



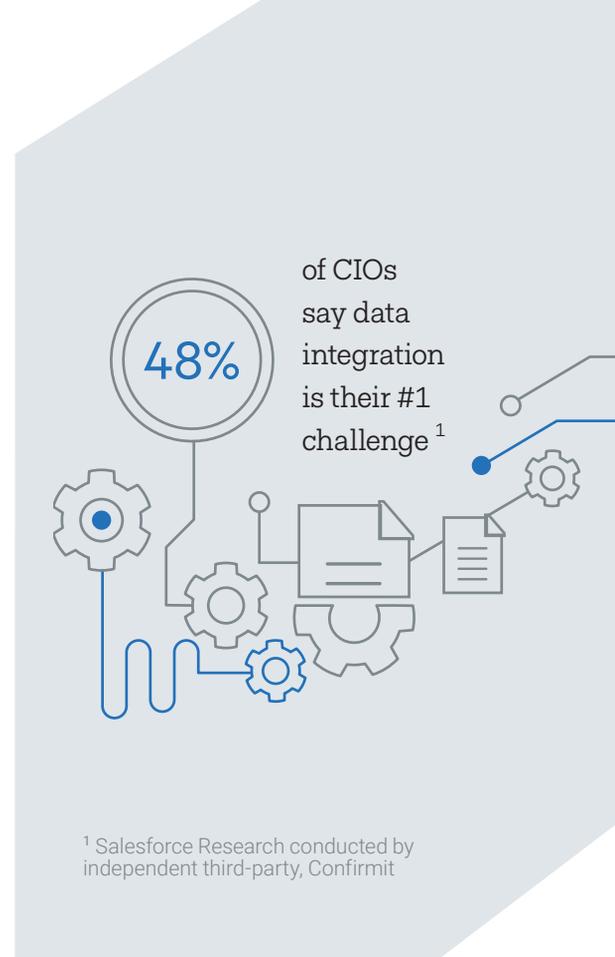
# **THE FASTEST, EASIEST WAY TO INTEGRATE ORACLE SYSTEMS WITH SALESFORCE**

Real-Time Integration, Not Data Duplication

Salesforce may be called the “Customer Success Platform,” but success with this CRM is highly dependent on access to the right data. Not all customer data lives in Salesforce. For many companies, data resides in backend systems and data sources beyond Salesforce—Oracle databases and applications such as Siebel CRM, JD Edwards Enterprise One, E-Business Suite and Peoplesoft Enterprise, as well as data warehouses using Oracle as a data source.

For years, IT architects faced the challenge of creating real-time connections across numerous siloed applications—an issue that has delayed progress for enterprises hoping to drive new business, serve customers better and streamline business processes. Most companies want their IT department focused on delivering innovation, not integration. In short, they need an easy way to access Oracle data from the Salesforce platform.

This whitepaper explores the advantages of implementing a real-time Salesforce data integration strategy for companies running Oracle databases and applications.



## Traditional Approaches to Salesforce Data Integration

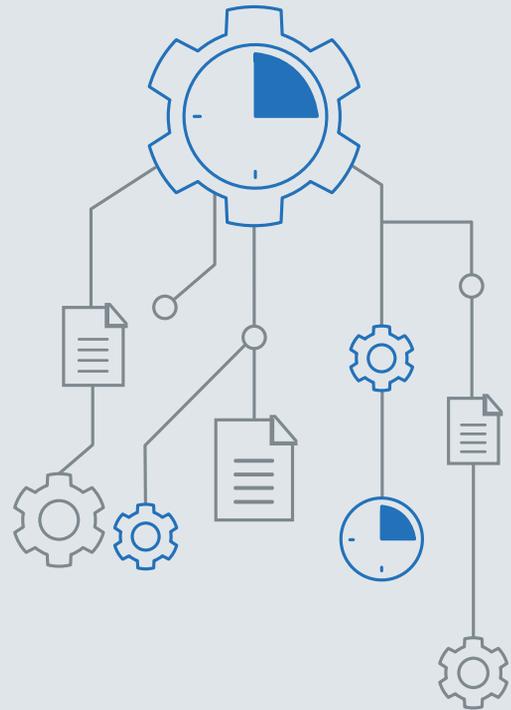
Traditional data integration, or ETL (extract, transform and load), requires moving, copying and synchronizing data. The challenge in this strategy is integrating large volumes of data that may be out of date before the process is finished. Other integration approaches require extensive development projects to build web service callouts from Salesforce, and bridge them together with middleware.

Both strategies are outside the realm of the Salesforce CRM group, which may feel pressure to deliver data-driven features to their Salesforce users. Most importantly, such approaches inhibit the Salesforce team’s ability to be agile with changes, because of dependency on outside teams.

# The Challenge of Integrating Legacy and Cloud Systems

Companies want everything they need to be in Salesforce, but many struggle with integrating legacy and cloud systems because it's expensive, time-consuming and a burden on IT resources. They don't want to worry about where data is anymore. They don't want to disrupt business processes. And, they don't want to copy or store data inside Salesforce. They need an easier approach that leaves systems of record intact while integrating that data in real-time with Salesforce. According to Gartner, "More organizations are demanding that data be delivered or processed in real time to match the speed of their business. They expect reduced latency and real-time data delivery."<sup>2</sup>

What's needed is a painless Oracle data integration strategy that offers plug-and-play compatibility with the Salesforce ecosystem.



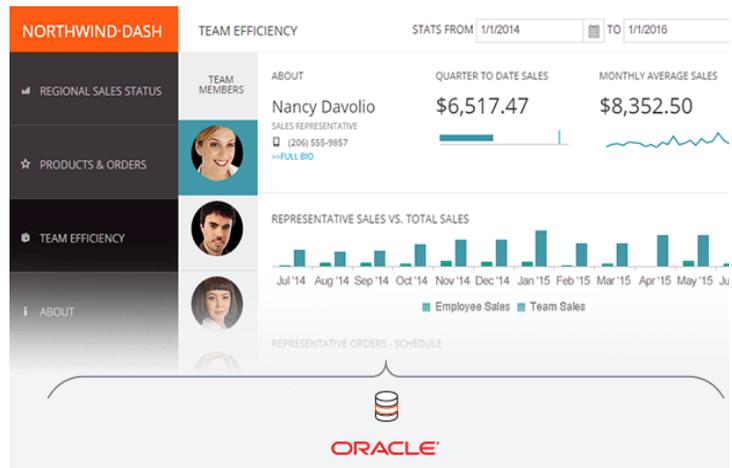
"More organizations are demanding that data be delivered or processed in real time to match the speed of their business."

**Gartner**

<sup>2</sup> Gartner, "The State of Data Integration: Current Practices and Evolving Trends," Eric Thoo, Ted Friedman, Mark A. Beyer, 03 April 2014.

# Salesforce Connect and OData

How can companies create real-time data integration without a huge development effort? This is accomplished first through Salesforce Connect (formerly “Salesforce Lightning Connect”), an integration strategy from Salesforce launched in 2014. Using industry standard Open Data Protocol (OData), Salesforce Connect provide a way for any external data to be integrated into Salesforce, as long as the data is accessible via OData. No coding is required.



According to Larry Carvalho, research manager for platform-as-a-service (PaaS) at market research firm IDC, Salesforce is addressing an issue that’s been hindering progress in enterprises for years: “Addressing the severe shortage of developers through automation of the application development lifecycle is an important differentiator and the whole IT market could benefit from such initiatives. Salesforce is addressing the need for connecting multiple applications by capabilities within their own product, which helps their customers gain efficiency.”<sup>3</sup>

However, Salesforce Connect by itself does not provide the required OData connectivity to Oracle databases and applications; nor do Oracle applications provide native support for OData. As such, in addition to Salesforce Connect, companies need a solution that exposes Oracle data in an OData-compatible way.

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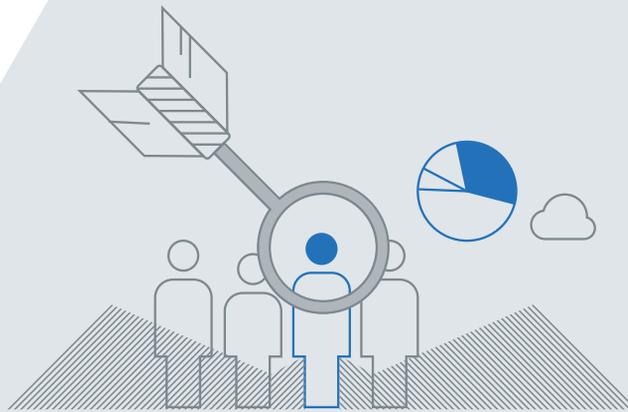
**Larry Carvalho, IDC**

<sup>3</sup> Jessica Davis, “Salesforce Connect Opens App Dev To Non-Coders,” 23 December 2015, InformationWeek, <<http://www.informationweek.com/cloud/platform-as-a-service/salesforce-connect-opens-app-dev-to-non-coders/d-d-id/1323395>>

# Why OData?

Originally developed by Microsoft, and subsequently adopted as an OASIS standard, OData is a protocol for providing access to data over the Internet. OData is a simple, standardized way to interact with data on the web from any platform or device. It's built on the HTTP standard, JSON (a standard data exchange format) and REST (a commonly accepted methodology for working with web resources.)

SaaS vendors such as Salesforce are adopting OData as an external data strategy because of its interoperability and ability to support both on-premise and cloud data sources. OData is quickly gaining ground over traditional data integration patterns for its web-friendly approach and interoperability across a wide ecosystem of existing applications and data sources. (See [odata.org](http://odata.org) for more information on OData.)



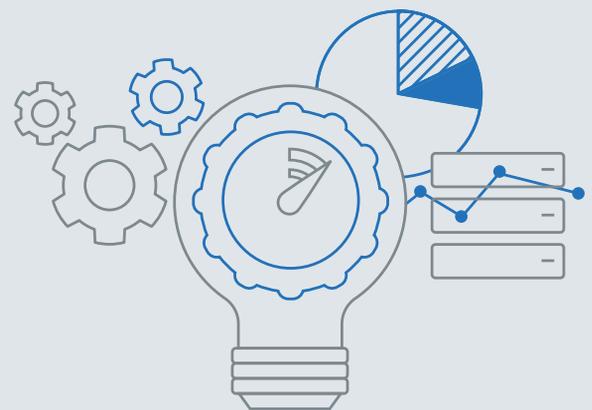
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# OData Connectivity Solutions

Because OData tooling is currently limited in the Oracle ecosystem, companies need to find solutions that produce OData to be consumed by Salesforce Connect. Options for supplying the necessary OData connectivity include do-it-yourself projects, third-party middleware software or OData connectivity solutions.

IT can custom-build an OData producer and connectivity into Salesforce for each Oracle application or data source. However, an internal do-it-yourself solution such as this could take months of dedicated development effort, often resulting in a brittle integration with no guarantee of success or scalability. Third-party middleware solutions require licensing, installing and configuring additional software components. With both options, you must still traverse the firewall to expose the data to Salesforce. The firewall adds a layer of complexity that necessitates network and security expertise.

Fortunately, new technology offers a more efficient, cost-effective option: Real-time OData connectivity solutions.



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# Benefits of a Real-Time, OData Connectivity Solution

A real-time, OData connectivity solution combines OData services with built-in access to external Oracle data sources, in the cloud and on-premise. The solution exposes external Oracle data as an OData feed to Salesforce Connect in real time.

An OData connectivity solution provides the quickest way to expose Oracle data, without requiring changes to a company's databases or servers, and without requiring the installation of complex middleware components. This innovative technology simplifies data integration challenges with one approach that can be easily repeated across use cases. The best solutions don't require coding and enable secure access to data behind the firewall. And, ideally, they can be implemented without requiring major staff retraining.

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## Key Benefits

Companies can expect the following benefits when implementing an OData connectivity solution combined with Salesforce Connect:

- **Real-time access to external Oracle data:** Provides a direct connection from Salesforce to Oracle ERP/CRM systems and databases, without moving or duplicating data. Salesforce users can access external Oracle data from within Salesforce.
- **Faster time to value:** Eliminates the need for extensive integration projects or additional middleware software to install and configure.
- **Agile environment:** Improves productivity for both developers and Salesforce administrators immediately, enabling them to use their existing skill sets and maintain data access easily, over time, as systems and teams change.
- **Hybrid connectivity:** Offers access to Oracle in the cloud and on-premise.

# What to Look for in an OData Connectivity Solution

- **Enterprise-ready:** Can the solution run reliably and effectively within a large organization today?
- **Easy to use:** Is the interface easy to understand and use by current staff? Can Salesforce administrators use it, or do you need a specialist to code the setup?
- **Scalability:** Can the solution handle thousands of concurrent connections and large volumes of data, without latency?
- **Database support:** Does the solution support a wide range of Oracle applications and database versions to prevent implementation delays and to future-proof data integration?
- **Impact on existing systems:** Does the solution require changes to the infrastructure or underlying databases, or additional software to be installed?
- **Security:** Can the solution safely traverse the firewall to access on-premise Oracle data?
- **Experience:** Is the vendor an established leader in data connectivity with at least 10 years of experience?
- **Support:** Can the vendor provide enterprise-class, 24/7 technical support?
- **Proven:** Is the solution proven at a large organization?

## DataDirect Cloud: A New Breed of Real-Time Data Integration

An enterprise-ready OData connectivity solution, Progress® DataDirect® Cloud® provides the quickest way to integrate Oracle data in real-time via Salesforce Connect. DataDirect Cloud does not require any changes to a company's databases or servers, nor does it require installing any complex middleware components. DataDirect Cloud empowers Salesforce teams with a simple data integration strategy that promotes speed and agility.

An enterprise-ready OData connectivity solution, DataDirect Cloud provides the quickest way to integrate Oracle data in real time, via Salesforce Connect.

DataDirect Cloud is designed and developed by Progress, the recognized leader in data connectivity and integration for more than 30 years. Providing data connectivity for more than 140,000 enterprises and over 5,000 independent software products, Progress has established an unparalleled customer base worldwide.

Progress is also known for its responsive, award-winning technical support. In addition, Progress has an ongoing partnership with Oracle, and is a member of TSANet, a multi-vendor support community, including Oracle. This simplifies complex, multi-vendor troubleshooting. Progress is also a voting member of the OData/OASIS standards committee.

## Key Features

- “Clicks, not Code” setup
- Supports Oracle 8i through 12c
- Supports Oracle Service Cloud (RightNow) and Oracle Marketing Cloud (Eloqua)
- Supports Oracle in the cloud or on-premise behind the firewall
- One Salesforce Connect license supports multiple Oracle endpoints
- Leverages full text search for more efficient queries
- Supports read/write operations

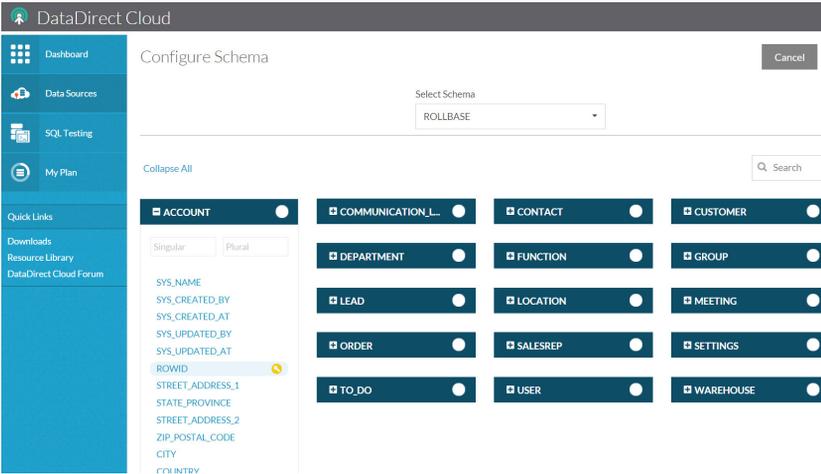
## Advantages

DataDirect Cloud provides the following unique advantages:

- **Enterprise-ready solution:** DataDirect Cloud is extremely scalable and already in production at large enterprises, supporting thousands of users with direct, real-time connections to Oracle
- **Wide breadth of Oracle version support:** Salesforce teams can get up and running quickly, ensuring support for both newer and older versions of Oracle
- **Support for multiple endpoints:** One Salesforce Connect license supports multiple Oracle databases via DataDirect Cloud to save on licensing costs
- **“Clicks, Not Code” interface:** Makes developers and Salesforce administrators productive immediately using existing skills, and more agile for future integrations
- **Access to data inside the firewall:** DataDirect Cloud safely exposes Oracle data behind the firewall as an OData feed that Salesforce Connect can consume, without time-consuming firewall engineering
- **No infrastructure changes:** A cloud-based data connectivity service, DataDirect Cloud doesn’t require modifications to the database or installation of complex middleware
- **Enterprise-class technical support:** DataDirect Cloud includes 24/7 “follow the sun” technical support via telephone, web or email

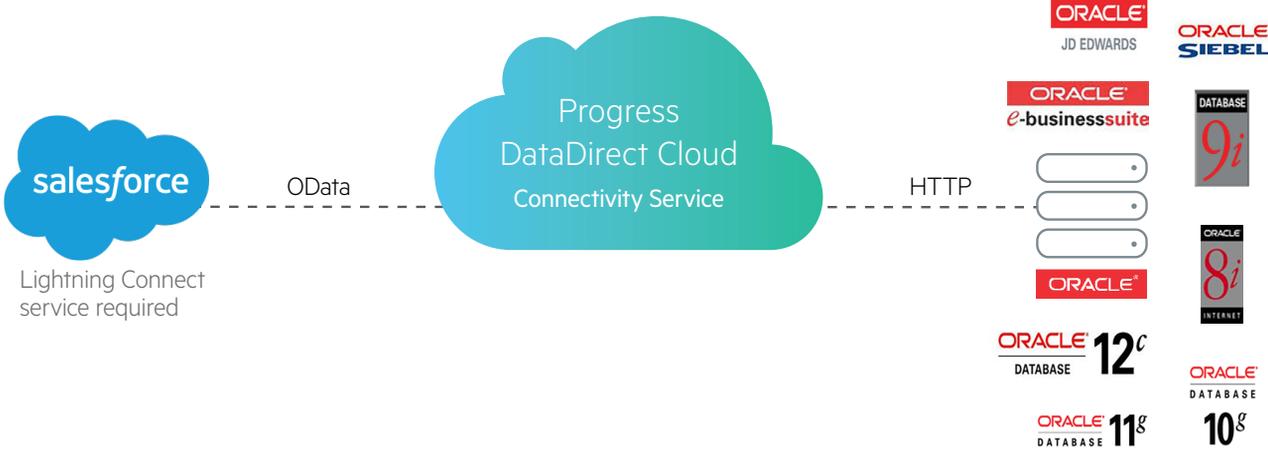
# How DataDirect Cloud Works

DataDirect Cloud is a connectivity service that provides an OData interface and access to multiple versions of Oracle. This interface enables Salesforce to connect to the Oracle data sources exposed by the service. DataDirect Cloud accepts OData statements, translates them to SQL, then forwards the SQL to the backend Oracle data source to be executed.



Configuring the connection to Oracle through DataDirect Cloud is simple:

1. Define the target data source(s) in DataDirect Cloud. (To set up a data source for data stores behind a firewall, install and configure the On-Premise Connector.)
2. Specify which tables to expose via OData.
3. In Salesforce Connect, define the external data source by pointing to the address for the OData service associated with this data source.
4. Synchronize the meta data to define the external data object.
5. Access the data from within Salesforce.com.



# DataDirect Cloud in Action

A leading financial solutions company needed to bring customer data from Siebel into Salesforce, to enable sales agents to better serve customers.

Migrating the data and building connectivity into Salesforce would be difficult and time-consuming, potentially taking six to nine months, or more. More importantly, keeping the data accurate and up to date would have been nearly impossible.

Combining Salesforce Connect and DataDirect Cloud, the company achieved rapid integration between Salesforce and Siebel, providing sales agents with real-time access to customer data from within Salesforce.

The new solution was implemented quickly, moving from proof-of-concept to production in weeks not months. Today it's one of the largest production Salesforce Connect installations, with 6,500 agents using the platform to access the data they need, when they need it. All this was accomplished with minimal development costs and no changes to the existing infrastructure.

**Note:** This success story is documented in the diginomica article, [“How Intuit integrated their user experience with Progress.”](#)



With the combination of Salesforce Connect and DataDirect Cloud, a leading financial solutions company achieved rapid integration between Salesforce and Siebel, providing sales agents with real-time access to Siebel data from within Salesforce.

To get familiar with OData and test it with your Oracle application or database today, try DataDirect Cloud free for 30 days.

[Try DataDirect Cloud](#)

## Learn More

 diginomica

How Intuit Integrated their User Experience with Progress

 OData

Webinar: OData External Data Integration Strategies for SaaS

 DZone

Getting Started With OData, "SQL for the Web"

## About Progress

Progress (NASDAQ: PRGS) is a global software company that simplifies the development, deployment and management of business applications on-premise or in the cloud, on any platform or device, to any data source, with enhanced performance, minimal IT complexity and low total cost of ownership. Progress can be reached at [www.progress.com](http://www.progress.com) or 1-781-280-4000.

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