upgraded Siebel 8.1.1.7 to 8.1.1.11/ IP2013 (Open UI)
- Insperity choose to early adopt IP2014 (PS5)
- Completed upgrade from Siebel 8.1.1.7 to IP2014 (PS5) in June'15



# OneVoice Upgrade – Innovation Pack 2014



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- What's included:
  - Mobile device support
    - Device Recognition, Any device and platform
    - Automatic device recognition/rendering
    - Configurable and extendable
  - Enhanced UX (Open UI Frame work)
    - Redesigned out-of-box UI
    - Persona driven UI
    - Responsive web design
      - Configurable and extendable
  - Dispatch Board improvements/availability
  - Java APIs
  - JQuery/HTML5



# Incremental Repository Merge



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- Rapid/Agile upgrade deployments
- Lowering Cost of upgrades
- Faster deployments of incremental innovation packs
- Increased Validations
- Error handling validations
- Reports and Analysis of seed/repository data & changes
- Reduces testing efforts/time
- Reduces implementation/go live time



# Incremental Repository Merge, Enhancements



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- Reduced complexity, addition for upgrade path support for IP2015/16
- Optional uptake
- Enhancements to merge cloned objects (upgrade ancestor)
- Performance Improvements to Web Template Migration
- Developer preview for composer mode
- Performance improvements to reduce production upgrade time.

# Incremental Upgrade - Benefits

- IRM – In place upgrade, smaller / faster than full upgrade
- Completed IRM's in Pre-Prod (DEV & TEST) environment
  - Started with IP2013, moved to IP2014 for dev
  - Production directly to IP2014 PS5
- Usage of Parallel development during the upgrade process
- Customizations preserved, lesser conflicts, faster go live
  - Critical conflicts very limited, mostly with BIP
- No big bang upgrade, incremental upgrade was quick
  - Dev upgrade using IRM completed in less than 2 days (end to end)



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# Overall Upgrade Process- Challenges/Considerations



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## Challenges

- Dispatch Board Performance
- Iterations with UI theme/redesign
- UI Performance
- Custom File Import Process
- Embedding Analytics/i-Help changed
- DLLs/ files mismatch issue

## Considerations

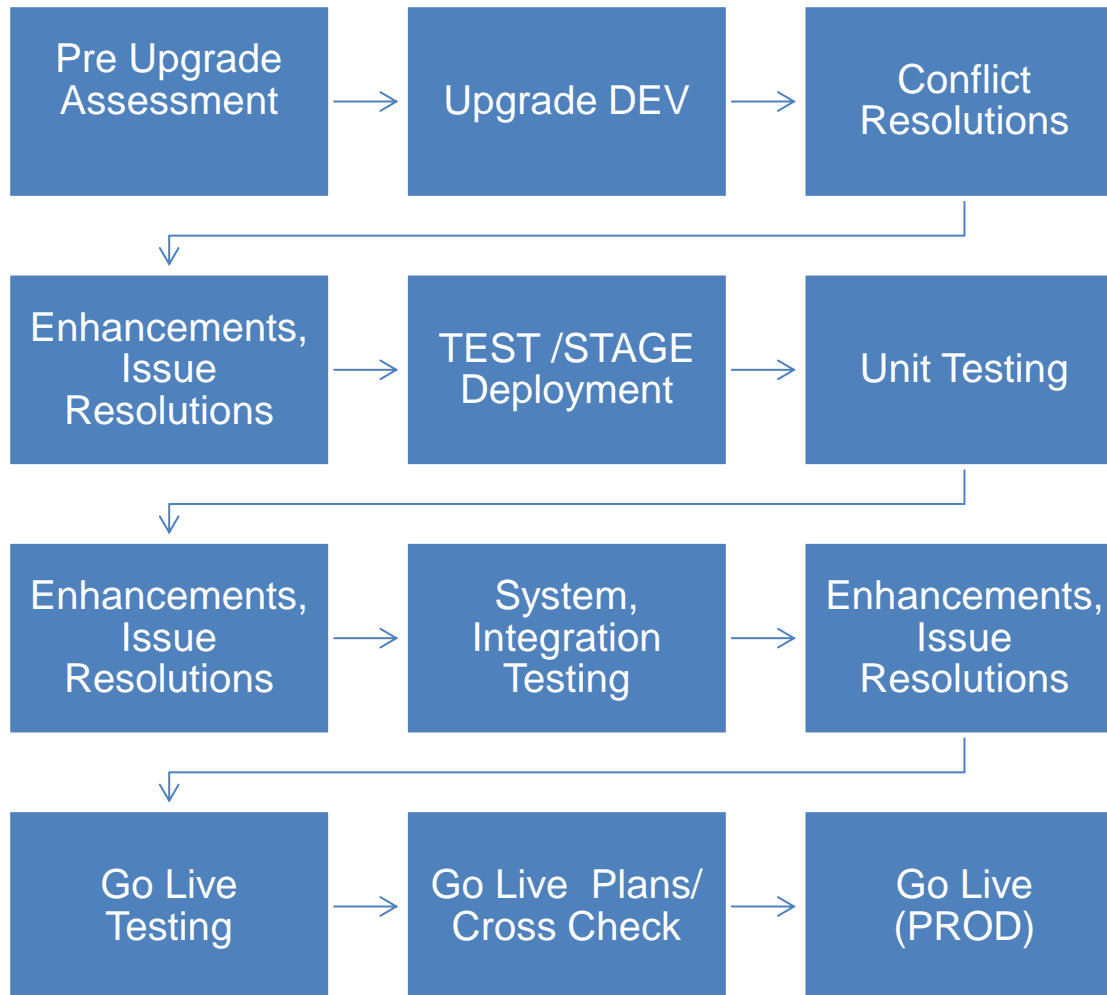
- Load/Stress testing in Pre-Prod
- Back end tuning, performance improvements
  - New indexes/ Denormalization
  - New configuration changes
  - Custom visibility changes
- Insperity custom themes
- Business Service /Browser Script Changes
- Symbolic URL embedding
- Parallel Development



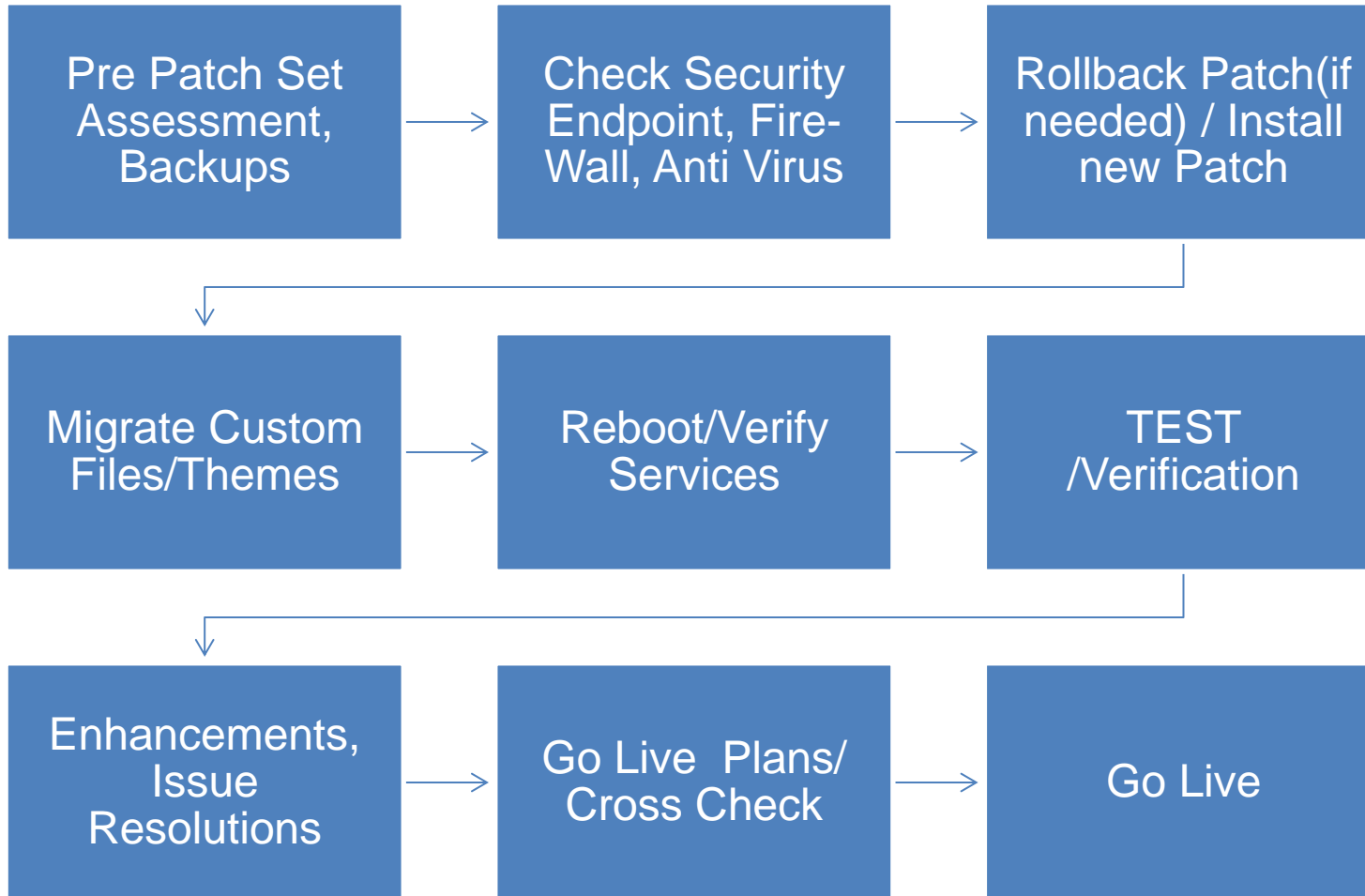
# Upgrade Process & Timeline



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# Patch Set Process





# Insperty Advantages



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- Open UI /Patch Set Advantages
  - New Modern Look and Feel (Insperty themes)
  - Personalized Application
  - User Adoption
  - Multiple Device Support
  - Browser Independence
  - Productivity Improvement
  - Faster, Lower Cost Development
  - Dispatch board fix/improvements
  - List/Form Applet performance improvements
- Open UI Upgrade vs Earlier Upgrade
  - Time
  - Cost
  - Resources
  - Development Effort
  - Parallel development



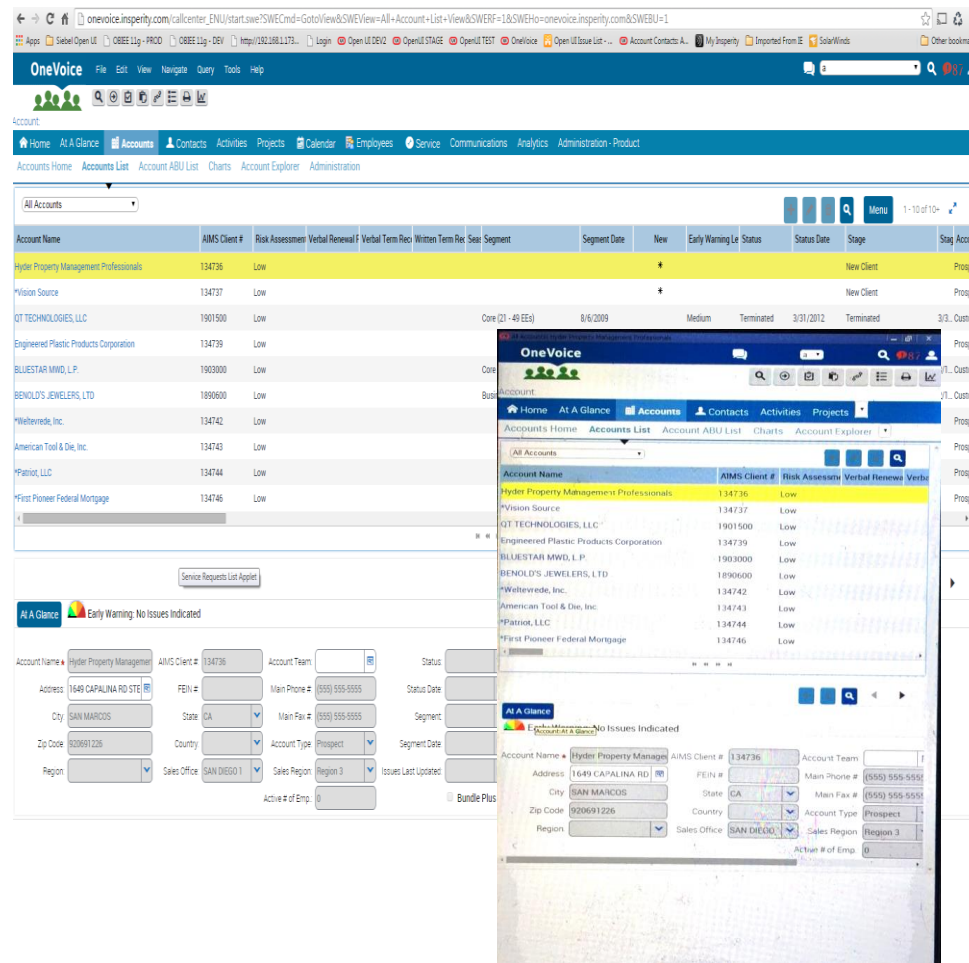
# Responsive Web Design



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- Single Open UI framework for both Touch and Non-Touch devices
- Responsive applications that adjusts to Screen Form Factors and Device Capabilities
- New UI theme - Responsive and modern
- Web Templates – adds new easy to use templates with modern design
- JavaScript API - New API to allow open extension of functionality





# Best Practices & Lesson Learned

- Assess
  - Pre upgrade Assessment
- Research
  - Research Known Issues/Bugs(Resolutions)
  - Follow guidelines in Upgrade Advisors
- Plan
  - Proper Project Planning (DEV/TEST/STAGE/PROD)
- Track Issues
  - Maintain Issue Log
  - Categorize issues to decide about go-live/roll back
- Technical
  - Verification of Merge Conflicts
  - Check, Verify Environment
- Go Live Check List



# Right Now – Oracle Service Cloud (Chat/Co-browse)



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



# Usability Issues / Challenges

- Simplified /Consistent UI
  - Simplicity
  - Mobility
  - Extensibility
- Browser Compatibility
  - iframe integration
  - Symbolic URL
- Customization
- Application Integration (On-premise/Cloud)
  - On Premise CRM – Service Cloud
  - On Premise CRM – BI Integration



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# What's Next – V16(IP2016)

- IP2014 (8.1.1.14.14/15)
  - Dispatch Board and other enhancements/Issue fixes
- Siebel Composer, Web-based development tool
- No SRF /No Web Templates
  - Workspace based development
- CAL DAV Interface
  - Integration between Siebel/Calendar
- Drag n Drop Outlook Plugin
- Richer User Experience (Alta)
- Open UI rendering
- Restful Web Service Integration
  - Enhanced API Integration
  - Expose Transactional & Repository Data/Meta Data
  - Proxy OM – Tomcat management (JSP/Servlets etc)



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# What's Next – V16(IP2016) Continued...

- Usage Pattern Tracking (UPT) - How users navigate and use the application
  - Real Time Analysis
  - Stress/Load Testing
  - Upgrade, what/ how much used
  - Using Siebel Workflows/Runtime Events
  - Non Audit Trail – No I/O on db
- Siebel Search
  - Enhanced Siebel Search
- Certifications
  - Microsoft Windows Server 2012 R2
  - Microsoft SQL Server 2012 R2
  - Office 2013
  - Java 8



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# Insperty's Open UI Upgrade Project, Increased Agility by Rapid Adoption of Siebel Innovation Pack

- Insperty's current CRM Application Architecture & Integration scenario
- Open UI Upgrade Project details; Open UI upgrade decision criteria and lessons learned
- Open UI Features/Advantages, leveraging Incremental Packs & Patch sets for our implementation
- Considerations, unforeseen challenges, constraints and resolutions for Open UI upgrade project
- Future Plans for Patch Set deployments; IP 2015/2016 upgrade scenario



# Questions, Comments, Feedback....



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Thank You !!!

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