SIEBEL eBusiness 7

APPLICATIONS ADMINISTRATION GUIDE

VERSION 7.5, REV. C

SEPTEMBER 2004

12-LQIUCJ

Contents

Chapter 11. Activities, Activity Plans, and Assessments

Chapter 12. Opportunities

Chapter 13. Calendar

Chapter 16. Proposals

Chapter 17. Literature

Chapter 18. D&B Integration

Chapter 19. Integration Using ASIs

Appendix A. System Preferences

Appendix B. Content Center Reference

Introduction

This guide covers general administration tasks for initial setup and ongoing maintenance of Siebel eBusiness Applications.

Specialized applications administration tasks are covered in a number of other books. See the *Siebel Bookshelf* CD-ROM.

This guide is primarily useful to people whose title or job description matches one of the following:

Siebel Application Administrators	Persons responsible for planning, setting up, and maintaining Siebel applications possibly adding new functionality.
Siebel Application Developers	Persons who plan, implement, and configure Siebel applications, possibly adding new functionality.
Database Administrators	Persons who administer the database system, including data loading, system monitoring, backup and recovery, space allocation and sizing, and user account management.
Call Center Administrators	Persons responsible for setting up and maintaining a call center. Duties include managing message broadcasts.

How This Guide Is Organized

The next four chapters of this guide should be read in the order presented. These chapters will be of interest to most readers.

The remaining chapters contain stand-alone topics about administering specific features of Siebel eBusiness Applications. These chapters can be read in any order.

There are two appendixes in this guide. One contains a table of system preferences. The other contains supporting reference material for the Content Center chapter.

Additional Resources

You can find information about other administration tasks in the following books:

- *Siebel Marketing Guide*
- *Siebel Field Service Guide*
- *Siebel Forecasting Guide*
- *Siebel Professional Services Automation Guide*
- *Siebel Employee Relationship Management Administration Guide*
- *Security Guide for Siebel eBusiness Applications*
- *Global Deployment Guide*
- *Siebel eSales Administration Guide*
- *Siebel Assignment Manager Administration Guide*
- *Siebel Communications Server Administration Guide*

Revision History

Applications Administration Guide

Version 7.5, Rev. C

Table 1. Changes Made in Version 7.5, Rev. C

Topic	Revision
"Setting Up Locales" on page 43	Clarified note about locale settings in different types of Siebel Client.
"Setting Up Predefined Queries" on page 53	Noted that in the preconfigured application, the records shown on the application home page are determined by the predefined query Default which is performed on the object WebCallCenter Home. Added a description of the Cache Result field in the Predefined Queries view.
"About Multi-Value Group Queries in Siebel Industry Applications" on page 55	Added information about multi-value group queries in SIA.
"About Date Formats" on page 76	Removed Caution. Date formats containing alphabetic versions of the month are now supported.
"Audit Trail Constraints" on page 117	Noted that changes made through Assignment Manager cannot be audited. Clarified procedure on how to determine if a business component can be audited.
"About Using Audit Trail with Object Interfaces" on page 126	Noted that when accessing an AOM through object interfaces you must invoke the Audit Trail Engine business service explicitly.
"About Configuring the Calendar Gantt Chart" on page 299	Added information about how to hide or display the Add Employee, Add Resource, Add Contact, Remove Participant buttons on the Calendar Gantt Chart. (This applies to software versions 7.5.2.214 and above.)
"Example Process Flow for Using Content Center" on page 168	Redrew diagram to clarify job rôles.

Table 1. Changes Made in Version 7.5, Rev. C

Topic	Revision
"Generating a Default Hierarchy" on page 247	Added the SIA navigation path for creating the global accounts default hierarchy.
License Tracking	Removed chapter: Siebel License Tracking is no longer supported.
"Configuring the Document Server" on page 307	Added information about: ■ Restarting the Document Server whenever the Siebel application server is restarted ■ Setting MaxTasks parameter ■ Setting Honor MaxTasks parameter for the Document Server
"Auto Mgr Calendar Access" on page 481	The default value of the Auto Mgr Calendar Access system preference is TRUE.

Version 7.5, Rev. B

Table 2. Changes Made in Version 7.5, Rev. B

Topic	Revision
About Siebel eBusiness Applications	Deleted this chapter.
"Creating a Message Broadcast" on page 145	Added a note about the importance of setting the correct server time to the field descriptions Activation Date/Time and Expiration Date/Time.
"Setting Up Locales" on page 43	Added a note to the Short Date Format field description about how incorrect dates are handled.
Chapter 5, "Audit Trail"	Rewrote this chapter for clarity. Audit Trail is not preconfigured for employee applications.

Table 2. Changes Made in Version 7.5, Rev. B

Topic	Revision
Chapter 6, “Message Broadcasting and Alerts”	Deleted section “Enabling Broadcast Alerts with User-Disabled Message Bars.”
“Publishing Content Projects” on page 188	Added a new section about publishing content projects.

January 2003 Bookshelf

Table 3. Changes Made in Rev. A for January 2003 Bookshelf

Topic	Revision
Chapter 7, “Messages”	Added this chapter.
“Modifying a List of Values” on page 108	Added the second bullet.
“Enabling and Disabling Message Broadcasting” on page 142	Added a procedure on how to enable and disable Message Broadcasting on the server.
“Enabling HTML Generation (Optional)” on page 309	Added a note.
“Configuring Report Generation (Optional)” on page 309	Added explanatory information.
“Assigning Skills” on page 42	Removed procedures from this section. The Assigning Skills procedures have been moved to the *Siebel Assignment Manager Administration Guide*.

Getting Started 1

Once the Siebel system is successfully installed, you need to enter license keys so that you and your organization can access the Siebel products that your organization has purchased. After the license keys have been entered, you will be ready to set up your Siebel applications.

Before you can begin to use your Siebel applications, the software listed in Table 4 must be correctly installed.

Table 4. Required Software

Software	For Information, See
Siebel Gateway Server	*Siebel Server Installation Guide*
Siebel Server	
Siebel Database Server	
Siebel eBusiness Applications	Application-specific administration guide and this guide.
Either Siebel Dedicated Web Client or Siebel Tools	*Siebel Web Client Administration Guide* or *Siebel Tools Reference*

Once these Siebel servers and applications are successfully installed, you can proceed to enter license keys for specific Siebel applications.

Starting the Application for the First Time

In order to begin setting up your Siebel application, you must log in with administrative responsibilities. The Siebel database server installation script creates a Siebel administrator account that you can use to perform administrative tasks. The default user ID and password are SADMIN and SADMIN (case-sensitive). Your database administrator may also have created a user ID and password that allows you to access the Siebel Server and perform the required setup. To set up entities in the Group Administration view, you must be connected to the Siebel Server; you will not have full administrative capabilities for this view if you are connected to the local database or working in a mobile Web client.

NOTE: The responsibility for the SADMIN ID that comes with Siebel applications cannot be modified. However, you can copy this responsibility and modify the copy. For more information, see *Security Guide for Siebel eBusiness Applications*.

You can start Siebel applications from the Siebel Dedicated Web Client or from the Siebel Web Client. Instructions for both are described below.

TIP: If you have not yet entered any license keys, you must enter the first license key from the Siebel Dedicated Web Client or from Siebel Tools. For more information, see "Entering License Keys" on page 24.

To start a Siebel application from the Siebel Dedicated Web Client for the first time

1. From the Start menu, choose Programs and then choose your Siebel application.
2. Enter SADMIN in the User ID and Password fields.
3. In the Connect to field, choose the server database from the drop-down list and click OK.

   For information about the other databases available in the Connect to drop-down list, see "Selecting a Datasource" on page 30.

4. If a message tells you that there is no valid license key, click OK.

5 In the License Key dialog box, enter the Siebel eBusiness base application license key and click OK.

   For more information about license keys, see "Entering License Keys" on page 24. If you need to enter additional license keys, see "Entering an Additional License Key" on page 26.

To start a Siebel application from the Siebel Web Client for the first time

1. Open your Web browser.
2. Go to the URL for your Siebel Web Client.

   The login screen appears.

3. Enter SADMIN in the User ID and Password fields and click OK.

NOTE: If a message tells you that you have not been licensed for this feature, you must enter a valid license key, using either Siebel Tools or the Siebel Dedicated Web Client, before you can access the application. For more information, see "Entering License Keys" on page 24.

Entering License Keys

The Siebel license key is generated so that your organization's users can access the Siebel products that your organization has purchased. The license key is a series of numbers (up to 54 digits). Your organization’s specific license key is included in the Welcome Package. You must enter this license key before you begin to use the Siebel product, products, or optional modules that your organization has purchased. Because the license key resides in the database and not on the client machine, everyone who accesses the Siebel database uses the same license key.

Your license key activates the screens and views associated with the applications and modules that your organization has purchased. If you have been assigned multiple license keys, their effect is cumulative, as you enter them.

Customers upgrading from earlier versions of Siebel software may notice differences between the Siebel product and the products listed in the Welcome Package. These generally reflects changes in naming and bundling of Siebel products. For example, a functionality that was previously sold separately might now be bundled into a single product, or included in a base application, or simply have been renamed. It is recommended that you run the application itself to verify that all of the functionality that you expected is there.

Customers using Siebel products which are upgrades from earlier versions may notice differences between the views in the previous product and the views in the upgraded product. Reasons for this may include the following:

- The view you are looking for is not available from the application that you have launched.
- You logged in as a user who does not have responsibilities for the view. In order to evaluate all of the views available in the product, log in as a Siebel administrator.
- The method of accessing the functionality may have changed, or the functionality may have been replaced by more comprehensive features that work differently. Consult the *Siebel Bookshelf* for information on functionality changes in the latest release.
- The location or name of the screen or view may have changed. You can review the Site Map or consult the *Siebel Bookshelf* for information on current view locations.

However, if you do not see views that you expected, or if you see views that you did not expect, and feel that it impacts the functionality you have purchased, contact Siebel Technical Support as soon as possible. If your license key has expired, contact Siebel Technical Support.

Entering the First License Key

Before you enter the first license key, the following software must be correctly installed: Siebel Gateway Server, Siebel Server, Siebel Database Server, Siebel eBusiness Applications, and one of the following: Siebel Dedicated Web Client or Siebel Tools. After the first Siebel Dedicated Web Client or Siebel Tools installation, the first user to connect to the Siebel database is required to enter a license key in order to use the product.

To enter the first license key

1 Start either Siebel Dedicated Web Client or Siebel Tools.

NOTE: You have the choice of entering the first license key in either Siebel Dedicated Web Client or Siebel Tools. You can enter any Siebel license key in either Siebel Dedicated Web Client or Siebel Tools.

---

2 Log in as the system administrator and connect to the server database.

Use SADMIN as the login name and SADMIN as the password, and choose Server in the Connect to drop-down list.

NOTE: If you are the first to log in to Siebel Dedicated Web Client after a new Siebel installation, you will get the error message “There is no valid license key in the database.” If you are the first to log in to Siebel Tools after a new Siebel installation, you will get the error message “No valid license keys were found in the database.”

---

3 If you are logged in to Siebel Dedicated Web Client, click OK. If you are logged in to Siebel Tools, click Add Key.

4. In the License Key dialog box, enter the Siebel eBusiness base application license key or the Siebel Tools license key, and then click OK.

   CAUTION: Enter only a Siebel eBusiness base application license key or the Siebel Tools license key. If you enter an optional-module license key without having a Siebel eBusiness base application license key already entered, an error message will appear. The error occurs because the Home Page view is required to start Siebel eBusiness base applications, and Home Page views are not included in optional module license keys.

5. Close Siebel Dedicated Web Client or Siebel Tools, whichever you started in Step 1 on page 25.

6. Restart the Siebel Server System Service. (For more information, see *Siebel Server Administration Guide*.)

7. Start the Siebel application associated with the license key that you entered.

   For example, if your license key is for Siebel Sales, start Siebel Sales; if your license key is for Siebel Tools, start Siebel Tools.

NOTE: After entering the initial license key, if you discover that you made an error when entering the license key, you can correct the license key in the Key Value field in the Application Administration screen, License Key view.

Entering an Additional License Key

After entering the initial key, you can add or delete license keys through Siebel eBusiness Applications as long as your Siebel user responsibility includes the Siebel License Key view. You can do this immediately if your purchase included more than one license key, or you can add license keys as your organization purchases more Siebel applications or optional modules.

To enter an additional license key using a Siebel application

1. Start the Siebel application—for example, Siebel Call Center. You can use Siebel Web Client or Siebel Dedicated Web Client.

2. Log in as the system administrator and connect to the server database.

   Use SADMIN as the login name and SADMIN as the password, and choose Server in the Connect to drop-down list. If the system administrator's password has been changed, use the current password.

3. From the application-level menu, choose View > Site Map > Application Administration > License Keys.

4. Add the new license key:

   a. In the License Keys list, click New to create a new record.

   b. In the new record, enter one license key in the Key Value field.

   c. Repeat Step a and Step b for each license key to be entered.

5. Close the application.

6. Restart the Siebel Server System Service. (For more information, see *Siebel Server Administration Guide*.)

Start any Siebel application or module associated with a license key you have entered.

If you have any problems installing your license keys, contact Siebel Technical Support.

To enter an additional license key using Siebel Tools

1. Start Siebel Tools.

   NOTE: To enter additional license keys in Siebel Tools, you must have first entered the Siebel Tools license key.

   ---

2. Log in as the system administrator and connect to the server database.

   Use SADMIN as the login name and SADMIN as the password, and choose Server in the Connect to drop-down list. If the system administrator's password has been changed, use the current password.

3. Choose Help > Technical Support from the menu bar.

4. In the Technical Support Information dialog box, click License Key.
5. Add a license key:
   a. In the License Keys dialog box, click Add Key.
   b. In the new record, type in one license key and then click OK.
   c. Repeat Steps a and b for each license key to be entered.
6. Close Siebel Tools.
7. Restart the Siebel Server System Service. (For more information, see *Siebel Server Administration Guide*.)

Start any Siebel application or module associated with a license key you have entered.

License Key Fields

Table 5 describes the files in the license key record.

Table 5. Fields in the License Key Record

Field	Description
Key Value	The license key from your Welcome Package. Add a new record for each license key.
Status	Automatically entered based on the license key. OK means the license key has not expired. Expired means the license key has expired.
MaxUsers	Automatically entered based on the license key. The maximum number of concurrent users allowed in your license agreement with Siebel Systems.
Expires	Automatically entered based on the license key. The expiration date for the license key in your license agreement with Siebel Systems.

Hiding Access to License Keys

There are two ways that you can hide access to license keys: hiding the License Keys administrative view within Siebel applications and hiding the License Key button within Siebel Tools.

- **Within Siebel Applications.** You may want to hide the License Keys view in the Application Administration screen, in order to discourage unauthorized users from attempting to change license keys. To hide the License Keys view, remove it from the responsibility associated with the users who should not have access to it. Responsibilities control the views to which users have access. For more information about creating and modifying responsibilities, see *Security Guide for Siebel eBusiness Applications*.
- **Within Siebel Tools.** You may want to disable the License Key button, found in the Technical Support Information dialog box (available from the Siebel Tools Help menu), in order to discourage unauthorized users from attempting to change license keys. You can disable the License Key button by selecting the Siebel Administrator responsibility and deleting the Edit License Key view.

Selecting a Datasource

When you start a Siebel application from the Siebel Dedicated Web Client, you specify the datasource to which you want to connect.

The following databases are potentially available to administrators and end users:

- **Local.** Resides on your local computer. Can be synchronized with the corporate database. Typically stored on a laptop computer and used by mobile users who are not connected to a server when working.
- **Server.** This is your enterprise server database.
- **Sample.** A database of sample data, stored on your workstation. Using this database, you can experiment with a Siebel application without risk of damaging actual organizational data.

You should always perform system administration tasks against the server database. Although you can perform these tasks against your local database and synchronize, doing so has the potential to cause errors, including data conflicts. In addition, performance problems can result from a large local database, and from routing large numbers of transactions.

About the Sample Database

Siebel eBusiness Applications include a sample database to use in demonstrating, evaluating, or experimenting with the Siebel client and Siebel Tools. (For more information, see *Siebel Web Client Administration Guide*.)

The sample database includes a number of demo user accounts (SADMIN is one of these). Each of these has a predefined responsibility that reflects the demo user's position within the sample organization. If you log in to the sample database as a demo user, you can access certain views within Siebel eBusiness Applications based on the demo user's responsibility.

You do not need to install server components to run the Siebel sample database. However, you cannot access the Server Administration screen if the server component is not running. The sample database cannot be copied to the server data sources.

To log on as a demo user, double-click the icon for the listed application in the Siebel client program group. Applications listed as “Demo” automatically log the indicated user into the sample database. For the other applications, enter the user ID and password in the logon dialog box and choose Connect to: Sample. For more information about the sample database, including a list of demo users, see *Release Notes*.

The sample database that ships with the Siebel system has a built-in license key that includes access to all views and modules for a period of a year from the initial ship date of the product.

Seed Data

The enterprise database of your default Siebel application contains some built-in *seed data*, such as organization, division, position, responsibility, and employee records. You can use this seed data for training or testing, or as templates for the real data that you enter. For more information on seed data, including descriptions of seed data records, see *Security Guide for Siebel eBusiness Applications*.

Summary of Applications Administration Tasks

Table 6 summarizes the additional application administration tasks necessary to set up various Siebel eBusiness applications and optional modules.

Table 6. Application Administration Tasks

If You Want to	You (May) Need to Perform	For More Information, See
Use any base application (for example, Siebel Sales or Siebel Call Center)	Initial Setup tasks.	Chapter 2, "Initial Setup"
	Ongoing administration tasks.	Chapter 3, "Ongoing Application Administration Tasks"
Control access to views or data	Establish a strategy for controlling access to views and data: ■ Establish the business environment (such as organizations, divisions, territories) ■ Add employees ■ Assign responsibilities to employees	*Security Guide for Siebel eBusiness Applications*
Launch a global deployment	Locale and language administration tasks.	"Setting Up Locales" on page 43 "Setting Up Languages" on page 87 *Global Deployment Guide*
Manage global accounts	Account administration tasks: Set up global account hierarchies.	Chapter 10, "Global Accounts"
Use Application Services Interfaces (ASIs) for accounts, contacts, or households	Set up Web services and activate workflows for the ASIs.	Chapter 19, "Integration Using ASIs"
Create catalogs for data, including products	Create catalogs for products, literature, solutions and auctions.	*Siebel eSales Administration Guide*
Use Presentations, Proposals, and Correspondence functionality	Set up the Siebel Document Server, and create templates.	Chapter 16, "Proposals" Chapter 15, "Presentations" Chapter 14, "Correspondence"

Table 6. Application Administration Tasks

If You Want to	You (May) Need to Perform	For More Information, See
Manage content with Content Center	Set up a staging environment, set up content objects and workflows, and set up content types.	Chapter 8, "Content Center"
Manage a microsite	Microsite administration tasks.	Chapter 9, "Microsite Management"
Use the calendar to set up resources, such as conference rooms, equipment, and projectors	Calendar administration tasks.	Chapter 13, "Calendar"
Use Assignment Manager to automatically assign tasks to appropriate users	Create skills and other criteria.	*Siebel Assignment Manager Administration Guide*
Use Siebel Marketing	Marketing administration tasks.	*Siebel Marketing Guide*
Manage lists of contacts and prospects	List Management tasks.	*Siebel Marketing Guide*
Use Competency Management System	Skills and competencies administration tasks *Note:* These are different skills than those used by Assignment Manager.	*Siebel Employee Relationship Management Administration Guide*
Use Time Sheets and Expense Reports	Time Sheet and Expense Report setup tasks, such as creating work types.	*Siebel Professional Services Automation Guide*
Manage Service schedules, Service Assets, Warranties	Service administration tasks.	*Siebel Field Service Guide*
Manage quotas and employee or partner incentive compensation	Incentive compensation administration tasks.	*Siebel Incentive Compensation Administration Guide*
Manage orders and the order process	Order administration tasks.	*Siebel Order Management Guide*

2 Initial Setup

Once your Siebel products are successfully installed, you need to perform a number of tasks to set up and administer the application.

Initial setup tasks are those which must be completed in order for your Siebel applications to work correctly, and then may be done infrequently, for instance, as your company grows.

Ongoing tasks are done on an occasional or ongoing basis, and are described in Chapter 3, “Ongoing Application Administration Tasks.”

Summary of Initial Setup Tasks

Table 7 summarizes the initial setup tasks and the order in which you should perform them.

Table 7. Required Tasks During Setup

Task	Comments
Add any custom views.	Custom views are created in Siebel Tools and must be added to your Siebel application. Custom views should be added to the Views view before you define responsibilities. For information about adding views, see "Adding Views to the Application" on page 38. For information about creating custom views and about troubleshooting view visibility issues, see *Siebel Tools Reference*.
Determine access control strategy and define business environment structure.	Siebel applications can be set up to support many strategies for your company to control access to views and data. These strategies include methods such as defining your business environment structure (organizations, internal and external divisions, and so on), defining employee positions, and creating access groups so that specific groups of people have access to specific views and data. These decisions should be made early in the deployment process, so that the strategy can be implemented during the initial setup. For more information about controlling access to views and data, and the procedures for implementing access control, see *Security Guide for Siebel eBusiness Applications*.
Enter employee records into system (database and application) and determine employee access to views and data.	Enter employee records after you have defined your business environment structure. You will need to assign at least one responsibility to each employee, and you may also assign organizations, positions, or other access control parameters. For more information about entering or deactivating employee records, see *Security Guide for Siebel eBusiness Applications*.

Table 7. Required Tasks During Setup

Task	Comments
Complete employee setup.	For information about associating additional information to an employee record, see "Completing Employee Setup" on page 39.
Set up locales.	Locale Codes and parameters are necessary for a global deployment. For more information, see "Setting Up Locales" on page 43.

Adding Views to the Application

Developers create new views through Siebel Tools. In order for the views to become available for administrators to work with, you must add them to the Views screen in the application before you define your business environment.

Example: You want to add an Opportunities view in the Reference screen. In Siebel Tools, you create the view and name it Reference Opportunities. (For details on creating views, see *Siebel Tools Reference*.) In your Siebel application, you follow the steps below and add the Reference Opportunities view in the View Administration view. After it has been added in both places, the view can be made accessible to the appropriate users. For details about controlling visibility to views, see *Security Guide for Siebel eBusiness Applications*.

To add customized views to the Siebel application

1. From the application-level menu, choose View > Site Map > Application Administration > Views.
2. In the Views list, add a new record.
3. Enter the view name exactly as it is defined in Siebel Tools, and a description of the new view.

You generally do not need to modify or delete views that are already listed. You would only need to modify a view if its name was changed in Siebel Tools. A view would need to be deleted only if it no longer existed in the data model schema, or if you did not want anyone to have access to it. Instead of deleting views, administrators should remove the views from responsibilities and keep them in the database.

NOTE: Only visibility-level views can be configured to appear in the Site Map. For more information, see *Siebel Tools Reference*.

Completing Employee Setup

After completing the employee setup procedures described in the *Security Guide for Siebel eBusiness Applications*, which are required to allow employee access to the Siebel application, views and data, you complete employee setup by providing additional information. This can include the following:

- **Assignment Rules.** Allows you to see and administer the assignment rules for an employee. For more information on assignment rules, see *Siebel Assignment Manager Administration Guide*.

  NOTE: You must be logged on to a server database to use the Employee Assignment Rules view.

- **Availability.** Used for Siebel Professional Services Automation. Lists the projects for which an employee is on staff, or for which an employee has been requested. For more information, see *Siebel Professional Services Automation Guide*.

  NOTE: Employees can also change their availability in the Availability view on the User Preferences screen. The fields Current Status, Until, and Next Status are for information only; there is no associated logic.

- **Exception Hours.** Specifies what days and hours an employee is not available.
- **Utilization.** Displays a chart with the monthly and quarterly utilization of the currently selected employee. Managers use this chart for monitoring professional services projects and employees. For more information about professional services, see *Siebel Professional Services Automation Guide*.
- **Tools.** Defines the tools that field service engineers carry with them or have access to. It allows a call center person to check whether the engineers have the correct tools for the jobs they are assigned to.
- **Job Information.** Specifies the job profile, salary, compensation ratio, pay currency, and location of employee.
- **Calendar administration.** Defines the calendar properties and access for an employee. For more information about Calendar administration, see Chapter 13, "Calendar."

- **Assignment Skills.** Defines an employee's skills and skill items, along with their level of expertise. Skills can be used as assignment criteria in Siebel Assignment Manager. For more information about how the Siebel application uses skills, see *Siebel Assignment Manager Administration Guide*.

  Skills can also be used in the Professional Service Automation product for managing resources. For information about these types of skills, see *Siebel Professional Services Automation Guide*.

- **Employee Query.** Allows queries to identify employees with particular skills and expertise.
- **Service Details.** Provides details about the shift start and end locations, hourly costs, overtime availability and other details for a service employee.
- **Competency.** Provides a list of areas in which the employee has some demonstrated level of knowledge or accomplishment.
- **Education.** Provides details of an employee's education history.
- **Past Work Experience.** Provides details of an employee's work history.
- **Honor/Award.** Provides list of honors and awards earned by an employee.
- **Membership.** Provides details of an employee's memberships in various organizations.
- **Certification.** Provides details of an employee's certification.

To complete the employee setup

1. From the application-level menu, choose View > Site Map > User Administration > Employees.
2. In the Employees list, select the employee for whom you want to add additional information.

3 In the More Information form complete any necessary fields. Some of the fields are described in the following table.

Field	Description
Configuration	Specifies which Siebel product or group of software components to associate with the currently selected employee. For more information, see *Siebel Anywhere Administration Guide*.
Available Until	May be used to indicate the active period of an employee. Used in conjunction with the Availability, Overtime Availability, and Next Available fields.

4 Click any other appropriate view tab.

5 Add a new record, if needed.

6 Enter the appropriate information.

Assigning Skills

At the levels of organizations, positions, and employees, you can add skills. Skills are used for assigning employees to certain projects, service requests, and so on. Skills added to an organization apply to all employees assigned to that organization. Skills assigned to a position apply only to the employee assigned to that position. You create skills with Siebel Tools.

Employees can track and update their own skill profiles in the User Preferences Profile view.

For more information about how your Siebel application uses skills, see *Siebel Assignment Manager Administration Guide*.

Setting Up Locales

A locale is a set of rules guiding how common data is displayed to the user or received from the user. These rules are used to format data from a database before displaying the resulting information in output fields on the user interface. Siebel applications support language and geographical conventions for the display language of picklists, and formatting of data such as dates, time, numbers, and currency based on locale settings.

The Locale information is stored in the Locale Table (S_LOCALE). The data in this table is maintained by the administrator using the Locale Administration view.

The locale with which the Component Object Manager processes are initialized is determined by the value of the parameter Locale Code. Although this is set during installation, it may be changed to the locale code of any locale that is preconfigured with the Siebel application or added by the administrator. The Locale Code parameter can be set at the Enterprise, Server, or Component level.

A number of locales and their parameters come prebuilt with the standard Siebel application. You can also create and revise locales in the Locale Administration view.

After a locale and its parameters are defined, you can create translations for locale names that will display in the locale pick applet, rather than the three letter acronym locale code. For example, instead of showing ENU as locale name, the administrator provides *English–United States* as a translation for English speakers and *Inglese–Stati Uniti d'America* for Italian speakers. Only translated locale names are exposed to end-users on locale pick applets.

NOTE: Whereas the Siebel Web Clients use the locale settings specified in the Locale Administration view, the Siebel Mobile Web Client and the Siebel Dedicated Web Client use the locale settings defined in the client operating system's regional settings. [

To create a locale

1. From the application-level menu, choose View > Site Map > Application Administration > Locale.

2 In the Locale list, create a new record and fill in the necessary fields.

Some of the fields are described in the following table.

Field	Description
Date Separator	Designates the symbol that will be used to separate the components of the date.
International Dialing Code	Designates the country codes to display in phone numbers, suppressing the country code for phone numbers that are in the user's locale. For example, if the phone numbers for two accounts are the following: ■ +33 1-23 42 34 56, for an account based in France (+33 is the country code for France) ■ +1 6502955000, for an account based in the U.S. (+1 is the country code for the U.S.) To a user based in the U.S.(locale ENU) the International Dialing Code value is "USA and Canada (1)", and the above phone numbers will display as: ■ +33 1-23 42 34 56 ■ (650) 295-5000
List Separator	Designates the symbol that will be used to separate consecutive numbers in a list. For example: ■ In the U.S., consecutive numbers are separated by a comma: 1.23,3.57,4.01 ■ In France, consecutive numbers are separated by a semi-colon: 1,23;3,57;4,01
Locale Code	Siebel applications use the three letter acronym (TLA) code conventions of Microsoft for locale name. In most cases, the TLA is created by taking the two-letter language abbreviation from the ISO Standard 639 and adding a third letter as appropriate to form a unique identifier. For information on Microsoft codes, see your Microsoft documentation.

Field	Description
Locale Name	The naming convention is generally *Language Name–Territory*, for example, English–United States, English–United Kingdom, or French–France.
Long Date Format	Not supported.
Negative Currency Format	Specifies the location of the negative sign (-) with respect to the currency symbols and digits (100). For example: ■ For U.S. format, ($32.45), select (s100) ■ For British format, -£32.40, select -s100
Number Decimal Separator	Specifies the symbol used to indicate the decimal place. For example: ■ French format: 1 234,34 (comma as decimal symbol) ■ U.S. format: 1,234.34 (period as decimal symbol)
Number Fractional Digits	Designates the number of digits after the decimal separator. For example, the number 12.340 has a number fractional of 3. This applies to data fields of type DTYPE_NUMBER.
Number Grouping Separator	Designates the symbol used to group numbers. For example: ■ French format: 1 234 (space as number grouping separator) ■ German format: 1.234 (period as number grouping separator) ■ U.S. format: 1,234 (comma as number grouping separator)
Number Leading Zero	Designates whether to display a leading zero in numbers less than one. For example, .7 or 0.7.
Positive Currency Format	Specifies the location of the currency symbols with respect to the digits (100). For example: for U.S. format, $32.45, select s100.

<table>
<thead>
<tr><th>Field</th><th>Description</th></tr>
</thead>
<tbody>
<tr><td>Short Date Format</td><td>Specifies the appropriate shortened date format.

For example:

■ International format: yymmdd
■ U.S. format: mm/dd/yy
■ German format: dd.mm.yy

The forward slash in the string mm/dd/yy is actually a place holder. It is replaced with the symbol specified in the Date Separator field. For example, if the Date Separator value is a dash, -, then April 10, 2002 will be displayed as 04-10-2002.

Note: If you enter a month number greater than 12, it defaults to 12. If you enter a day number greater than the number of days in the month, it defaults to the last day of the month. For example, if you enter 42/99/03 (U.S. format), the date defaults to 12/31/03.</td></tr>
<tr><td>Time AM Designator</td><td>Specifies the symbol for designating time between 00:00 and 12:00.

For example: AM, a.m., am</td></tr>
<tr><td>Time Leading Zero</td><td>Designates whether to display a leading zero in time fields. For example:

12 hour clock with leading zero: 01:03 AM, 01:03 PM

12 hour clock without leading zero: 1:03 AM, 1:03 PM

24 hour clock with leading zero: 01:03, 13:03

24 hour clock without leading zero: 1:03, 13:03</td></tr>
<tr><td>Time PM Designator</td><td>Specifies the symbol for designating time between 12:00 and 24:00.

For example: PM, p.m., or pm</td></tr>
<tr><td>Time Separator</td><td>Specifies the symbol used to separate the hours from the minutes.</td></tr>
<tr><td>UI Directionality</td><td>Designates the direction of the text displayed.</td></tr>
</tbody>
</table>

To create a translation for a locale name

1. From the application-level menu, choose View > Site Map > Applications Administration > Locale, and select the appropriate record.
2. Click the Locale Name Translation view tab.
3. On the Locale Name Translation list, create a new record and fill in the necessary fields, as described in the following table.

Field	Description
Language	Designates the language code of the translation of the locale name. For examples of language codes, see *Global Deployment Guide*.
Translated Name	The exact translation of the locale name to appear in the picklist for users with the designated language code. For example, for the locale English–United States: ■ With ENU language code, the locale name is English–United States. ■ With ITA language code, the locale name is Inglese–Stati Uniti d’America.
Description	Translated description of this locale.

To edit the current locale

1. Edit the locale record. (See “To create a locale” on page 43.)
2. To have the edits take effect, restart the Application Object Manager.

   (For more information about shutting down and starting an unassigned component such as an Application Object Manager, see *Siebel Server Administration Guide*.)

Setting Up Satmetrix Survey Reports

NOTE: This section only applies to those who have purchased Siebel Satmetrix eSurveys or who have purchased surveys directly from Satmetrix Systems.

In order to view Satmetrix survey reports through your Siebel application, you need to:

- Add the Account Satmetrix Survey View view to the appropriate user responsibilities. For information about how to add views to responsibilities, see *Security Guide for Siebel eBusiness Applications*.
- Enter the secret key string provided by Satmetrix Systems into the Satmetrix Key Value system preference. For information about how to change system preferences, see Chapter 3, “Ongoing Application Administration Tasks.”
- Extend the List of Values for WI_ARG_TYPE as described in “To extend the List of Values for WI_ARG_TYPE.”
- Set up the symbolic URL for access to the Satmetrix reports server, as described in “To set up the symbolic URL for access to Satmetrix Reports.”

To extend the List of Values for WI_ARG_TYPE

1. From the application-level menu, choose View > Site Map > Application Administration > List of Values.

2 Create a new record, and complete the fields as shown in the following table.

Field	Value
Type	WI_ARG_TYPE
Display Value	Satmetrix
Language-Independent Code	Satmetrix
Active	Yes
Translate	Yes
Replication Level	All

For more information about adding List of Values records, see Chapter 4, “Working with Lists of Values.”

To set up the symbolic URL for access to Satmetrix Reports

1 From the application-level menu, choose View > Site Map > Integration Administration > Symbolic URL Administration.

2 In the Symbolic URL list, select SatmetrixSurvey.

3 Make sure the URL is the URL for the reports server provided by Satmetrix Systems.

4 In the Symbolic URL Arguments list, complete the fields, using the following table as a guide.

Name	Required Argument	Argument Type	Argument Value	Append as Argument	Sequence
EncodeUrl	Yes	Command	FALSE	Yes	1
version	Yes	Constant	*Obtain from Satmetrix*	Yes	2
windowsize	Yes	Command	WebControl width = 1000 height = 500 border = 1	Yes	3

Name	Required Argument	Argument Type	Argument Value	Append as Argument	Sequence
type	Yes	Constant	acct	Yes	4
acctid	Yes	Field	Id	Yes	5
acctname	Yes	Field	Name	Yes	6
contactid	Yes	Constant	*	Yes	7
contactname	Yes	Constant	*	Yes	8
user	Yes	Profile Attribute	Login Name	Yes	9
domain	Yes	Constant	*Obtain from Satmetrix*	Yes	10
model	Yes	Constant	*Obtain from Satmetrix*	Yes	11
created	Yes	Field	Timestamp	Yes	12
token	No	Satmetrix	Satmetrix Surveys, CalculateToken	Yes	13

Ongoing Application Administration Tasks 3

This chapter assumes that you have successfully installed your Siebel product and have completed the tasks in Chapter 2, “Initial Setup.”

The tasks described in this chapter set up defaults that are used throughout your Siebel application. For some implementations, the default settings provided through the seed data meet a company’s needs without customization. In other cases, administrators find it useful to make adjustments to these defaults.

Setting System Preferences

System preferences control how Siebel applications operate in your environment. You need to review default settings and modify these as appropriate for your environment.

For a list of the system preferences in Siebel applications, see Appendix A, "System Preferences."

To set system preferences

1. From the application-level menu, choose View > Site Map > Application Administration > System Preferences.
2. Check that the default System Preference Values are correct in your environment, or change values for system preferences as needed.

Setting Up Predefined Queries

Predefined queries (PDQ) automate queries that a user can perform online. Rather than creating a query, entering criteria, and running the query, the user selects a PDQ from the Queries drop-down list.

Predefined queries can be private (available only to the person who created them) or they can be public (available to all the users of the application).

Both public and private predefined and user-defined queries are stored in the database table S_APP_QUERY.

There are two ways to set up predefined queries:

- Create and execute a query in the usual way, and then save the query.
- Create or modify a predefined query in the Predefined Query screen.

For more information about the syntax of Siebel queries, see *Fundamentals* and *Siebel Tools Reference*.

When setting up queries, remember:

- The Administrator can define a PDQ using both displayed and nondisplayed fields.
- You can reference only fields from the current applet's business component in your query.
- On occasion, using the wildcard * to find all entries in a field may cause a performance problem. If it does, use IS NOT NULL instead. For more information about query operators, see *Siebel Online Help*.
- Predefined queries are defined on a business object. All screens based on the same business object will display all the predefined queries created for that business object.

- Do not query on fields of Siebel field data type DTYPE_NOTE.

NOTE: In the preconfigured application, the records shown on the application home page are determined by the predefined query Default, which is performed on the object WebCallCenter Home.

To create a predefined query by saving a query

1. Navigate to the screen where you will run the query.
2. Click the Query button in the applet title bar or select New Query from the applet drop-down menu.
3. In the applet that is displayed, enter the criteria for the new query.
4. Click the Go button and then click Run Query.

   The query's results appear.
5. From the application-level menu, choose Edit > Query > Save As.
6. In the Save Query As dialog box, enter a name for the query, and click OK.

   The query is added to your list of predefined queries. This query is private, and only you can view it.
7. If you want to make the query public:
   a. From the application-level menu, choose View > Site Map > Application Administration > Predefined Queries.
   b. In the Predefined Queries list, deselect the Private field in the record for the query you just created.

To set up a predefined query in the Predefined Query view

1. From the application-level menu, choose View > Site Map > Application Administration > Predefined Queries.

2 In the Predefined Queries list, add a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Name	This is the name that appears in the predefined query drop-down list.
Object	The object upon which the query is performed.
Private	Marked if the query is available only to the person who created it. When you unmark a query to make it public, the other users must first exit the application and reenter before they can see the newly public query.
Query	The SQL code for the query. When you create a query for a field that is a multi-value group, you can use the EXISTS operator to query nonprimary child records.
Cache Result	If this is Y, the query returns all rows up to the value of the DSMaxFetchArraySize parameter set for the data source. For information about setting DSMaxFetchArraySize, see about modifying Named Subsystems in the *Siebel Server Administration Guide*. *Note:* Setting DSMaxFetchArraySize to -1 and Cache Result to Y may cause memory problems for queries returning many rows.

About Multi-Value Group Queries in Siebel Industry Applications

In Siebel Industry Applications, the default behavior of queries in Multi-Value Group (MVG) fields is set to automatically add an EXISTS statement to every MVG query. This allows detailed cross-business object queries, such as the following example from Siebel Pharma:

- Find all the Contacts
- Who are ranked High in a specific therapeutic class
- Who have not been visited for over a month by any sales representative
- With a best time to call on Monday afternoon

This MVG behavior, however, also prevents the following query in an MVG field:

EXISTS (A) AND EXISTS (B).

To disable the EXISTS statement

- Set the Default MVG Exists Query system preference to FALSE.

  For more information about changing system preferences, see "Setting System Preferences" on page 52.

Setting Up Currencies

You specify the currencies your company uses by:

- **Making Currencies Active.** If the application includes the currency definitions you need, you make these currencies active.
- **Defining Currencies.** If you need additional currencies whose definitions the application does not include, you must also define these currencies.

NOTE: If you use multiple currencies, you must also set up exchange rates before you import data that contains foreign currencies and before you use any of the Siebel currency features.

Making Currencies Active

The application includes more than 30 currency definitions. If your currency is one of these, you need only mark it as active.

To make currencies active

1. From the application-level menu, choose View > Site Map > Applications Administration > Currencies.
2. For any currency that you want to make active, click the Active column in the Currencies list.
3. Enter the Start Date and End Date in the More Info form, to specify the date when this currency becomes active and the date when it is no longer active. This step is optional.

Defining Currencies

If your company uses any currencies that the application does not include, you must define them and mark them as active.

If you modify the definition of currencies, you must reconnect to the application before the modification becomes visible in other screens or in clear cache. For more information about clear cache, see "Clearing the Cache" on page 104.

You cannot delete a currency once you have defined it. If you no longer use it, you can mark it as inactive.

To define a currency

1. From the application-level menu, choose View > Site Map > Applications Administration > Currencies.
2. In the More Info form, add a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Code	A three-letter code for the currency.
Name	The name of the currency.
Issuing Country	The country that issues the currency.
Symbol	The symbol for the currency, such as $.
Scale	The number of places after the decimal used for displaying currency in the interface. For example, U.S. Dollars has a scale of 2 to accommodate the cents, so an amount would be displayed as $10.50. If the scale were 1, this same amount would be displayed as $10.5.
Smallest Denomination	The smallest unit of currency available. For instance, the smallest unit of currency for the U.S. Dollar is one cent, or .01 dollars. If there were no cents, the scale would still be 2, but the smallest denomination would be $0.05.
EMU Triangulation	Check to indicate that this currency must be converted to other checked currencies using the EMU Triangulation method.
Active	Indicates whether or not the currency can be chosen by the end user.
Start Date	The date when the currency becomes active.

Field	Comments
End Date	The date when the currency is no longer active.
Extended Scale	The number of places after the decimal used for storing currency data in the database. If the values in the Extended Scale and Scale fields are different, results of currency calculations, for instance conversions or discounts, may be different than expected. This is because the currency values that are stored in the database are used for these calculations, rather than the displayed values.

Setting Up Currency Conversion

This section discusses how to set up exchange rates and includes related background information. It includes the following topics:

- **Setting Up Exchange Rates.** You must set up exchange rates used to convert currencies.
- **Understanding the Euro and Triangulation.** If a currency is part of the European Monetary Union, you convert it to other currencies through the Euro.
- **Currency Conversion Functionality.** The currency conversion rates that you set up are used by a number of features of Siebel applications.

Setting Up Exchange Rates

After you have set up your currencies, but before you use any currency features or import data with foreign currencies, you must set up exchange rates that are used to convert currencies.

If you fail to set up an exchange rate, currency will be converted on a 1:1 basis. This means that the amount stays the same but the currency symbol changes.

NOTE: To calculate exchanges between currencies, you must set up an exchange rate twice—one for each currency. For instance, if you want to calculate exchange rates between U.S. dollars and Japanese yen, you must set up an exchange rate for yen to dollars, and set up another rate for dollars to yen.

To set up exchange rates

1. From the application-level menu, choose View > Site Map > Applications Administration > Currencies.
2. In the Currencies list, select the currency for which you want to establish exchange rates.
3. Click the Exchange Rates view tab.

4 In the Exchange Rates list, add a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Type	Currently, Daily is the only type used.
To Currency	The currency to which you are converting the currency selected in the currencies list.
Exchange Rate	The conversion rate.
Exchange Date	The date of this conversion rate. When converting currencies, Siebel applications use the exchange rate whose date is closest to, but not past, the date of the transaction. Depending on the accuracy that you need and on how much currency values are fluctuating, you may want to enter a new exchange rate every week, month, quarter, or year. Siebel applications use the Exchange Date only to convert currencies in transactions in which money has been or will be received. For example, Quote Item Price has an Exchange Date field, because it represents money that your company will receive, and your sales representatives should enter the date when the money will be received.

Repeat this process to add additional exchange rates.

You must restart the Siebel client or use the clear cache command before any changes to exchange rates can be seen in your Siebel application. For more information about clearing the cache, see "Clearing the Cache" on page 104.

The Euro and Triangulation

NOTE: As of January 2002, the Euro Triangulation method for converting between currencies belonging to EMU members is not needed for present and future currency exchanges. However, the method is still available in Siebel applications, as are the old currencies, so that historical data can be maintained accurately. The following description applies only to historical data needing conversion prior to the 2002 switchover to the Euro for the EMU member countries.

If a country is a member of the European Monetary Union (EMU), you should convert its currency to other currencies through the Euro. This is called triangulation, and it is used whenever either currency being converted has EMU Triangulation checked.

For example, if you are converting from USD to DEM and DEM has EMU Triangulation checked, you must set up the conversion rates between US dollars and the Euro and between the Euro and US dollars. You do not have to check the EMU Triangulation field for USD. The DEM will be converted to EUR according to the fixed exchange rate set by the European Monetary Union, and then the amount in EUR will be converted to USD according the exchange rate you set up.

The EMU Triangulation field is already checked for the following European Monetary Union member nations: Germany (DEM), Belgium (BEF), Spain (ESP), France (FRF), Ireland (IEP), Italy (ITL), Netherlands (NLG), Austria (ATS), Portugal (PTE), Finland (FIM), and Luxembourg (LUF). However, you can check or clear this field. For instance, if the United Kingdom or Sweden joins the EMU, then you can check the field for that currency.

To calculate triangulation conversion, the conversion rate is always expressed to six significant figures. Conversions from one national currency unit into another are made by:

1. Converting the monetary amount from the national currency unit into the Euro.
2. Rounding the result to not less than three decimal places.
3. Converting the result to the target national currency.
4. Rounding the result to the lowest subunit of the target national currency, such as pfennig for the German mark or centime for the French franc.

NOTE: The EMU Triangulation field should be checked only for currencies that are subdivisions of the Euro.

Currency Conversion Functionality

Currency conversions currently occur in your Siebel application in various features. Some examples follow:

- **Quotes.** When you change the currency code of a quote, it will convert the discount amounts and discount prices.
- **Forecasting.** When you update forecast information from the opportunity, it will do a currency conversion from the opportunity currency to the forecast currency if the currencies are different. When you roll up the forecast lines, it will do a conversion from the forecast line currency to the rollup forecast currency if the currencies are different.
- **Rate lists.** When you change the currency code of a rate list, it will prompt you for an exchange date and convert the prices of all of the price list items.
- **Reports.** Here are some examples of reports that support currency conversion:
  - **Opportunity Pipeline Report by Rep.** Opportunity revenues created in different currencies will be converted in the Total and Subtotal fields to the user's default currency.
  - **Euro Expense Report.** If expenses have been created in an EMU currency, all expenses will be displayed in dual currencies.
  - **Project Limit Summary Report.**
  - **Forecasting Reports.**
  - **Current Quotes Report.**
- **Charts.** The following charts support currency conversion:
  - **Opportunity Current Opportunity Analysis.** Opportunity revenue will be converted to the user's default currency if both the opportunity currency and the revenue currency are different from the user's default currency.
  - **Forecast Analysis.**

Setting Up Expense Types

When employees create expense reports, they choose an expense type for each line item in the report. For examples, when employees travel on business, they might have to enter line items with expense types *Food*, *Airfare*, *Car Rental*, *Hotel*, and so on.

When you set up expense types, you specify what expense types are available to employees in the drop-down list that they use to choose expense types. You also specify how these expense types will be categorized and summarized in expense reports.

You can also create establishments that are associated with these expense types. For example, if the expense type is *Airfare*, you might associate establishments with it such as *Air Canada* and *British Airways*. For more information about associating expense types with establishments, see *Siebel Professional Services Automation Guide*.

NOTE: Before you can add expense types and establishments, you must add them in the List of Values Administration screen so that they can be displayed in the drop-down list. Add expense types under EXP_ITEM_TYPE, and add establishments under EXP_ITEM_ESTAB. When you add the expense types and establishments in the Expense Type screen, make sure they are identical to those in the List of Values Administration screen. For more details about List of Values administration, see Chapter 4, “Working with Lists of Values.”

To set up expense types

1. From the application-level menu, choose View > Site Map > Applications Administration > Expense Types.

2 In the Expense Types list, add a new record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Expense Type	Enter the expense type that the employee will choose in the Expense Type drop-down list of expense report line items, such as Airfare.
Report Category	Enter a category for this expense type. This category will be used in summary reports, such as Air/Rail Fare.
Summary	Enter a larger summary category for this expense type, such as Travel Cost. This summary category will be used in summary reports.

Setting Up Payment Terms

Payment terms are the different terms that you offer to your customers, such as Net 30 days and Net 60 days. You set up payment terms so that they are available in your Siebel application, for example in the Quotes screen.

To set up a payment term

1. From the application-level menu, choose View > Site Map > Applications Administration > Payment Terms.
2. In the Payment Terms list, add a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Payment Term	Enter a name for the payment term, such as Net 30.
Net Days	If the payment term requires payment in a specific number of days after the order date, enter the number of days. Optional
Description	Enter a description of the payment term. Optional.
Discount	If there is a discount for early payment, enter the amount of the discount. Optional.
Discount Days	If there is a discount for early payment, enter the number of days within which a customer must pay to qualify for the discount. Optional.
Due	If there is a specific due date for payment, enter the due date. Optional.
Integration ID	Users should not modify this system field. It is a cross-reference that links the Siebel application to corresponding payment term information in the back-office application.

Setting Up Periods

Periods are time periods that are used in your business, such as Q1 2002 or Jan 2001. Periods are used extensively in the Siebel application, such as in forecasting, time sheets, incentive compensation, and expense reports.

Be sure to set up periods far enough into the future that forecasting will work. For example, the default forecast is for seven months ahead. Therefore, if you keep this default, you must create periods defined for at least seven months from the current date for forecasting to work correctly.

After setting up a period, you can associate Period Units with it. Period Units allow you to define one time unit in terms of another. For example, day periods can be associated with week periods for use in Timesheets. When a new timesheet is created, based on a week period, each day in that week is also added to the timesheet. This functionality requires the day periods to be associated as Period Units with the week period.

To set up periods

1. From the application-level menu, choose View > Site Map > Applications Administration > Periods.
2. In the Period Definition list, add a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Period	Enter a name for the period, such as Q1 2001.
Closed	Select this to indicate that the period has already closed.
Start	Enter the start date for the period.
End	Enter the end date for the period.
Type	Select the type of period, such as month, quarter, or year.
Description	Enter a description of the period. For example, this text appears in the column headers of the Line Items list in the Time Sheet screen, Line Items view.

To associate period units with a period

1. From the application-level menu, choose View > Site Map > Applications Administration > Periods, and select the appropriate period.
2. In the Period Units list, click New.
3. In the Period Units dialog box, select all the period units to associate with this period, and then click OK.

Specifying Telephone Formats

Default telephone formats are specified in the List of Values view. You can only have one default telephone number format per country. The default format is applied when you enter only numbers, without slashes, dashes, or other formatting symbols.

Before users enter telephone numbers:

- Set the default country. See "Setting Up Locales" on page 43. The default phone format is determined by the locale setting.
- Define formats for countries outside the default country. See "Specifying Non-North American Telephone Formats" on page 70.

If a user enters a telephone number from a country for which the format has not yet been specified, the telephone number may be formatted incorrectly.

NOTE: If you define any new telephone formats, coordinate with communications administrators who specify CTI functionality and define dialing filters. For more information, see *Siebel Communications Server Administration Guide*.

North American Telephone Formats

The default format for North American telephone numbers is (000) 000-0000. The telephone formatting logic for North American telephone numbers works as follows:

- If the user enters 10 digits in a telephone number field, it is formatted as (123) 123-1234.
- If the user enters more than 10 digits, the first 10 digits are formatted as (123) 123-1234, and the rest of the digits are used as the extension number. The user can enter up to 40 digits.
- If the user enters fewer than 10 digits, an error message appears.
- If the user begins the telephone number with a leading zero, an error message appears.

This telephone formatting logic is followed even when the default country is not in North America.

Specifying Non-North American Telephone Formats

If your users need to enter telephone numbers for countries outside North America, you must specify telephone number formats for those countries.

To specify non-North American telephone formats

1. Choose View > Site Map > Application Administration > List of Values.
2. Query the Type field for the entry PHONE_FORMAT to see existing telephone formats.
3. Add a new record and complete the necessary fields.

   Some fields are described in the following table. For more field information, see Chapter 4, “Working with Lists of Values.”

Field	Comments
Display Value	Enter the format string.
Language-Independent Code	Use the number zero (0) to represent required digits, the character # to represent optional digits, and other formatting characters to represent how the telephone number should appear. Do not include any alphanumeric characters other than 0. For example, to format an Australian phone number, which includes a two-digit area code and a six- or eight-digit number, use (00) 000# 000#. You do not need to include characters to represent the country code in the format. When a user enters a number, the country code is automatically shown if the default country is different from the country code. The maximum number of digits allowed in the format is 12. Any digits beyond 12 are used as the extension number. For example, even if the format is 000-000-0000-0000, 14 digits entered as 12345678901234 display as 123-456-7890-12x34.

Field	Comments
Order	Enter the country code of the new format.
Type	Enter PHONE_FORMAT or choose it in the drop-down list.

4 Follow the instructions in "Clearing the Cache" on page 104.

International Telephone Formats

To enter an international telephone number (a telephone number for a country other than the current default country) in a telephone field, the user must specify the country by preceding the telephone number with a plus sign (+) followed by the country code (for example, +44). If the user does not enter a country code, the default country code is assumed.

After the user indicates the country by entering the plus sign and country code, the telephone formatting logic for international telephone numbers works as follows:

- If the user enters exactly the same number of digits in a telephone number field as there are in the telephone format for the indicated country, the entry is formatted as specified.
- If the user enters more than the number of digits in the telephone format for the indicated country, the first digits are formatted as specified and the rest of the digits are used as an extension number. The user can enter up to 40 digits.
- If the user enters fewer than the number of digits in the telephone format for indicated country, the entry is accepted without an error message. (This is to accommodate telephone numbers of different lengths.)
- If there is no List of Values telephone format entry for the indicated country, the number is accepted, but not formatted. No error message is returned.

Unformatted Telephone Numbers

When you change or add a telephone number format, the existing telephone numbers are *not* updated automatically.

CAUTION: When entering telephone numbers, users can enter letters in place of digits, but computer telephony integration (CTI) features, such as outbound dialing, do not work for these numbers. Queries for such numbers must include the letters, not the numeric equivalents. Siebel eBusiness Applications do not detect or warn users if they enter Q or Z (letters that do not appear on all telephones).

Examples

Table 8 shows how telephone numbers would appear under various circumstances. In this example, the default country is the United States and the default format is the North American format, (000) 000-0000. Another format has been entered for England (country code 44): 00.000-000.

Table 8. Telephone Number Format Examples

User Enters	Number Is Formatted As
1234567890	(123) 456-7890
1234567890123	(123) 456-7890 x123
123456	Error message: “Invalid data has been entered.”
+4412345678	+44 12.345-678
+441234567890	+44 12.345-678 x90
+4412345	+44 12345
+2512345	+2512345
?0+4412345678	?0+4412345678 (you see the ‘?’ and the ‘0’)
?0HelloWorld	?0HelloWorld (you see the ‘?’ and the ‘0’)

The telephone format has no effect on sort order.

When performing a query on a telephone number, do not include any format characters such as (,), -, ., x, or spaces.

You can query for only country 61 by typing +61* but you cannot query for only North American telephone numbers this way, because +1* returns all telephone numbers. To query for North American telephone numbers, use `not like +*` instead.

Table 9 gives examples of how to query telephone numbers.

Table 9. Querying Telephone Numbers

Desired Query Result	Query Criteria
(123) 456-7890	1234567890
+61 (123) 45.67.89 x0	+611234567890 (if 61 is defined as a country code)
Country code 61 telephone numbers	+61*
All telephone numbers	+1*
415 area code numbers (North America only)	415*
Null telephone numbers	is null
415 area code or null (North America only)	415* or is null
(800) SKY-PAGE	800SKY*

When the user performs a query using a telephone number, the country code of the default country automatically prefixes the query (unless the default country is in North America, in which case no prefix is added). For example, if the default country is Germany, and the user types "0181" in the telephone field of a query, the German country code (+49) is added to the query (that is, +49*0181*).

To find a number for a country other than the default country, the user must specify the country code in the query. To avoid limiting the query to one country, the user must refine the query and remove the country code portion of the query specification.

To see a demonstration of this behavior, look at the Contacts screen. Every number for a country other than the default contains a "+n" at the beginning, while every number for the default country code appears as local (no +). Numbers that have the "+n" require explicit queries (country code plus number) while local numbers are returned normally.

Importing Information with EIM

Siebel Enterprise Integration Manager (EIM) manages the exchange of data between Siebel database tables and other corporate databases. When you use EIM to import information that includes international telephone numbers, the numbers are handled as described in the previous sections.

For more information about EIM, see *Siebel Enterprise Integration Manager Administration Guide*.

Setting Up Pager Companies

Pager companies can be set up so they are available from the File > Send > Page menu.

To set up a pager company

1. From the application-level menu, choose View > Site Map > Application Administration > Pager Companies.
2. In the Pager Companies list, add a new record and complete the necessary fields.

NOTE: The pager companies you use to send pages must support Telocator Alphanumeric Protocol (TAP), which is an industry standard for sending alphanumeric pages.

About Date Formats

For the Siebel Web Client the display format for date and time is determined by the locale settings of the application server. For more information, see "Setting Up Locales" on page 43.

For the Siebel Dedicated Web Client and the Siebel Mobile Web Client, the date format is determined by the specification in the client computer's operating system.

When a user creates a query using a date field, the user must use the appropriate date format.

Setting Up ZIP Codes

ZIP Codes are used to look up address attributes (City, State, and so on). They are also used to look up nine-digit postal codes based on the street address. Siebel eBusiness applications ship with a table of United States Postal Service ZIP Codes, and the table is available for customer use.

To add a ZIP Code

1. From the application-level menu, choose View > Site Map > Application Administration > ZIP Code Administration.
2. In the ZIP Geocodes list, add a new record.
3. Complete the necessary fields.

Administering Global Time Zone Support

The time zones records that are shipped with Siebel applications as seed data include the 74 world time zones. These are the same time zones used by Microsoft in its operating systems. Use the Time Zone administration view to:

- Edit the text descriptions of time zones and their abbreviations
- Manage the active status of time zones to control which time zones are available to end users for use in the applications
- Manage multilingual translations to control how time zone information is displayed to users in multiple languages

Tasks for administering time zones include:

- "Modifying Time Zones" on page 78
- "Maintaining Translations of Time Zones" on page 79

For more information on global time zone support, see *Global Deployment Guide*.

Modifying Time Zones

You will rarely need to modify a time zone's regional settings. However, you may want to modify other time zone settings such as the display name or daylight savings rules, as these occasionally change.

NOTE: You cannot add or delete time zones.

To modify time zone settings

1. From the application-level menu, choose View > Site Map > Application Administration > Time Zone Administration.
2. In the Time Zone list, select the time zone record you want to modify.

3 Modify the fields as necessary.

Some fields are described in the following table.

Field	Description
Name	Name of time zone.
Standard Abbreviation	The abbreviation for the time zone.
UTC Offset	Offset, in minutes, from Coordinated Universal Time (UTC) when daylight savings is not in effect.
DST Abbreviation	The abbreviations for daylight savings time (DST).
DST Bias	Incremental DST offset, in minutes, from UTC when DST is not in effect.
DST Start Ordinal	Part of the rule that determines when DST starts. For example, if the rule is *the first Sunday in April*, *First* is defined in this field.
DST Start Day	Part of the rule that determines when DST starts. For example, if the rule is *the first Sunday in April*, *Sunday* is defined in this field.
DST Start Month	Part of the rule that determines when DST starts. For example, if the rule is *the first Sunday in April*, *April* is defined in this field.
DST Start Time	Start time for DST.

Maintaining Translations of Time Zones

You maintain translations of the text-based fields for each time zone using the Time Zone Administration view.

To maintain translations of time zones

1 From the application-level menu, choose View > Site Map > Application Administration > Time Zone Administration.

2 In the Time Zone list, select the time zone you want to translate.

3 In the Time Zone Translation list, add a record and complete the necessary fields, including the translation of the Name field for the selected language.

4 Repeat Step 3 for each language required for translation.

Date and Time Stamps

The date and time used for time-stamping records are obtained by the Siebel Server. When a remote user runs the Siebel client in disconnected mode, the Siebel Server runs on the user's machine and takes the date and time from that machine.

If global time zone support is enabled, the server converts the date and time value to UTC.

Setting Up Email, Fax, and Mail Accounts (Contact Us)

Sales people use the Contact Us screen to answer questions and provide contact information to customers. If your organization uses Siebel eService, your customers can access this information directly from a Contact Us page on your Web site.

Creating a Contact Us Account

To help your sales people provide information on a chosen topic, you can create different accounts, such as Technical Support, Shipping, and Sales.

To add a Contact Us account

1. From the application-level menu, choose View > Site Map > Application Administration > Contact Us.
2. In the Email, Fax and Mail Accounts list, add a new record.
3. In the More Info form, complete the necessary fields.

   Some fields are described in the following table.

Field	Description
Account Type	Choose the Contact Us type.
Access List	Indicates which employees can view the Contact Us account.

Adding Email Addresses and Subjects

If your organization uses Siebel eService, any email addresses you include in Contact Us accounts appear on a Contact Us page on your Web site. You can create default email subjects that are added to the user’s Subject line when the user sends email through your Web site.

For more information, see *Siebel eService Administration Guide*.

Using Keyboard Accelerators

Keyboard enablement allows users to operate the Siebel employee applications using sequences of keystrokes as an alternative to the mouse for executing commands and navigating through the application. This is accomplished through the use of keyboard accelerators, specific sequences of keystrokes that are mapped to commands within the Siebel application environment. Typically, these key sequences are combinations of the Ctrl, Alt, and Shift keys, along with standard alphanumeric keys.

A full set of keyboard accelerators ship with the Siebel employee applications. Accelerators are defined in Siebel Tools and are fully configurable, although care should be taken when modifying accelerators.

Much of the default keyboard enablement provided natively by Web browsers is also available for use in the Siebel applications. For example, users can navigate sequentially through enterable fields within the application views with the Tab key.

For example, keyboard accelerators are provided for the following commands:

- Record manipulation: New Record, Delete Record, Copy Record, Edit Record, Save Record, Undo Record
- Query management: New Query, Execute Query, Refine Query, Save Query As
- Record navigation: Next Record, Previous Record, Next Page, Previous Page

Keyboard enablement is available in two modes: extended mode and basic mode. Extended mode keyboard enablement gives maximum flexibility in defining accelerators since any key sequence may be mapped to Siebel commands. However, extended mode keyboard accelerators may not be available to all users. Basic mode keyboard enablement is accessible to any user running the Siebel applications in High Interactivity mode. Each accelerator defined in the Siebel Repository can be specific to one keyboard enablement mode, or it can be common to both modes. For a list of basic and extended accelerators available, see *Fundamentals*.

NOTE: Both extended and basic mode keyboard enablement require that the Siebel applications are running in High Interactivity mode. It is possible that a few applets within the Siebel applications will not enable High Interactivity mode due to special applet functionality, even if High Interactivity mode is in effect for the applications in general. In these cases, keyboard enablement will not be active when the user is working within one of these specialized applets.

Extended Mode

Extended mode keyboard enablement is the default mode of operation for Siebel applications. Applications running extended mode keyboard enablement can map any key sequence to Siebel commands. This includes key sequences that have default interpretations native to the browser in use (for example, Ctrl + N opens a new browser window in late versions of Microsoft Internet Explorer). In cases where both the active Siebel application and the active browser have the identical key sequence mapped, the Siebel applications will *win* in extended mode. Extended mode keyboard enablement also allows accelerator key sequences to include special keys, such as function keys and the arrow keys.

To provide accelerator access to all available key sequences, extended mode keyboard enablement uses a lightweight ActiveX control to capture keystrokes in the browser. Presence of the control is detected automatically and the control is loaded only if necessary. Once loaded, the control is automatically maintained. It will not be loaded again unless an upgraded version becomes available on the application server.

In order for keyboard enablement to be active in extended mode, the following conditions must be met:

- The line “ExtendedKeyboard = TRUE” must appear in the [SWE] section of the configuration file for the active application
- The user's browser must be able to accept and correctly interpret the ActiveX control used to capture key sequences
- Each client browser must accept the lightweight ActiveX control used to capture key sequences. Acceptance of the control may be *silent*, or it may require the user to explicitly accept the control depending on browser security settings. If current browser security settings prohibit downloading of ActiveX controls, the browser security settings will need to be modified to allow ActiveX controls.

Basic Mode

Basic mode keyboard enablement is accessible to all browser clients running the Siebel applications in High Interactivity mode. No ActiveX control is required to support basic mode. The functional differences between basic mode and extended mode keyboard enablement are:

- Key sequences mapped natively by the current browser will take precedence over Siebel keyboard accelerators mapped to the same key sequences. For example, Ctrl + N in version 5.5 of Microsoft Internet Explorer will open a new browser window regardless of accelerator mappings for Ctrl + N in the Siebel applications.
- Basic mode keyboard accelerators cannot include special keys in their mapped key sequences. Special keys include, but are not limited to, function keys and arrow keys.

Keyboard enablement will be active in basic mode if either of the following is true:

- The line “ExtendedKeyboard = FALSE” appears in the [SWE] section of the configuration file for the active application.

- The current browser does not support extended mode keyboard enablement.

NOTE: Siebel applications use automatic browser detection to determine if a browser is capable of supporting extended mode keyboard enablement. If the current application is configured to run extended mode keyboard enablement but the browser on a particular client does not meet the minimum requirements, the application will be started with basic mode keyboard enablement in effect.

To configure new keyboard accelerators or modify existing ones, see *Siebel Tools Reference*.

Setting Up Industries

You can set up and maintain industry information used throughout the application. The information in the Industries view populates the Industries drop-down list, which is found in a variety of screens and views, such as in the Accounts and References screens. The Industry list can also be used by Siebel Assignment Manager to assign new leads or service requests to Siebel users. For example, a sales representative who covers the pharmaceutical industry can be assigned automatically to new accounts based on a *Pharmaceutical* Industry value.

To add an industry

1. From the application-level menu, choose View > Site Map > Application Administration > Industries.
2. In the Industries list, add a new record.
3. Fill in the Industry, SIC Code, and Type fields.

NOTE: The Industry and SIC Code values must be unique. If you add a value that already exists, you will receive an error message.

Setting Up Languages

You can set up and maintain language information used throughout the application. The information in the Languages view populates the Language drop-down list, which is found in a variety of screens and views, such as in the References and SmartScripts screens. The Language field can also be used by Siebel Assignment Manager to give assignments to call center agents who work for international companies and speak a variety of languages with customers.

For example, a sales representative for a German chemical manufacturing company could use a Danish SmartScript to make a sales call to a prospective customer in Copenhagen, and then make the same sales call using an Italian SmartScript when speaking to a prospective customer in Rome. In these cases, the Language field is used to identify the language into which each SmartScript has been translated.

To add a language

1. From the application-level menu, choose View > Site Map > Application Administration > Languages.
2. In the Languages list, add a new record.
3. Complete the Name and Code fields.

   NOTE: The Name and Code values must be unique. If you add a value that already exists, you will receive an error message.

NOTE: Languages cannot be deleted because deleting languages may cause problems with mobile Web client synchronization. While the delete language command can be restored using Siebel Tools, this is strongly discouraged. Additionally, ask for assistance from Siebel Technical Services before modifying any language code.

About Case Sensitivity

By default, Siebel applications are case sensitive. If you perform a query or search, there will be a match only if the search criteria you enter are capitalized in the same way the data is capitalized in the database.

For important information about how case sensitivity affects performance, see *Performance Tuning Guide*.

To force a case-sensitive search, use the operator = followed by the criterion in quotation marks. For example, if the user enters the criterion `='Computer'`, the query will return only records that have "Computer" spelled with a capital C in the field.

To force a case-insensitive search, use the operator ~LIKE. For example, if the user enters the criterion `~LIKE computer`, the query will return all records that have "computer" in the field, regardless of capitalization.

The user must also use ~LIKE to force case insensitivity in searches with complex criteria, regardless of the setting for case sensitivity.

NOTE: You should determine your requirements for case-insensitive searching and set the appropriate parameters for the application or individual field before users enter any data.

Enabling Application-Wide Case Insensitivity

Application-wide case sensitivity is controlled through the CaseInsensitive parameter of the named subsystem representing the datasource definition.

By default, each of these data source definitions has the following parameter setting:

```
CaseInsensitive = FALSE
```

To enable application-wide case insensitivity, you change this setting to TRUE.

NOTE: There may be a performance degradation when the CaseInsensitive parameter is set to TRUE. You may want to also change the InsensitivityFactor Parameter to minimize performance degradation. For more information, see "Modifying the InsensitivityFactor Parameter" on page 91.

The CaseInsensitive parameter only affects which data is retrieved by queries. It does not affect the order in which data appears on the screen. The sort sequence is database-dependent, and independent of the CaseInsensitive parameter.

In addition, the content of SRF files is case-sensitive in most cases and is not affected by how this parameter is set in the application configuration file.

You change the CaseInsensitive parameter in different ways, depending on whether you are working with Siebel Web Client or Siebel Dedicated Web Client.

Enabling Application-Wide Case Insensitivity for Siebel Web Client

For Siebel Web Client, you make changes to the CaseInsensitive parameter in the Server Administration screen.

To enable application-wide case insensitivity for Siebel Web Client

1. From the application - level menu, choose View > Site Map > Server Administration > Enterprise Configuration.
2. Click the Enterprise Profile Configuration view tab.

3. In the Component Profiles list, select the Named Subsystem Alias for the data source.

4. In the Enterprise Profile Configuration list, change the value of the DSCaseInsensitiveFlg to True.

5. Optionally, change the InsensitivityFactor Parameter as well, to control performance degradation.

6. Stop and restart the Siebel Server.

   For more information, see "Modifying the InsensitivityFactor Parameter" on page 91.

Enabling Application-Wide Case Insensitivity for Siebel Dedicated Web Client

For Siebel Dedicated Web Client, application-wide case sensitivity is controlled through the CaseInsensitive parameter in the configuration file for your application.

The configuration file for each Siebel application has a section for each one of the potential data sources for the application. By default, each of these data source sections has the following line:

```
CaseInsensitive = FALSE
```

To enable application-wide case insensitivity for Siebel Dedicated Web Client

1. Use any text editor to open your application configuration (.cfg) file.

2. Change the CaseInsensitive parameter to

   ```
   CaseInsensitive = TRUE
   ```

3. Optionally, change the InsensitivityFactor parameter to control performance degradation.

   The InsensitivityFactor parameter follows the CaseInsensitive parameter in each application configuration file. For more information, see "Modifying the InsensitivityFactor Parameter" on page 91.

Modifying the InsensitivityFactor Parameter

When you change the CaseInsensitive parameter, you may also want to change the InsensitivityFactor parameter to minimize performance degradation.

The default setting for the InsensitivityFactor parameter is 2.

NOTE: Do not change the default value of InsensitivityFactor for Gateway Datasource (GatewayDataSrc). Gateway Datasource does not go against a database. Changing the value may cause problems.

You may want to test a number of values for this parameter with your database, spool the SQL to see the effect of different settings on response time, and then choose a value that meets your needs.

Enabling Field-Specific Case Insensitivity

You can also make individual fields case-insensitive. If you are concerned about performance, it is better to make a few fields case-insensitive than to enable application-wide case insensitivity.

You control field-specific case insensitivity with the Use Default Sensitivity property. This property determines whether the field uses the default property specified by CaseInsensitive parameter in the .cfg file, described previously. Table 10 illustrates the relationship between the application-wide CaseInsenstive parameter and the field-specific Use Default Sensitivity property.

Table 10. Case Sensitivity Behavior

Use Default Sensitivity =	CaseInsensitive = TRUE	CaseInsensitive = FALSE
TRUE	Field is case insensitive	Field is case sensitive
FALSE	Field is case sensitive	Field is case insensitive

To enable case insensitivity for individual fields

1. Leave the CaseInsensitive parameter set to FALSE in the application configuration file.
2. In Siebel Tools, navigate to the Business Component/Field screen.
3. For each field you want to be case-insensitive, set the Use Default Sensitivity property in the field object to FALSE for the Field level Object Type.

   You can also force the case of data in a field to be UPPER (all uppercase), LOWER (all lowercase), FIRSTUPPER (first letter of each word is uppercase, or NONE (unchanged).
4. After doing this for all of the fields you want to control, recompile your .srf file.
5. Replace the .srf file in your Siebel Server installation.

Adding Web Browser Capabilities

Siebel applications come with a number of browsers configured for use. Generally, you will not need to make changes to the Web browser settings. However, if you need to add a capability to a browser, you can do so through the Web Browser Administration screen.

Web browser capabilities identify what an end user's browser can and cannot do. They support the Siebel Web Engine's ability to provide different HTML tags and other markup tags to different browsers, based on what each particular browser is capable of rendering. This can also allow an administrator or developer to specify what looks best in a particular browser.

When a user logs into a Siebel Web application, the Siebel Web Engine reads information encapsulated in the requests coming from the user's browser to determine the browser’s version and make. It then correlates that information with the data contained in the Web Browser Administration views to determine the browser’s capabilities.

One of the primary ways this information is applied is through conditional tags in Web templates. For example, if some of your users use an older browser that does not support frames, your template might include a conditional tag that prevents these users from receiving pages with frames. Conditional Web engine tags that evaluate browser capabilities can be used in all Siebel Web templates and Web applications, but are used most prominently in those that support wireless devices. Conditional Web engine tags that evaluate browser capabilities can be used in all Siebel Web templates and Web applications, but are used most prominently in those that support wireless devices. For example, the SWLSDetailApplet.swt template includes the following conditional tag:

```
<swe:switch>

<swe:case condition="Web Engine User Agent, TestCapability,
DefaultMarkup:XML'">

<swe:xsl-stylesheet name="SWLSDetailApplet.xsl" mode="process"/>

</swe:case>
```

By the time that the Web Engine interprets the swe:case tag, it has already determined what type of browser the user has. The usage of the tag causes the Web Engine to call the “TestCapability” method on the “Web Engine User Agent” business service. The “TestCapability” method will return TRUE if the user’s browser has a Capability called “DefaultMarkup” with a value of “XML.” When the condition is met (that is, the method returns TRUE) the tags between <swe:case> and </swe:case> are processed. In this example the Web engine is instructed to use a particular XSL style sheet. For more information about the syntax of conditional tags, see *Siebel Tools Reference*.

Adding JumpTab Capability for Internet Explorer 5.0

If you are running your Siebel application on Internet Explorer 5.0, you need to set the JumpTab capability to True.

(If the JumpTab capability is not set, users need to click the back button twice to return to the previous page.)

To add the JumpTab capability

1. From the application-level menu, choose View > Site Map > Web Browser Administration > Capabilities.
2. In the Capabilities list, select the JumpTab capability record.
3. In the More Info form, in the Capability Value field, enter TRUE.

Adding Additional Capabilities

Siebel applications come with a number of predefined capabilities. These capabilities can be added to any browser. Some examples include:

- **FrameSupport.** Indicates whether the browser can render frame tags (for example, <swe:frameset>).
- **CookiesAllowed.** Indicates whether the browser supports cookies.
- **HighInteract.** Indicates whether the browser is among those supported for Siebel's High Interactivity Web applications (such as Internet Explorer 5.5).
- **ActiveX.** Indicates whether the browser can support ActiveX controls.

You can also add other capabilities that are not included in the standard Siebel application. For example, you could add a capability named *SupportsWingDingFont*. New capabilities then become available for use in any browser definition.

To add a capability

1. From the application-level menu, choose View > Site Map > Web Browser Administration > Capabilities.
2. In the Capabilities list, add a new record.
3. Complete a name and description for the new capability.

Adding Additional Web Browsers

If you need to add a Web browser definition that is not included in the standard Siebel application, you can choose between the following two methods.

- Add a parent browser definition. This definition includes all of the browser capabilities. Use this method if you need to add a completely new browser (such as Opera), or a major upgrade release of an existing browser (such as future releases of Microsoft Internet Explorer or Netscape). For information about this procedure, see "To add a parent Web browser" on page 97.

- Add a child browser definition. Child browser definitions inherit the capabilities of the parent browser, and add additional capabilities as necessary. Use this method for adding interim releases based on a browser that is already defined. For example, a "dot" release, such as 5.7 or 5.8. For information about this procedure, see "To add a child Web browser" on page 98.

Required Browser Capabilities

For a browser to work correctly, it must include two capabilities that allow the browser to be identified at runtime. The required capabilities are:

- **User-Agent.** This capability names the browser.

- **Accept.** This capability indicates what types of documents the browser can open.

These capabilities are part of HTTP standard information and appear in HTTP request headers sent from a browser. For example, a request from a Microsoft Internet Explorer 5.5 browser sent to a Web application might include the following lines:

```
Accept: image/gif, image/x-xbitmap, image/jpeg, image/pjpeg,
application/vnd.ms-powerpoint, application/vnd.ms-excel,
application/msword, */*

User-Agent: Mozilla/4.0 (compatible; MSIE 5.5; Windows NT 4.0)
```

In this example, the value for the User-Agent capability would be Mozilla/4.0 (compatible; MSIE 5.5; Windows NT 4.0).

Both the User-Agent and Accept capabilities must be included. This is because at runtime, the User-Agent is checked to identify the browser. If the User-Agent is not recognized, the values for the Accept parameter in the header will be compared to the Accept parameters of the browsers listed in the Web Browser Administration screen, to find the browser with the most closely matching Accept parameters.

In addition to the User-Agent and Accept capabilities, if a browser is based on an existing parent browser, it must include the Parent capability.

NOTE: Parent browsers frequently do not have the User-Agent and Accept capabilities. This is because parent browsers are intended to serve as containers of other capabilities that can be inherited. If a browser does not have its own User Agent and Accept capabilities, then it is acting as a parent of another browser that has these capabilities.

Adding a Web Browser

Whether you are adding a parent browser or a child browser, the process is similar. However, in the case of a parent browser, you add all detailed components, and in the case of a child browser, you base the browser on an existing browser.

NOTE: Although a parent browser may contain the User-Agent and Accept capabilities, it does not have to. If you use parent browsers as templates for child browsers, do not include these two capabilities in the parent browser template.

To add a parent Web browser

1. From the application-level menu, choose View > Site Map > Web Browser Administration > Browsers.
2. In the Browser list, add a new record.
3. Complete a name and description for the new browser.
4. Click the Capabilities view tab.

5 In the Capabilities list, add records for each of the capabilities for this browser.

NOTE: If there is an existing browser that contains most of the appropriate capabilities, you can copy it and then make changes. To do so, in Step 2, click the menu button and choose Copy Record instead of New Record.

To add a child Web browser

1 From the application-level menu, choose View > Site Map > Web Browser Administration > Browsers.

2 Scroll through the list of browsers and identify the parent browser (that is, the one on which you will base the new browser).

3 Add a new record.

4 Complete a name and description for the new browser.

5 Click the Capabilities view tab.

6 In the Capabilities list, add these three records:

- **Parent.** Set the capability value to the parent browser you identified in Step 2.
- **User-Agent.** Enter the appropriate User-Agent.
- **Accept.** Enter the types of documents that can be opened by the browser.

7 Add any additional capabilities that are not included in the parent browser or that differ from those inherited from parent browser.

Working with Lists of Values 4

This chapter provides guidelines to administrators for working with lists of values within Siebel applications.

A list of values (LOV) is a set of values that populates a *static pick list*, which is accessed when a user clicks a drop-down list in the user interface.

Drop-down lists can be based on two types of pick lists: static pick lists and dynamic pick lists.

- A static pick list has a selection list that is a static list of values. An example of a static pick list is a drop-down list containing postal abbreviations for states and countries.
- A dynamic pick list has a selection list that usually contains transactional data. An example of a dynamic pick list is a drop-down list containing account names.

  As a rule of thumb, dynamic pick lists include all pick lists that do not retrieve values stored in the S_LST_OF_VAL table. Dynamic pick lists are typically rendered through a pick applet, such as the pick list used to choose an account for a contact. However, they can be configured to appear as a drop-down list.

The remainder of this section focuses on static pick lists, whose contents can be administered from the List of Values views. For information on how to set up a new list of values and configure both static and dynamic pick lists, see *Siebel Tools Reference*.

This section describes how to work with the values that populate static pick lists, including how to add or modify values in an existing list of values, and inactivate values when you do not want them to display. In addition, it describes how lists of values can be constrained by selections in other lists.

NOTE: If you will be creating multilingual lists of values (MLOV), you should also review *Siebel Tools Reference*.

There are two screens in which you can view list-of-values data:

- In a list view in the Application Administration screen, List of Values view
- In an explorer view in the Application Administration screen, List of Values Explorer view

The values in these two views are the same. Only the format in which the information is presented is different. The procedures in this section give instructions that specify using the list view. If you prefer to use the explorer view, you may do so.

Your Siebel applications come with numerous lists of values that support the static pick lists used throughout Siebel screens. You can use these as they are, or you can modify them through the List of Values screen to support your organization's requirements.

Adding a New Value to an Existing List of Values

In order to add an item to an existing list of values so that it shows up in a drop-down list, you must know its type. You can find out the type by querying the List of Values list to determine the type associated with a specific display value. Then you can add a new record with that type. For instance, in the Accounts list you can see the Status drop-down list. Imagine that you use this field to indicate ratings for your accounts' reliability. Initial settings are Gold and Silver. You might want to add another status of Bronze to this list, to give to customers that have a reliable account rating. The procedure below uses this example.

To identify the list-of-values type for a display value

1. Navigate to the screen displaying the drop-down list to which you want to add a value (for example, the Accounts screen).
2. Select the drop-down list and make note of one of the choices.

   For example, in the Accounts screen, select the Status drop-down list and make note of the value *Gold*.

   TIP: Be sure to note the capitalization and spacing of the choice.

   ---
3. From the application-level menu, choose View > Site Map > Application Administration > List of Values.
4. In the List of Values list, perform a query in the Display Value field, using the value you noted in Step 2.
5. In the list of records that is returned, identify the appropriate record by reviewing the entries in the Type field.

   List-of-values types usually have names that relate to the field labels in the screens where they are used. In this example, you would look for a type labeled something like ACCOUNT_STATUS.

   When you create a new value for this list, you will use this type.

To add a new value to an existing list of values

1. From the application-level menu, choose View > Site Map > Application Administration > List of Values.
2. Click New to create a new record, and then enter the list-of-values type in the Type field.
3. Enter a new value in the Display Value field.

   For example, if Bronze is the status that your organization gives customers that have a reliable account rating, and you want to make Bronze available as in the Account Status drop-down, you would add a new record with ACCOUNT_STATUS as the type and Bronze as the display value.

   Make sure that the length of the Display Value you enter does not exceed the allowed length of the destination column.
4. Enter a value in the Language Independent Code field. This value is usually the same as the Display Value.

   Make sure that the length of the Language Independent Code you enter does not exceed the allowed length of the destination column.

   NOTE: The Display Name and Language Independent Code must both be unique within a list-of-values type, except when configuring a multilingual list of values. If you add a value that already exists, you will get an error message. For example, there cannot be two ACCOUNT_STATUS records that have a display value of Bronze. For information about how this differs for multilingual lists of values, see the definition of the Language Independent Code field in Table 11 on page 105.

   ---
5. If applicable, in the Order field, you can enter a number to indicate the numerical order in which the value appears in a drop-down list.

   For example, if the order numbers for Gold and Silver are 1 and 2, respectively, the order number for Bronze would be 3.
6. If appropriate, fill in the remaining fields in the record.

   For a description of these fields, see “List of Values Fields” on page 105.

7 Clear the LOV cache by clicking the menu button and then choosing Clear LOV Cache.

After you have cleared the cache, you can navigate to a screen and select the new value in the related drop-down list. For example, you can navigate to the Accounts screen, select a record from the Accounts list, and then choose Bronze in the record's Account Status drop-down list.

Clearing the Cache

A particular list of values is cached the first time a user opens a drop-down list that uses the list of values. This improves performance by avoiding the need to retrieve the list from the database upon subsequent usage of the drop-down list. However, this also means that updates to a list of values will not show up in a drop-down list until you clear the cache. Clearing the cache instructs the Siebel application to read the updated values out of the database and display them.

Users who log in after you add or change a list of values can see the addition or change that you made. However, in order for you to see the changes that you made in real time, you must do one of the following:

- For the Dedicated Web Client, log out of the application and log back in.
- For either the Web Client or the Dedicated Web Client, clear the cache.

To clear the cache (using the Clear Cache button)

1. From the application-level menu, choose View > Site Map > Application Administration > List of Values.
2. In the List of Values list, click Clear Cache.

To clear the cache (from thesrvrmgr command-line interface)

1. Determine the current value of the parameter Object Manager Data Cache Version (alias OMDataCacheVersion) for the named subsystem Object Manager Cache (alias objmgrcache).
2. Increment the value by 1.
3. For information on listing and modifying named subsystem parameters using srvrmgr, see *Siebel Server Administration Guide*.

List of Values Fields

List-of-values records have the fields shown in Table 11. Not all fields for list-of-values records are displayed in the standard user interface. You can use the Columns Displayed menu option to see a field that is not displayed.

Some list-of-values fields, such as High, Low, and Weighting Factor, are for use by specialized Siebel C++ code to store additional information about the selected list of values record. In addition, pick maps can use list-of-value fields such as High, Low, and Weighting Factor. Pick maps normally use the Display Value field, which causes the list item selected by the user to be stored in the database exactly as it appears in the list. These fields can be used to populate other fields of the business component in which the pick map is defined.

If you need to use the High or Low fields, or other extra fields, use Siebel Tools to extend the PickList Generic BusComp by adding fields mapped to the corresponding columns on the S_LST_OF_VAL table. For example, you could use the High and Low fields to automatically fill in the high and low temperatures when a user picks a Month value in a Date drop-down list. To do so, you would add two pick maps to the Month field by adding the High and Low list of value fields to the Pick List field of Pick Map. For more information about the PickList Generic BusComp, and about configuring static pick lists and pick maps, see *Siebel Tools Reference*.

NOTE: The Target High and Target Low fields are used exclusively with Smart Reports. For more information, see *Siebel Reports Administration Guide*.

Table 11. List of Values Fields

Field	Description
Type	The type of list of values (the field name).
Display Value	Value as displayed in the drop-down list.
Translate	When checked, indicates that internationalization is needed. (There is no client or server functionality associated with this field; for more information, see *Siebel Tools Reference*.)

Table 11. List of Values Fields

Field	Description
Multilingual	When checked, indicates that the list of values is part of a multilingual list of values (MLOV). (There is no client or server functionality associated with this field; for more information, see *Siebel Tools Reference*.)
Language Independent Code (LIC)	Along with the Display Value, the Language Independent Code uniquely identifies a value for a particular LOV type. In most cases the Language Independent Code is the same as the Display Value. However, the Language Independent Code and Display Value are different for multilingual lists of values (MLOVs). MLOVs allow a single logical list item to support multiple display values for users who are accessing the Siebel application in different languages. For example if the MR_MS (Personal Title) list of values were multilingual, there might be three list of values items with a Language Independent Code of Mr. These might have a display value and language of Mr. (English-American), Senor (Spanish - Modern), and Herr (German), respectively. German users would see Herr in the Personal Title drop-down list, Spanish users would see Senor and English users would see Mr. Although the display values vary across language instances, the value stored in the database when a user selects any one of these will always be Mr. since that is the Language Independent Code associated with Herr, Senor, and Mr. For more information on configuring multilingual lists of values, see *Siebel Tools Reference*. Values entered in the Language Independent Code field are sometimes referred to as LIVs (language independent values).
Parent LIC (Language Independent Code)	The Language Independent Code of a parent list of values. Used in hierarchical lists of values, where the values that will display in a drop-down list are constrained by the value selected in the parent drop-down list of values. For more information, see "Constrained Lists of Values" on page 111. There are only parents and children in this hierarchy. Grandchildren are not allowed. This is enforced by limiting the values in the Pick Parent dialog box to those values which do not themselves have parent display values.
Replication Level	Specifies whether the translation is intended for use at all levels in the translation hierarchy or only at the regional level.

Table 11. List of Values Fields

Field	Description
High	Extra field available for use by pick maps or for customization.
Low	Extra field available for use by pick maps or for customization.
Order	The numerical order in which a value is displayed within a drop-down list.
Active	When checked, indicates that the value is displayed to the end user. When unchecked, indicates that the value is not displayed to the end user.
Language Name	Language used for the list of values Display Value field.
Target Low	Extra field used in Smart Reports. For more information, see *Siebel Reports Administration Guide*.
Target High	Extra field used in Smart Reports. For more information, see *Siebel Reports Administration Guide.*
Weighting Factor	Extra field available for use by pick maps or for customization.
Bitmap	Bitmap file that is displayed.
Description	Description of a specific value.

Modifying a List of Values

CAUTION: Use caution when modifying lists of values that are part of the seed data. Modifying some list of values fields that are used programmatically by the Siebel application can adversely impact standard Siebel functionality. However, you can modify the Display Value field without affecting standard Siebel functionality both when the list is a multilingual list of values (MLOV) and when it is a standard list of values.

Modifying some lists of values can adversely impact standard Siebel functionality:

- Do not change the Language Independent Code values for lists of values because the internal Siebel application uses the Language Independent Code field.
- Some lists of values are for use only by the internal Siebel application and should not be modified. For example, the List of Values SOURCE_TYPE (Internal) and list-of-values types that include REPOSITORY in the Type field name are for internal use only.
- Some list of values modifications can have undesired results. For example, changing all lists of values in the application to uppercase or changing the Language Independent Code from the Siebel standard can result in values not being displayed or being displayed improperly.

NOTE: Modifying a Display Value field does not automatically update records that have been populated with the old value. For example, if you change *Ms.* to *Miz* in the Display Value field, *Miz* will show up in the drop-down list, but all contact records that were previously entered with *Ms.* in the Personal Title field will still have *Ms.* in the Personal Title field.

For more information about multilingual lists of values (MLOVs), see *Siebel Tools Reference*.

In order to modify a value in a drop-down list, you must know its display value and type. You can find out the type by querying the List of Values list for a specific display value. For example, if you needed to make a change to the value *1-ASAP* in the Priority drop-down list in the Activities screen, you could do so using the following steps.

To modify an item in a list of values

1. From the application-level menu, choose View > Site Map > Application Administration > List of Values.
2. Click the menu button, and then choose New Query.
3. Enter the Display Value for the record you want to change in the Display Value field.

   For example, you might enter the value *1-ASAP*.
4. Click the menu button, and then choose Run Query.

   A list of records appears that includes the display value that you entered. More than one record may appear, and the records may have different types.
5. In the list of records, select the record that you want to modify, and make the desired change.
6. To see the list of values modification in the application, clear the cache. For instructions about how to clear the cache, see "To clear the cache (using the Clear Cache button)" on page 104.

Inactivating a Value in a List of Values

You can inactivate individual values in a list, but you cannot delete values. Inactive values are values that the application does not display to end users in a drop-down list, whereas active values are displayed to end users.

CAUTION: Inactivating some lists of values can adversely impact standard Siebel functionality.

Do not inactivate list-of-values types or values used internally by the Siebel application. For example, do not inactivate list-of-values types that include “Repository” in the Type field name.

Be careful when inactivating a list of values, because the application may depend on the list of values being present.

Be careful when inactivating individual values as well. For example, if you inactivate the value Commercial in the Account_Type list of values, but you have existing or old account data that stored Account Type = Commercial, you may introduce inconsistencies in your data. If you want to inactivate a display value, you need to clean up the account records in the database first.

To inactivate a value in a list of values

1. From the application-level menu, choose View > Site Map > Application Administration > List of Values.
2. If necessary, perform a query to locate the record you want to make inactive.
3. Select the list of values record you want to make inactive.
4. In the Active field, click the check mark. When a square containing an x appears, click the x.

   The x disappears and the Active field no longer contains a check mark.
5. To see that the value has been inactivated, click the menu button and then click Clear LOV Cache.

Constrained Lists of Values

Some drop-down lists are set up to display a subset of values based on a value set in another drop-down list. For example, if you have two fields for Service Request, *Area* and *Subarea*, the values shown in the Area drop-down list might include *Network* and *Upgrade*. If the user chooses *Network*, that user might see a drop-down list for Subarea that includes *Ethernet Card* and *3rd Party Software*. If on the other hand the user chooses *Upgrade* for the Area, that user might see *CD-ROM*, *Disk Drive*, *Memory,* and *Operating System* in the Subarea. Setting up this type of filtering is referred to as setting up a *constrained pick list*. In such a case, the lists of values have been configured to be dependent on one another. In this example, the Area drop-down list is considered to be the parent and the Subarea drop-down list is the child.

Figure 1 shows the values available in the Area drop-down list, and the values available in the Subarea list when Network and Upgrade have been selected, respectively.

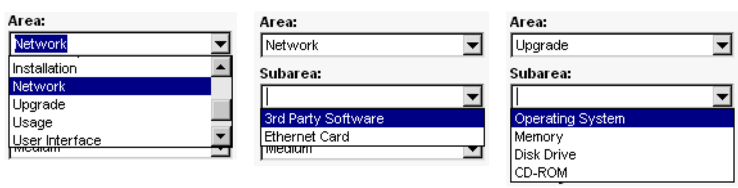
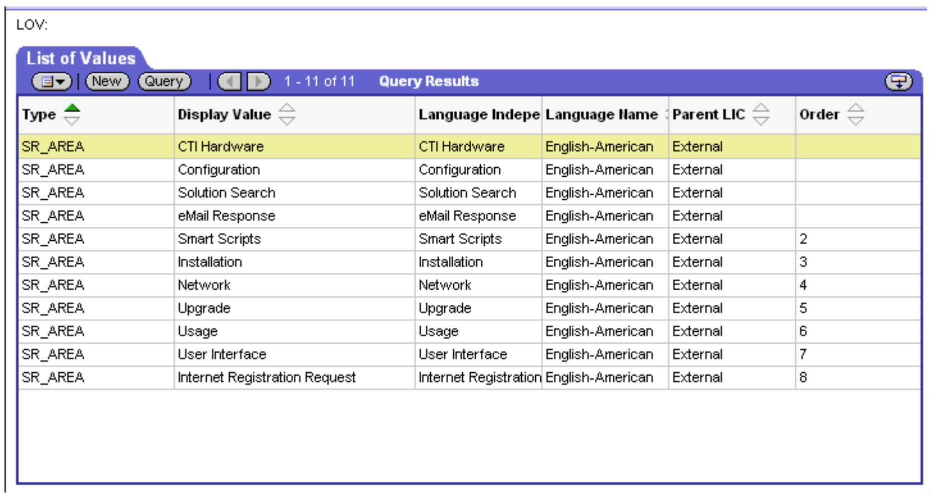


Figure 1. Contents of Drop-Down List Constrained by Parent Drop-Down List

Constrained pick lists (or lists of values) must first be set up through Siebel Tools. After they are configured through Siebel Tools, specific values in lists can be made hierarchically dependent through the List of Values screen. This is accomplished by using the Parent LIC attribute in the list of values record to specify which values will show up when a value is selected in the parent drop-down list.

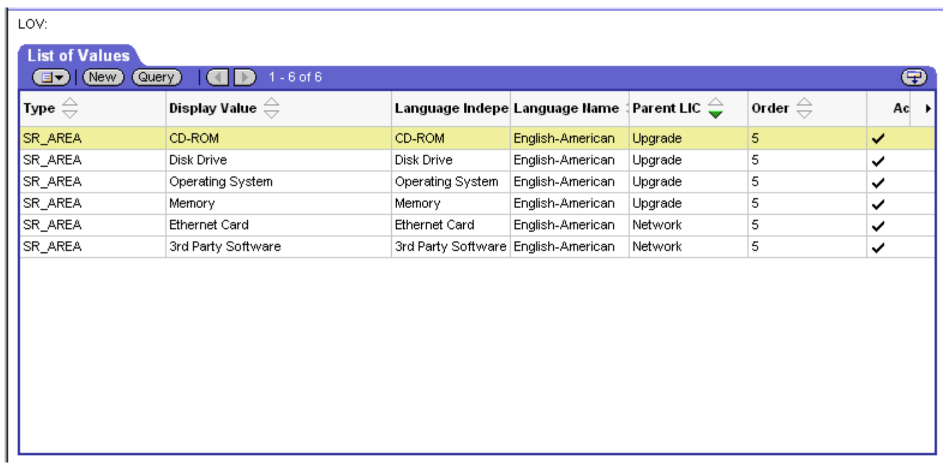
For example, the LOV Type SR_AREA is used by both the Area and Subarea drop-down lists in a Service Request. The values that show up in the Area drop-down list are constrained to those that have a Parent LIC value of External. Figure 2 shows how the records for these values appear in the List of Values list, including the Parent LIC value of External.



Type	Display Value	Language Indepe	Language Name	Parent LIC	Order
SR_AREA	CTI Hardware	CTI Hardware	English-American	External	
SR_AREA	Configuration	Configuration	English-American	External	
SR_AREA	Solution Search	Solution Search	English-American	External	
SR_AREA	eMail Response	eMail Response	English-American	External	
SR_AREA	Smart Scripts	Smart Scripts	English-American	External	2
SR_AREA	Installation	Installation	English-American	External	3
SR_AREA	Network	Network	English-American	External	4
SR_AREA	Upgrade	Upgrade	English-American	External	5
SR_AREA	Usage	Usage	English-American	External	6
SR_AREA	User Interface	User Interface	English-American	External	7
SR_AREA	Internet Registration Request	Internet Registration	English-American	External	8

Figure 2. LOV Records with the Same Parent LIC

The values that show up in the Subarea drop-down list are constrained to those that have a Parent LIC value that matches the user's selection for the Area. For example, if the user selects *Network* in the Area drop-down, only those values that have the Parent LIC set to *Network* show up in the Subarea drop-down list, while if the user selects *Upgrade* in the Area drop-down, only those values that have the Parent LIC set to *Upgrade* will show in the Subarea drop-down list. Figure 3 shows the records for the values that are available for both the Network and Upgrade parent values.



Type	Display Value	Language Indepe	Language Name	Parent LIC	Order	Ac
SR_AREA	CD-ROM	CD-ROM	English-American	Upgrade	5	✓
SR_AREA	Disk Drive	Disk Drive	English-American	Upgrade	5	✓
SR_AREA	Operating System	Operating System	English-American	Upgrade	5	✓
SR_AREA	Memory	Memory	English-American	Upgrade	5	✓
SR_AREA	Ethernet Card	Ethernet Card	English-American	Network	5	✓
SR_AREA	3rd Party Software	3rd Party Software	English-American	Network	5	✓

Figure 3. LOV Records Constrained by the Values Upgrade and Network

If you needed to change the parent Area to which a Subarea list item belongs, you would modify the Parent LIC code of the Subarea list item. Similarly, to add a new Subarea list item, you would add a new record, setting the list-of-values type to SR_AREA and the Display Value, Language Independent Code, and Language as described in "Adding a New Value to an Existing List of Values" on page 101. Then you would set the Parent LIC code to the appropriate parent area. By contrast, to add a new item to the Area drop-down list, you would follow the same steps, but specify that the Parent LIC code have the value *External*.

NOTE: The usage of the value *External* to identify items in the parent drop-down list is specific to this example. To determine what this value would be for any given pair of constrained pick lists, reference the underlying configuration in the Tools Repository.

For information about constraining both static pick lists (maintained through lists of values) and dynamic pick lists, see *Siebel Tools Reference*.

NOTE: In the example above using the Area and Subarea drop-down lists, both parent and child lists of values have the same list-of-values type. While this is not required, it has the advantage of avoiding EIM unique key violation errors. These errors can occur when constraining pick lists using Siebel Tools, when the parent and child lists of values contain different list-of-values types. If you plan to use Siebel EIM to exchange list of values data, you should consider constraining pick lists by configuring them so that the parent and child lists of values have the same list-of-values type.

Audit Trail 5

Audit Trail creates a history of the changes that have been made to data in Siebel applications. An audit trail is a record showing who has accessed an item, which operation was performed, when it was performed, and how the value was changed. Therefore, it is useful for maintaining security, examining the history of a particular record, and documenting modifications for future analysis and record keeping. Audit Trail logs information without requiring any interaction with, or input from, your users.

Audit Trail can be used for a variety of purposes. In a simple example, a call center uses an audit trail to track the status change of a service request, who changed it and when. Audit trail capabilities can also be used to track the time needed to change the state of an item, such as a service request from open to closed. A calculation of the time difference can help the call center manager measure and improve service quality. Audit trail can also be used to reproduce a record at a given point in time to maintain regulatory compliance by looking at the audit trail records of changes and the current state of the record.

For any audit trail deployment, the combination of the number of fields audited and the number of audit records created by a given business process has performance implications. Auditing a large number of fields on a business component or auditing fields in a large number of business components may produce unacceptable performance that is counter to the overall business requirement.

Audit trail works for replication and synchronization. For Siebel Remote and Siebel Replication users making changes to records, Audit Trail records successfully committed transactions and also transactions that did not get synchronized to the server because of conflicts.

The Siebel Web Client supports the following choice of audit trail modes:

- **File auditing.** An audit trail can be written to files and later imported into the database, providing better performance.

- **Database auditing.** An audit trail can be written directly into the database, supporting both remote users and replicated databases. Changes to an audit trail field are cached in the application. Exiting from the Siebel application and restarting it writes all cached changes to the database. Alternatively, when the cache size is reached, all cached entries are automatically written to the database even without exiting from the application.

Audit Trail Features

You can configure and activate Audit Trail from an administration screen.

Audit Scope

System administrators can specify the audit scope by the following means:

- Operations (such as update, new, delete, and copy) performed on business components
- Operations performed in a specific time period
- Only those operations performed by certain responsibilities, positions, or employees

Audit Trail Content

Audit Trail records the following information in selected business components:

- Field
- Row ID of the record being changed
- Operation being performed (Update/New/Delete/Copy)
- Original value
- Changed value
- User ID performing the operation
- Date and time the operation was performed

Audit Trail Constraints

The following cannot be audited:

- The underlying business component not derived from CSSBCBase. This is because Audit Trail's functionality resides only in business components of class CSSBCBase. The procedure "To determine if a business component can be audited" tells you how to determine whether or not a business component can be used in Audit Trail.

- Business components based on intersection tables.
- Virtual business components, because they are not derived from business components of class CSSBCBase.
- The merge action.
- Multivalue fields.
- Calculated fields. Typically, the value for a calculated field is derived from a table-based field. To audit a calculated field, you can audit the table-based field that was used to derive the calculated field.
- Record inserts, updates, and deletes performed through Enterprise Integration Manager (EIM), Assignment Manager or workflow policy actions (because these do not go through the Siebel Object Managers).

To determine if a business component can be audited

1. Launch Siebel Tools.
2. In the Object Explorer, navigate to the Business Component object type.
3. In the Object List Editor, select the business component.
4. In the Class field, look for CSSBCBase. If the class is CSSBCBase, the business component can be used for Audit Trail.

   CSSBCBase and CSSBusComp are the most basic class types. If there is a value in the Class field that is not CSSBCBase or CSSBusComp, then there is specialized functionality that has been written in C++ related to this class.
5. To see if this specialized class is related to CSSBCBase, drill down on the Class hyperlink.

6 In the Super Class field, look for CSSBCBase. If the class is not CSSBCBase, drill down on the Super Class hyperlink.

If the Super Class is...	Then the business component...
CSSBCBase	can be audited.
CSSBusComp	cannot be audited.
(blank)	cannot be audited.

NOTE: Repeat Step 6 until the Super Class field is either CSSBCBase, CSSBusComp, or blank.

Audit Trail for Siebel Remote and Siebel Replication Users

The following information applies to remote and replication users:

- Disconnected users can use Audit Trail as well as connected users. Audit Trail will stamp transactions with local machine time.
- Remote and replication users should not use file auditing mode, only database auditing mode.
- Audit trails are synchronized or replicated along with other data.
- If the transaction is rejected during the conflict resolution, the corresponding audit trail record is not discarded.

File Auditing and Database Auditing Modes

The following information applies to file auditing and database auditing modes:

- Database auditing writes transaction records directly to the database, while file auditing writes to the Siebel file system. You can later import these files into the database. (See "To import audit trail items from a file into the Siebel database" on page 134.) You can schedule import batch processes for these files using workflow processes. (See the ImportAll method in Table 12 on page 121.)

- If you use file auditing mode, you have to import files into the database to have a comprehensive view and to be able to query for the information you need. Otherwise, you can view records only on a file-by-file basis.
- For systems in which every user is a connected user, file auditing mode yields better performance. Systems using Siebel Remote should use database auditing.
- Purging and archiving can be done at the database level.

Audit Trail Recovery in File Auditing Mode

When running in file auditing mode, instead of writing to the Siebel file system every time a new Audit Trail file is created, your Siebel application saves Audit Trail files to a file directory on the Object Manager to improve performance. When the Object Manager closes normally, these files are uploaded to the Siebel file system simultaneously.

If the Object Manager exits abnormally, Audit Trail keeps track of which files have been uploaded to the Siebel file system and which ones have not. The next time Audit Trail starts, any files that have not been uploaded are uploaded automatically.

Audit Trail Engine Business Service

The Audit Trail Engine business service is located in the Object Manager and stays active as long as the Object Manager is active. The purpose of the Audit Trail Engine business service is to capture changes (updates and deletes) to records and to store them in the designated format (database or Siebel file system, according to the audit trail mode selected). For the various data operations, if the auditing condition is met, the business component being audited triggers the Audit Trail Engine business service.

The methods listed in Table 12 are associated with the Audit Trail Engine business service. The Start, Stop, and ImportAll methods are accessible to an administrator and allow the performance of certain tasks.

Table 12. Exposed Methods in the Audit Trail Engine Business Service

Method	Mode	Internal Use Only	Description
Start	Both		Starts the Audit Trail Engine.
Stop	Both		Stops the Audit Trail Engine.
ImportAll	File only		Imports all the associated Audit Trail Item business component records.
AddTrailEntry	Both	X	For the person specified, adds an audit trail entry to the pertinent data structure (unsaved audit list).
CommitTrail	Both	X	Removes the uncommitted elements from the unsaved list and puts them on the saved list, and writes to the database or file if the cache size has been reached.
CrashRecover	File only	X	Saves file from local system to the Siebel file system.
Kill Unsaved Trail	Both	X	Kills the unsaved audit trail; this happens on an UndoRecord.

The easiest way to use these methods is through a workflow process. If you want to stop or restart the Audit Trail Engine, create a new workflow process or reuse an existing one, and then create a business service node that implements the Stop method or the Start method. For more information about workflow processes, see *Siebel Business Process Designer Administration Guide*.

Audit Trail Business Scenario

As an administrator, you have set up the operations, fields, responsibilities, positions, and employees to be audited (see "Configuring Audit Trail in Siebel Tools" on page 124). You discover that a record has been accidentally deleted from the Contact business component. You know when it was deleted but you want to know who deleted it. You go to the Audit Trail Item list in the Audit Trail Item view. There you query for the Contact business component records and the day the record was deleted (see "Viewing Audit Trail Records" on page 134). Audit Trail returns a set of records. You browse through these records in the Audit Trail Item list. When you find the applicable record, you view the data before it was deleted and determine the time it was deleted, and who deleted it.

Audit Trail Process Flow

Figure 4 shows the process flow for setting up Audit Trail.

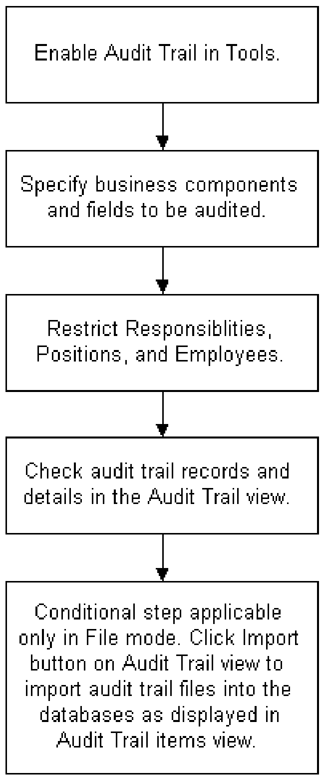


Figure 4. Audit Trail Workflow

Configuring Audit Trail in Siebel Tools

In the preconfigured Siebel application, the Audit Trail functionality is disabled. By enabling the Audit Trail business service within Siebel Tools, Audit Trail is enabled for all application objects. However, you can turn off Audit Trail for individual applications by inactivating the Audit Trail application event service for that application's object. For custom application objects, you must add an Audit Trail application event service to the application object in order to use Audit Trail.

NOTE: Audit Trail does not create history records for predefault values; predefault values are assumed to be part of the initial record.

To enable the Audit Trail Engine business service

1. Launch Siebel Tools.
2. In the Object Explorer, select the Business Service object, and then select the Business Service User Prop object.
3. Select Audit Trail Engine in the Business Services object list.

4 Configure the Business Service User Properties to use the following values:

Name Field	Value Field	Description
Audit Source	TABLE	Can be TABLE or FILE. Signifies the database or file auditing mode in which you are going to run Audit Trail.
Cache Entries Size	1	The number of records to cache before writing the audit trail records for the selected mode. For example, if this field is set to 10 and Audit Source is running in FILE mode, then after the user makes 10 audited changes for a particular business component, the Audit Trail engine creates one file in the Siebel file system. When running in TABLE mode, you should use the default value of 1 because there is no performance gain from increasing this value.
Enable	TRUE	Can be TRUE or FALSE. Determines the current state of the Audit Trail.

NOTE: Audit Trail data is cached by the business service and only written out when the number of Audit Trail changes exceeds the specified cache size. You can also flush cached entries by logging out of the current session and then logging back in to check the Audit Trail data.

To disable Audit Trail for an application

1 Launch Siebel Tools.

2 In the Object Explorer, double-click the Application object to expand it and select Application Event Services.

3 In the Application Event Services list, inactivate the Audit Trail Engine business service record. (Look for a record with the following values.)

Name Field	Value Field
Business Service	Audit Trail Engine
Event Name	Start
Method Name	Start

Use the following procedure to enable a customized application object for auditing, or to re-enable an application object that has been turned off.

To configure an application for Audit Trail

1 Launch Siebel Tools.

2 In the Object Explorer, double-click the Application object to expand it and select Application Event Services.

3 In the Application Event Services list, add the following record if it does not already exist.

Name Field	Value Field
Business Service	Audit Trail Engine
Event Name	Start
Method Name	Start
Name	Start
Sequence	1 or the next available sequence number

About Using Audit Trail with Object Interfaces

When accessing an Application Object Manager through object interfaces such as COM Data Control and Java Data Bean, Audit Trail is not started automatically. In these cases, you must invoke the Audit Trail Engine business service explicitly.

Specifying Business Components and Business Component Fields for Audit

You administer the business component and the business component fields to be audited.

To configure the business component and business component fields to be audited

1. From the application-level menu, choose View > Site Map > Audit Trail Administration > Audit Trail.
2. In the Audit Trail Buscomp list, add a new record and complete the necessary fields. Some fields are described in the following table.

Field	Description
Copy	Select if you want to audit the Copy operation.
Delete	Select if you want to audit the Delete operation. Clear this field if you want to make sure that the delete operation was not audited.
End Date	Date on which the auditing stops. To turn Audit Trail off for an individual business component, set the End Date to a date that has already passed.
New	Select if you want to audit the New operation.
Restriction Type	Specifies whether or not there is a rule determining who gets audited.
Start Date	Date on which the auditing starts.
Update	Select if you want to audit the Update operation.

3. In the Field list, add a new record for the field you want to audit.
4. Repeat Step 3 until the Field list shows all the fields in that business component that you want to audit.

To disable individual business components

1. From the application-level menu, choose View > Site Map > Audit Trail Administration > Audit Trail.

2 Use one of the following methods to disable Audit Trail:

- In the Audit Trail Buscomp list, enter an end date prior to today's date in the End Date field.
- In the Audit Trail Buscomp list, delete the record for the business component.

Specifying Audit Trail Restrictions

You can restrict who gets audited by user, position, or responsibility.

For example, if you set the Restriction Type to “Users” on the Audit Trail Buscomp Fields view, you then go to the Audit Trail Users View and add the users whom you want to audit. Restriction by responsibility or position works in the same way.

To restrict by user

1. From the application-level menu, choose View > Site Map > Audit Trail Administration > Audit Trail.
2. Click the User tab.
3. Select a business component entry in the Audit Trail Buscomp list.
4. Change the Restriction Type field to User.
5. Select the Audit Trail User list and add records.

   Only these users will be audited for the operations on this particular business component.

To restrict by position

1. From the application-level menu, choose View > Site Map > Audit Trail Administration > Audit Trail.
2. Click the Position tab.
3. Select a business component entry in the Audit Trail Buscomp list.
4. Change the Restriction Type field to Position.
5. Select the Audit Trail Position list, and add records.

   Only these positions will be audited for this particular business component.

To restrict by responsibility

1. From the application-level menu, choose View > Site Map > Audit Trail Administration > Audit Trail.
2. Click the Responsibility tab.

3. Select a business component entry in the Audit Trail Buscomp list.
4. Change the Restriction Type field to Responsibility.
5. Select the Audit Trail Responsibility list and add records.

   Only these responsibilities will be audited for this particular business component.

Verifying Audit Trail Configuration

The following steps are part of the verification process to make sure that the business component and business component fields were specified correctly.

To verify audit trail records

1. In your Siebel application, go to the view for the business component that you want to audit.
2. Make a change to the data in that view.
3. If you are using database auditing, verify audit creation as follows:
   a. From the application-level menu, choose View > Site Map > Audit Trail > Audit Trail Items.
   b. In the Audit Trail Items list, make sure there is a new record showing the changes that you made to the business component by querying the business component and field values.
4. If you are using file auditing mode, verify audit creation as follows:
   a. Exit and restart the application.
   b. From the application-level menu, choose View > Site Map > Audit Trail > Audit Trail.

   NOTE: The Host Computer name in the Audit Trail record is the name of the machine on which the object manager is running. This field is not configurable.

   c. Verify that there is a new record in the Audit Trail list from your previous session and the corresponding Audit Trail Item list displays the changes you made to the business component.

Linking Audit Trail to a Business Component

In some circumstances, you might need to link the Audit Trail view to a specific business component view. For example, a Call Center team might want to see the Audit Trail records for individual service requests. Using Siebel Tools, you can create a view that would allow the Call Center team to see these Audit Trail records, if the following conditions are met:

- Audit Trail must be running in database auditing.
- You must be able to audit the business component you are linking to Audit Trail. For information on determining if a business component can be used in Audit Trail, see "Audit Trail Constraints" on page 117.

NOTE: Because audit trail item records are not routed to mobile Web clients, data in these linked views can only be displayed in Siebel Web client and the Siebel Dedicated Web client. Make sure that mobile clients do not have access to views displaying audit trail data.

To link Audit Trail to a business component

1. Launch Siebel Tools.
2. Create a link between the Audit Trail Item 2 business component and the business component to which you are linking Audit Trail. Set the parent business component property of the link to the name of the audited business component.

   For example, if you are configuring the view to show the audit trail records for the Product Defect business component, the parent business component should be Product Defect. The Child Business Component for the link should be Audit Trail Item List 2. The Source and Destination Fields for the link should be Id and Record Id respectively.
3. Modify the business object for the business component to which you are linking Audit Trail. You need to add Audit Trail Item 2 as one of the business object components and specify the Link property as the link you created in Step 2.
4. Create a view which has an applet based on the selected business component as a parent and the Audit Trail Item List 2 applet as a child.

5. Add this view to a screen.
6. Launch a Siebel employee application.
7. From the application-level menu, choose View > Site Map > Application Administration > Views and add the new view to the list of views.
8. From the Show drop-down list, choose Responsibilities, and add the new view to applicable responsibilities.

Viewing Audit Trail Records

After you have set up the fields, operations, responsibilities, positions, and employees to be audited, you can read the results of the audit trails in the Audit Trail view and the Audit Trail Items view.

Audit Trail View for File Auditing Mode

When you use file auditing mode, the Audit Trail list in the Audit Trail view provides a list of files that have been audited for each user, business component, and session. The Audit Trail Items list gives details of the selected file record. You have to import files into the database to have a comprehensive view; otherwise, you can view records on a file-by-file basis only.

CAUTION: You should purge and archive your records from the Siebel audit table S_AUDIT_ITEM regularly to prevent the table from becoming too large. Carry out these operations directly at the database level using native SQL. There is no EIM interface table corresponding to the S_AUDIT_ITEM table.

To import audit trail items from a file into the Siebel database

1. From the application-level menu, choose View > Site Map > Audit Trail > Audit Trail.
2. Select a record in the Audit Trail Buscomp list.
3. In the Audit Trail Item list, click the menu button and select Import Audit Trail Item.

   The audit trail items are imported into the table.
4. From the Show drop-down list, select Audit Trail Items.

   NOTE: If you go back to the Audit Trail view and try to import audit trail items that you have already imported, you will not be able to import them.

To view audit trail records and record details

1. From the application-level menu, choose View > Site Map > Audit Trail > Audit Trail.
2. Select a record in the Audit Trail list.

   The Audit Trail Items list displays details of the selected record.

Querying Audit Trail Information

After recording or importing Audit Trail records into the database, you can query Audit Trail information in the Audit Trail Items view. For example, you can query Audit Trail items to determine changes made by team members, dates, or operations performed on a business component.

To query audit trail information

1. From the application-level menu, choose View > Site Map > Audit Trail > Audit Trail Items.
2. Query the list for Audit Trail items of interest.

6 Message Broadcasting and Alerts

This chapter explains the procedures necessary to administer message broadcasting and alerts for Siebel applications.

As an administrator, you can use message broadcasting and alerts to make sure that specific users get the necessary and time-critical information they need, displayed in a format that does not interfere with their work in progress.

About Message Broadcasting

Message broadcasting provides a platform for administrators and other users with access to the Message Broadcasts view to send important information directly to users' screens. Typically, this information is time-critical, such as a due date, or it is updated frequently, such as a call queue's status.

For example, to help agents manage their workflow and respond appropriately to calls, call centers may try to keep agents up-to-date on key statistics about call queues, such as the number of calls waiting, the average time in queue, and other important data. Traditionally, these statistics are displayed on a scrolling LED "ticker" on the wall. This approach presents several problems:

- Agents have to look away from their screens to view the information.
- Agents can miss important information, if they do not look at the right time.
- Agents often get information that is not relevant to them.

Message Broadcasting addresses these problems by allowing administrators to send relevant messages to individuals, groups, or an entire team. The messages can be displayed by one of the following two methods:

- Scroll messages in the message bar across the bottom of a user's screen, visible at all times.
- Display messages in a dialog box in the middle of the screen, in addition to scrolling across the bottom of the screen.

Message Broadcasts can be created through the administration view, automatically from Siebel Business Process Designer, or remotely from a third-party application through Siebel eAI.

Message Broadcast messages are retrieved from the Message table through the Siebel application server and sent to the message bars of the targeted Siebel Web client sessions. There is no set order for the messages to appear on the message bar, that is, the order cannot be controlled by the administrator or the end user.

Users can disable their scrolling message bar, but the administrator can override this setting for broadcast messages.

About Alerts

Alerts provide a platform for administrators and other users with access to the Alert Administration view to send long, complex, and customized messages directly to selected groups of recipients. Typically, these messages are time-critical, but also need to have associations with data in the company database (for instance, literature or products) and to be customized for the recipient.

For example, to communicate product pricing changes to a sales team with members around the world, a sales manager would want to be able to distribute new pricing structures and product information as soon as they are approved. Traditionally, this would be done with email messages, phone calls, or mailed literature. This approach presents some problems:

- To provide the necessary details, a large quantity of information may need to be distributed, with file attachments or links provided by the manager.
- Different team members may require different price list or product information, depending on their organization, division, or position.
- Distributing information to remote team members may produce a communication lag time.

As an administrator, you can use alerts to make sure that the specific users get the appropriate information that they need.

Features of alerts include the following:

- The abstract of alert messages are displayed in an applet on the recipients' home page, listed in order of the priority specified by the sender. Recipients can click on the abstract to read the entire message.
- Literature items and products can be associated with alerts.
- Access to price list and product information available to different team members may be controlled by organization, division, or position.

Business Scenario for Using Alerts

This scenario provides an example of a process flow performed by an administrator and sales manager. Your company may follow a different process flow according to its business requirements.

A multinational software development corporation uses the Siebel Sales application to automate their sales workforce. The company is organized geographically by division for the purpose of access control, and alerts are enabled.

An international sales manager has just been given the go-ahead for a new set of software product bundles, which include one new product. He needs to communicate these price changes to his company's sales force as soon as possible. Because pricing varies by geography, each of the four major geographical regions represented by his company's four sales divisions need to receive a customized message about the new product bundles. He tells the Siebel administrator the details of the alert message that needs to be sent.

The Siebel administrator creates the alert message, and associates a price list and the new product with the message. She creates keywords that users will be able to search on to find the message at a later date, if necessary.

When the Siebel administrator sends the alert, a customized message is sent to all members of the international sales force, with the appropriate price list for their division associated. Each member sees the alert message on their home page upon login to the Web client or downloads alerts during synchronization. These users can navigate through the home page or Site Map to read the text and any associated literature items or products.

Example Process Flow for Message Broadcasting and Alerts

This is an example process flow for administering message broadcasting and alerts. Your company may follow a different process flow according to its business requirements.

1. **Enable message broadcasting.** For information, see "Enabling and Disabling Message Broadcasting" on page 142.
2. **Create a Message Broadcast.** For information, see "Creating a Message Broadcast" on page 145.
3. **Optionally, create script to automatically update broadcast message text.** For information, see "Creating Broadcast Messages with Multiple Severity Levels" on page 147.
4. **Create an alert.** For information, see "Creating Alerts" on page 152.

Enabling and Disabling Message Broadcasting

By default, message broadcasting is enabled. As an administrator, you can enable or disable message broadcasting at the server level using the following modes:

- Always enabled
- Always disabled
- User enabled (default)

To enable or disable message broadcasting at the server level

1. From the application-level menu, choose View > Site Map > Server Administration > Components.
2. In the Components list, choose the object manager for the application, for example, Field Service Object Manager (ENU).
3. Click the Component Parameters view tab.

4 In the Component Parameters list, select the Application Message Bar Flag record and edit the Current Value field, referring to the following table:

Parameter Value	Description
TRUE	Message broadcasting is always enabled. Users cannot disable message broadcasting by setting their personal preferences. For a Web client deployment, the Siebel application will push messages to users. For mobile client users, messages will be synchronized.
FALSE	Message broadcasting is always disabled. The message bar and message broadcast alerts will not appear on users' screens. For a Web client deployment, the Siebel application server will not push messages to users. For a mobile client users, messages will not be synchronized.
User Enable [1]	This is the default setting. Message broadcasting is enabled; however, users can set their user preferences to enable or disable message broadcasting. When a Web client user disables message broadcasting, the Siebel application server will not push messages to the user. When a mobile client user disables message broadcasting, messages will not be synchronized. For information on how users can change user preferences, see *Fundamentals*.

1. Or any value other than true or false.

NOTE: If you set the Application Message Bar Flag parameter to true, you can specify the update interval for the message bar by selecting the Application Message Bar Update parameter and editing the Current Value. The default value is 120 seconds. (If the update interval is less than the SessionTimeout set in the eapps.cfg file, sessions will never timeout.) If you set the Application Message Bar Flag parameter to User Enable, the update interval is a user preference. For more information, see *Fundamentals*.

To enable or disable message broadcasting on mobile and dedicated Web clients

1 Use a text editor to open the .cfg file for your Siebel application.

2 Find the ShowMessageBar parameter in the .cfg file.

For example:

```
ShowMessageBar="TRUE"
```

3 Set the parameter value to TRUE, FALSE, or User Enabled.

See Step 4 in the “To enable or disable message broadcasting at the server level” procedure on page 143 for more information.

NOTE: If you set the ShowMessageBar parameter to true, specify the update interval for the message bar by adding the following line to the .cfg file:

```
MessageBarUpdateInterval = seconds
```

where *seconds* is the interval in seconds between message bar updates (refreshes). The default value is 120 seconds.

---

4 Save and close the .cfg file.

Creating a Message Broadcast

When you create a message broadcast, all connected users that you specify will receive the message immediately upon the date and time you have specified that the message be activated. Mobile users, such as field representatives, will receive the activated messages when they synchronize.

NOTE: To send a message broadcast, you must have responsibilities that include access to the Message Broadcasts view.

To create a message broadcast

1. From the application-level menu, choose View > Site Map > Communications Administration > Message Broadcasts.
2. In the Message Broadcasts list, add a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Abstract	A brief description of the message.
Activation Date/ Time	Date and time at which you want to start broadcasting the message. If the Activation field is left blank, the message is broadcast immediately. *Note:* The date and time are taken from the Siebel server (not from the machine where the client browser is running). Make sure that the date and time are set correctly on the Siebel server.
All	Check this option to broadcast the message to all users.
Briefing Bulletin	Check this option to distribute the message as a bulletin in Siebel *e*Briefings. For more information, see *Siebel eBriefings Administration Guide*.
Broadcast	Required to send the message broadcast to recipient’s message bar. Check this option to broadcast and display the message. If not checked, the message is not broadcast in the message bar at the bottom of the screen.

Field	Comments
Division	The broadcast message is sent to all users associated with the divisions selected in the Divisions dialog box. This field can be used in combination with the Recipient field.
Expiration Date/ Time	Date and time at which you want to stop broadcasting the message. If the Expiration field is left blank, the message will not expire and the message will continue to be broadcast. *Note:* The date and time are taken from the Siebel server (not from the machine where the client browser is running). Make sure that the date and time are set correctly on the Siebel server.
Message	Required to create the message broadcast record. The text you want to send as the message broadcast.This field accepts up to 2,000 characters. To use severity levels within the message text, see "Creating Broadcast Messages with Multiple Severity Levels" on page 147.
Recipient	The broadcast message is sent to all users specified in the Recipients dialog box. This field can be used in combination with the Division field. For an employee name to show up in the Recipient dialog box, the employee must have a position defined and be marked active for that position. If multiple employees occupy the same position, the message will be sent to all of them, even though you only see the active employee on the list. Employees with multiple positions see messages sent to any of their positions, regardless of what position they log in as.
Severity	Required to create the message broadcast record. Choose the severity level to indicate the importance and appearance of the message. To force the message broadcast to appear in an alert box in the middle of the screen, in addition to its appearance on the message bar, select Urgent with Alert.

Creating Broadcast Messages with Multiple Severity Levels

Typically, the appearance of a message broadcast is designated by a single severity level, as specified in the Severity field. Each severity level is associated with a different color. The severity level that you choose determines the color of the message broadcast and how it is delivered.

In addition to using the Severity field to determine the appearance of a message, you can also combine multiple severity levels to create a message broadcast with unique formatting. By adding special tags to the text of a message broadcast, you can change the color of different sections of the message. The following tags are used to combine severity levels in a message:

- [N] for Normal
- [H] for High
- [U] for Urgent

For example, if your message has a severity of normal, but you want specific text to be highlighted, you can tag parts of the text with the code for High or Urgent. Here is an example:

```
The trunk line from [H]Chicago, Illinois [N]is [U]DOWN!
```

The beginning of the message will appear in the color for the severity of the message, Normal; the words *Chicago, Illinois* will appear in the color for High; and the word *DOWN!* will appear in the color for Urgent.

To send a message broadcast with multiple severity levels

1. From the application-level menu, choose View > Site Map > Communications Administration > Message Broadcasts.
2. In the Message Broadcast list, add a new record.
3. Complete the required fields to broadcast your message.

   For descriptions of the fields, see the table in Step 2 in the “To create a message broadcast” procedure on page 145.

4 In the Message field, enter the message broadcast text you want to send.

5 In the Message field, insert severity level tags as necessary to set the appearance of the message broadcast text.

For example: [H] All employees [N] must submit expense reports by [U] April 1, 2002.

Automatically Updating Message Broadcasting Text

As an administrator, you can customize message broadcasting to automatically update message text that changes frequently. For example, a call center's queue statistics frequently change. Every few minutes, an administrator has to update the statistics to make sure agents have the most accurate information. This manual approach is very time consuming and inefficient when dealing with frequently changing data.

You can use Siebel eAI to automatically update message broadcasting text. Your CTI middleware or ACD switch can provide the data for the Siebel application to distribute.

The Broadcast Message business component manages the messages. The fields of this business component are listed and described in Table 13. These field names are necessary for developing the integration object.

Table 13. Field Names for the Broadcast Message Business Component

Field	Description
Abstract	Short summary for identifying the purpose of a message, such as "Calls In Queue"
Activation Date/ Time	When the message broadcasting should begin
All	To broadcast the message to all employees with positions defined
Body	The text of the message displayed in the message bar
Division	Used to set recipients using division
Division Id	The internal identification value for Division
Expiration Date/ Time	When the message broadcasting should end
Position	Used to set recipients using position
Position Id	The internal identification value for Position
Recipient	Used to set recipients using employee
Recipient Id	The internal identification value for Recipient

Table 13. Field Names for the Broadcast Message Business Component

Field	Description
Type	Severity of the message as defined in the List of Values type BRDCST_MSG_TYPE
Via Broadcasting	To send the message using message broadcasting
Via Interactive	To send the message via Siebel eBriefings

A sample Visual Basic (VB) script follows, which demonstrates how to create and update a broadcast message with information, using the call center queue as an example. The sample Visual Basic script is generic; your CTI middleware's API determines the structure of syntax like the Msg command.

Sample Message Broadcasting Script

The script can be created through a button, an Excel macro, or another VB application. Because it is a script and not an application, it does not need the VB Set command. All the commands are standard to VB coding.

This script is designed to update a message without an expiration date, not to create a new message every time. For more information on how to get or create a Siebel Application Object, see *Siebel Tools Online Help*.

CAUTION: The code in this example updates single value fields. For information on how to update multi-value fields, see *Siebel Tools Online Help*.

```
'Get "Broadcast Message" BusComp
   Set BusObj = SiebelApplication.GetBusObject("Broadcast
      Message", errCode)
   Set BusComp = BusObj.GetBusComp("Broadcast Message", errCode)

'Find "Calls Waiting" message
   BusComp.SetSearchSpec "Abstract", "Calls In Queue", errCode
   BusComp.ExecuteQuery 0, errCode
   If BusComp.FirstRecord(errCode) <> True Then
```

```
'We need to create a new message
      BusComp.NewRecord 0, errCode
      BusComp.SetFieldValue "Abstract", "Calls In Queue", errCode
   End If

'Prepare message using middleware API info.
   Set Msg = "[N]Calls Waiting: [U]10"

'Update the record
   BusComp.SetFieldValue "Body", Msg, errCode
   BusComp.SetFieldValue "All", "Y", errCode

'Write the record
   BusComp.WriteRecord errCode
```

In addition to writing a script, you can use Siebel Business Process Designer to create or update a broadcast message. For more information, see *Siebel Business Process Designer Administration Guide*.

Creating Alerts

When you create an alert, all connected users that you specify will receive the alert immediately upon its activation date and time. Mobile users, such as a sales force, will receive an activated alert upon synchronization.

NOTE: Before creating alerts, review *Release Notes* for information about Alerts (Message Alerts).

To create and send an alert

1. From the application-level menu, choose View > Site Map > Alert Administration.
2. In the Alerts list, add a new record and fill in the appropriate fields in the list and More Info form.

   Some fields are described in the following table.

Field	Comments
Priority	The priority of the message determines where the message appears in the list of alerts on the users' home pages. Messages with the highest priority will be at the top of the list.
Keyword	Enter keywords that the user will be able to search on to find this message.
Type	The type chosen from the drop-down list helps determine who will receive the alert, as follows: ■ Employee Home Page Alert: Displays the alert on all employees' home pages. ■ Partner Alert: Displays alerts to employees of registered partner companies. ■ Program Information: Displays the alert to self-registered, individual partners. ■ Public Information: Displays the alert to unregistered, anonymous users.

Field	Comments
Abstract	Enter a brief abstract that summarizes the message. This will appear as a hyperlink on the appropriate users' home pages.
Activation	Enter the date when the message will first appear to users.
Expiration	Enter the date when the message will no longer appear to users.
Partner Alert	Indicates that the alert is intended for partner companies. Make sure that this field is selected so that your alert will be seen.
Employee Alert	Indicates that the alert is intended for employee users. Make sure that this field is selected so that your alert will be seen.
All Users	Select this box if you want the alert to appear to all users, as indicated by the Employee Alert or Partner Alert check boxes. For example, if the Employee Alert check box is checked, and the All Users check box is checked, all employees will receive the alert.
Message Body	Type in the text of the message, including HTML formatting code if desired. Alerts can be enhanced by using the following HTML formatting codes: ■ text = bold ■ <u>text</u> = underline ■ <i>text</i> = italics ■ text = font size ■ <a>href="http:text" = hyperlink to Web page or site
Message Body Preview	Displays message as it will look to users.

3 If you want to add literature as an attachment to the message:

a Click the Literature view tab.

b In the Literature list, click Add.

c. In the dialog box, select the Literature record or records you want to add, and click OK.

NOTE: Only literature of type Sales Tool can be added.

---

4. If you want to add a product as an attachment to the message:
   a. Click the Product view tab.
   b. In the Product list, click Add.
   c. In the dialog box, select the product or products you want to add, and click OK.
5. If you want to specify the recipients of this message:
   a. Click the Recipients view tab.
   b. From the Show drop-down list, select Recipient Divisions or Recipient Positions, and click Add.
   c. Select the record or records you want to add, and click OK.

   Remember, if you selected the All Users check box in Step 2 on page 152, the message will automatically be sent to all recipients.

Messages 7

This chapter describes the administrative setup tasks that need to be performed before the Messages screen and views are used.

For more information about the Messages screen and views, see *Siebel Call Center User Guide*.

NOTE: The Messages functionality is unrelated to the message broadcasting and alerts discussed in Chapter 6, "Message Broadcasting and Alerts."

Setting Up the Messages Workflow

To set up workflows for the Messages screen and views

1. Make sure that the Communications Management and the Workflow Management component groups are enabled.

   For information, see *Siebel Business Process Designer Administration Guide.*

2. Activate the Messages workflow policies. All Messages workflow policies are in the Siebel Messaging policy group.

   For information about activating workflow policies, see *Siebel Business Process Designer Administration Guide.*

3. Activate Siebel Message send email and Siebel Message send email for activity owner workflow processes.

   For information about activating workflow processes, see *Siebel Business Process Designer Administration Guide.*

Setting Up Users with the Message User Responsibility

Users with the Message User responsibility have access to the Messages views.

To set up users with the Message User responsibility

1. Navigate to Applications Administration screen > Responsibilities view.
2. Make sure that all users who need access to the Messages views are assigned the Message User responsibility.

   For more information about setting responsibilities for users, read about defining responsibilities in *Security Guide for Siebel eBusiness Applications*.

Content Center 8

This chapter describes the features of Content Center.

Content Center allows you to create and manage authored content, which includes items such as price lists, service solutions, and static Web site content, for Siebel eBusiness Applications.

Content Center features include:

- **Preview and simulation.** You can use a content staging environment to preview and test content before you publish it to your production environment. The staging environment displays content exactly as it will appear to customers, employees, and partners in your production environment. The staging environment runs on a separate database from the production environment.

- **Content projects.** You can group a set of content items into one content project, so that related changes can be made together. For example, you can create a content project to manage all the products, catalog categories, price lists, and marketing literature for your company's summer catalog.

- **Content Asset Management.** You can use the content asset repository for storing and managing unstructured content as assets and sets of assets. Content Asset Management establishes check-out and check-in procedures to serialize access to content, and prevent changes from being lost by users trying to update content simultaneously. Content can be rolled back to earlier versions if the changes made were unsatisfactory.

- **Approval processes.** You can use Siebel Business Process Designer to design approval processes that allow team members to review a content item before it is published. Siebel Business Process Designer allows you to assign tasks based on a predefined list of content contributors and approvers.

- **Publishing.** After content is approved, Content Center uses Siebel Business Process Designer to publish it to a production environment. The XML-based publication service can handle both complex database content and unstructured content that is stored in the file system. This component helps maintain transactional integrity between all the items in a content project.

Content Center Job Roles and Terms

Descriptions of Content Center job roles are in Table 14, and terms are defined in Table 15.

Table 14. Content Center Job Roles

Position	Responsibilities
Content Administrator	One or more people in your business who are authorized to administer content. These people will need to understand your business requirements in order to know what types of content and content items will need to be managed and the appropriate contributor and approver workflows. Depending on your business requirements, one or more of these people may also be responsible for selecting and possibly configuring the appropriate business components, content objects, and content types. Alternatively, this may be done by an application developer.
Content Contributor	A person in your business who is authorized to contribute content items. Examples are technical writers, Web designers, and graphic artists.
Content Approver	A person in your business who is authorized to approve content posted to your company's Web site. Examples are managers and your company's attorneys.

Table 15. Content Center Terms

Term	Definition
Content	The components of the application that are authored, as opposed to application code. Siebel applications recognize the following classes of content: ■ Business rules, such as personalization rules and assignment rules ■ Application content, such as product catalog, price lists, and product promotions ■ Web content, such as Web templates and static Web pages, typically stored as HTML, XML, and image files ■ Documentation, such as product data sheets, forms, and white papers Content Center provides content production services for three of the classes listed above: application content, Web content, and documentation, while content asset management only applies to Web content and documentation.
Content Asset	An instance of content managed within Content Center and stored in the content asset repository. Content assets are typically comprised of unstructured markups and can be related to other content assets. For example, an HTML content asset can link to other pages or reference images.
Content Item	Represents a transaction (add, update, delete) stored and associated with a piece of content.
Content Object	Specifies the information that will be transferred from the staging environment to the production environment when the content is published. Each content object is composed of a business object and an integration object.

Table 15. Content Center Terms

Term	Definition
Content Type	A set of business rules you define for handling content, including rules that apply to the approval workflow, contributors, approvers, and the application views your company uses to edit or preview content. Each content type is based on a content object, and is associated with an approval workflow and a group of contributors and approvers. The following are examples of content types authored in Siebel applications that can be managed through Content Center: ■ Siebel eCatalog: catalog, categories, product, product line, and product literature ■ Siebel ePricer: price list, pricing factor, rate list, and volume discount ■ Siebel Marketing: offers (Web, phone, eMail, direct mail, newsletter), campaign, and marketing development fund ■ Siebel Service: service solution, decision issue, resolution document, and smart script
Content Asset Type	The file type (or filename extension) of a content asset, for example HTML, GIF image, or plain text.

Setting Up a Content Staging Environment

A content staging environment is similar to a test environment, except that you use it to test content rather than application configuration. This allows you to develop and test new content without affecting your production applications.

After content is approved, Content Center uses Siebel Business Process Designer and an XML-based content publication service to send it to the production environment. For more information about Siebel workflows, see *Siebel Business Process Designer Administration Guide*.

Required Components for a Content Staging Environment

Content Center requires a separate Siebel eBusiness Applications installation for your content staging environment. The physical hardware for this environment should be the appropriate size for supporting the number of content center administrators, contributors, and approvers who will manage your business content.

For more information about installing Siebel eBusiness Applications, see the *Siebel Server Installation Guide* for the operating system you are using.

Your staging environment should contain the following components:

- Database
- Gateway Server
- Siebel Server
- File System
- Web Server and Siebel Web Extension

Maintaining Consistency Between Staging and Production Environments

It is important that the staging and production environments are consistent when Content Center is implemented.

The most important element to keep synchronized is the Siebel repository (.srf) file. This file defines the structure of the application data, for example, the business components and the integration objects.

Keeping the data synchronized is not relevant, with the exception of *content* and related data. For example, if you use Content Center to manage product literature, then Content Center synchronizes the content by publishing it from staging to the production environment. In this case, products could be related data that also need to be kept synchronized. Although you may have chosen not to manage products through Content Center, nevertheless you must have a user key, such as product ID, that exists in both the staging and production environments so that the association of a piece of literature to a product can be made in the staging area and reproduced in the production environment.

The following are some tips to help you maintain consistency between your staging and production environments.

- If your production environment has not yet been installed, the database administrator should install two separate database instances (one for staging and one for production) using an identical Siebel repository (.srf) file, and initialize both instances with the same seed data. This will make sure that the content object definitions in your staging and production environments are the same.

  For more information, see the *Siebel Server Installation Guide* for the operating system you are using and *Siebel Tools Reference*.

- If your production environment is already active, the database administrator should install the staging environment using the same Siebel repository (.srf) file as used for the production environment. Make a copy of your database and use the copy to initialize your staging environment.

- Because you will perform most or all content administration tasks in your staging environment, you should either disable or limit access to the appropriate content administration views in your production environment. This will help prevent administrators from accidentally making updates in the production environment.

Business Scenario for Using Content Center

This section describes business scenarios for using Content Center.

Business Scenario for Content Center

This scenario provides an example of a business scenario performed by a content administrator (in this case, the business manager), a Web site designer, an application developer, and content contributors and approvers. Your company may follow a different process flow according to its business requirements.

The business manager and Web site designer have designed the company's Internet home page. The page includes a section which will display a single targeted Web offer to customers visiting the site. The contents of this section will require a managed contribution and approval process to produce accurate and timely display of product offers.

First the application developer makes an Offer business component that is content-enabled and defines the Web Offer content type. Then he works with the business manager to develop some personalization rules to target the Web offers, tests the home page, and deploys the home page to the production environment.

The business manager is concerned that the graphics contained in various Web offers may clash with the company logo, so she edits the single approval workflow for the Web Offer content type. She adds an additional approval step for the site designer position, and associates the appropriate contributor and approver positions to those steps in the approval workflow.

Next, she configures the publication workflow, setting the connect string for the server in the production environment.

She then sets up the content project, adding the content items that make up tasks required to create the Web offer. These will be routed to the Content Inboxes of the content contributors and approvers as set up in the approval workflow.

After the content items have been completed and approved, she publishes the project to the production environment.

Business Scenario for Content Asset Management

Content Asset Management is typically used in conjunction with other screens in the Siebel eBusiness Application, for example Microsite Management and Group News. For sample business scenario where Content Asset Management is used, see "Business Scenario for Microsite Management" on page 209.

Example Process Flow for Using Content Center

These are examples of process flows for using Content Center and Content Asset Management. Your company may follow a different process flow according to its business requirements.

Figure 5 illustrates the process flow for the "Business Scenario for Content Center" on page 166.

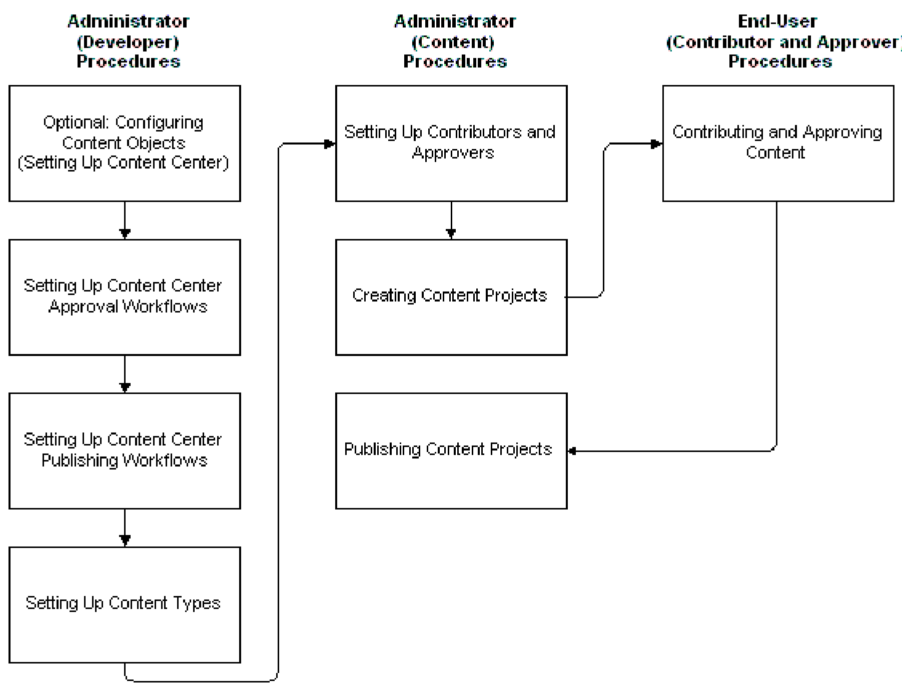


Figure 5. Example Process Flow for Content Center

Configuring Content Objects for Content Center

The content object definition specifies the information that will be transferred from the staging environment to the production environment when the content is published.

Content objects are based on business objects and integration objects. Siebel Systems provides some prebuilt content objects which you can use, or configure to meet your business needs. See Appendix B, "Content Center Reference" for details about the prebuilt content object definitions.

You use content objects to create one or several content types. Each content type is based on a content object, and is associated with an approval workflow and a group of contributors and approvers. For example, from the Product content object, you might create two different content types: Software Products and Hardware Products. These two content types may have different approval workflows, as well as different contributors and approvers. For more information, see "Setting Up Content Types" on page 180.

The main steps involved in setting up content objects are:

- Use Siebel Tools to identify or define the business object on which you will base the content object. For more information, see *Siebel Tools Reference*.
- Modify the business components to meet the content object requirements. For instructions, see "Modifying Business Components for Content Center" on page 170.
- Use the EAI Object Wizard in Siebel Tools to create an integration object. For instructions, see "Creating Integration Objects for Content Center" on page 172. For more information, see *Siebel Tools Reference*.
- Modify the integration object to meet the content object requirements. For instructions, see "Modifying Integration Objects for Content Center" on page 173.

NOTE: You do not need to create content objects for content assets. These are provided with the preconfigured product.

Modifying Business Components for Content Center

NOTE: This step is potentially recursive. Complete this step before using the EAI Wizard in Siebel Tools to create integration objects.

After you have identified or defined the business object on which your content object will be based, check its business components for underlying tables that contain foreign keys to other tables. If there are business components with foreign keys, you must modify them to assure the integrity of foreign keys when these objects are published.

Typically, you need to follow one of the following two processes to modify the business components.

Modify the business components containing foreign keys:

1. Create a join in the business component from each foreign key column to the row_id of the foreign key's table.
2. Create fields in the business component for all user key columns in the foreign key's table. If any of these columns are foreign keys, repeat Step 1.
3. Assign a PickList and fill the PickMap with the foreign key and all related user key fields, including any intermediate foreign key fields.
4. Add Pick Map UpdOnlyIfNull columns for each Id type column in the Pick Map.

   The UpdOnlyIfNull column should be the same one as its parent on the Pick Map.

Or, if the business component table contains a foreign key to a child (or other descendent) object in the business object:

1. Create a Multi Value Link to the business component on the foreign key table.
2. Include the entire foreign user key as multi-value fields. Expand foreign keys in the user key by joining and adding fields to the Multi Value Link business component.

3 Set the Primary Id field of the Multi Value Link to the foreign Key column.

NOTE: To resolve foreign keys to child (descendent) objects in the correct order, you must specify a sequence number and XML sequence number for the resulting integration object.

If two business components joined by a foreign key contain user key columns of the same name, create different field names for each user key column. Table 16 shows an example.

Table 16. Example: How to Handle Identical User Key Column Names

Business Component	User Key Columns	Comments
Internal Product Sales Tool	BU_ID	This is a foreign key from the Internal Product Sales Tool business component to the Organization business component.
	NAME	This is a _U1 user key column in the Internal Product Sales Tool business component. This user key column name is identical to the one in the Organization business component described below. In the Internal Product Sales Tool, create a field called Name to map to this column.
Organization	NAME	This is a user key column in the Organization business component. This user key column name is identical to the one in the Internal Product Sales Tool business component described above. In the Internal Product Sales Tool, create a field called Organization Name to join to this column.

NOTE: Later, you will disable all other user keys, so you only need to check for duplicate names in your business component's _U1 table user key.

Creating Integration Objects for Content Center

Integration objects are sometimes called EAI objects, because they use Enterprise Application Integration (EAI) technology. You use the EAI Object Wizard in Siebel Tools to create integration objects. For more information, see *Integration Platform Technologies: Siebel eBusiness Application Integration Volume II*.

To create an integration object

1. In Siebel Tools, select File > New Object.
2. From the dialog box, select Integration Object.

   The EAI Object Wizard guides you through the process of setting up an integration object.

After you create the integration object, you need to modify it to meet the requirements for a content object. For instructions, see "Modifying Integration Objects for Content Center" on page 173.

Modifying Integration Objects for Content Center

Use the following guidelines to modify integration objects to meet content object requirements.

To modify integration objects:

- In the integration object, make sure that the link that defines the parent to child relationships allows update and delete. If the link does not allow those operations, replace it with a link that does.
- In the integration object user properties, add AdminMode, value Y. This gives the EAI Siebel Adapter permissions to do synchronization against a Siebel database.
  - Disable these types of integration components:
    - All calculated fields.
    - All integration components created from Multi-Value Link (MVL) components, unless your business requires that you transfer those multi-values to your production environment.
    - If more than one field is mapped to a table column, all fields except one.
    - For integration components that have file attachments, the field that stores the file revision number. For example, in the Admin Sales Tool integration component, disable the LitFileRev field.
  - In the integration component, disable:
    - The NoDelete, NoInsert, and NoUpdate user properties.
    - All user keys except the one that is based on the _U1 table user key, which is used for integration between the two Siebel databases.
    - All identification (Id) fields. (Make sure that each field is listed in the Pick Map UpdOnlyIfNull list of its entry in the pickmap for the user key of its join table.)

Setting Up Content Center Approval Workflows

You can use Siebel Business Process Designer to manage workflows for the content item approval process. When the Start Project or Request Start Project action is invoked on a content project, the approval workflows associated with each content item in the project are instantiated.

Approval workflows allow you to specify the structure for contributing, reviewing, and approving content. The designated contributors and approvers are notified by new records in their Content Inbox at the appropriate step in the content production and approval process. For more information about designating contributors and approvers, see "Setting Up Content Types" on page 180.

A state model and some workflows are associated with the approval workflow included in the seed data that is provided in Siebel applications. You can use these processes in your deployment, modify them to meet the needs of your business, or simply use them as a guide for creating your own approval workflows.

For more information on creating or modifying workflows, see *Siebel Business Process Designer Administration Guide.*

NOTE: All Content Center workflows should be placed into the Content Center group.

About the Content Item State Model

A state model, called Content Item Status, controls the status changes of a content item.

Table 17 describes each of the content item states.

Table 17. Content Item Status

State	Description
Pending Submit	Applied by the workflow process. If the current task in the workflow is a Contribute task, the workflow process applies the Pending Submit state to indicate that an end user is expected to perform some action on the content item.
Submitted	Applied by an end user. A content contributor applies the Submitted state to indicate that the actions associated with this content item have been completed.
Pending Approval	Applied by the workflow process. If the current task in the workflow is an Approval task, the workflow process applies the Pending Approval state to indicate that an end user is expected to review the content item.
Approved	Applied by an end user. A content approver applies the Approved state to indicate that the content item has been reviewed and approved.
Rejected	Applied by an end user. A content approver applies the Rejected state to indicate that the content item has been reviewed and disapproved.
Canceled	Applied by an end user. A content contributor or approver applies the Canceled state to indicate that the content item should no longer be included in the current content project.
Completed	Applied by the workflow process. This is a terminal state that indicates that the workflow approval process has been completed for the content item. A content item must be in the Completed state before it can be published.

About the Content Approval (Single Approver) Workflow

The Content Approval (Single Approver) workflow is a simple workflow that demonstrates a single approver approval process. You can use this workflow with or without modification.

The Content Approval (Single Approver) workflow uses these step types to construct the business logic for content item approval:

- **Content Task Subprocess.** This step type is used to indicate that the Content task assigns the content item to an end user to perform some action. Each Content task has a type and a sequence number. The task type is either contribution or approval. The task sequence indicates the Siebel position to which the content item should be assigned, as specified on the content item. This step calls the Content task workflow subprocess. For more details about the subprocess, see "About the Content Task Subprocess."

- **State Decision Point.** This step type performs branching logic in the approval process. The branching logic is based on the state that is applied to the content item after a Content task. For example, a decision point is used to reassign a content item to the originator after it is rejected.

- **State Update Siebel Operations.** The Siebel Operation step type is used to make updates to the content item state.

You can use these workflow components to create new approval workflows or to modify the Content Approval (Single Approver) workflow for your business. For example, if you require two approval tasks, you can add two Content Task Subprocesses and State Decision Points.

About the Content Task Subprocess

The Content Task Subprocess contains the common logic of assigning a content item and waiting for a user action. The parent approval process calls this subprocess each time a content item is assigned to an end user. Calling this task causes the content item to appear in the Content Inboxes for those users associated with the current sequence (TaskSeq).

The parent business process must pass in the input arguments shown in Table 18.

Table 18. Parent Approval Process Input Arguments

Input Argument	Description
Object Id	The content item ID from the parent (Content Approval) to the child (Content Task) Subprocess.

Table 18. Parent Approval Process Input Arguments

Input Argument	Description
TaskSeq	Passes the sequence number of the current task.
TaskType	Indicates that the current task is either type Contribute or type Approve.

The Content Task Subprocess performs these actions:

- Sets the content item state to either Pending Submit or Pending Approve, depending on the TaskType for the current task.
- Sets the content item Current Approval Sequence Number field to the TaskSeq value. This makes the content item visible to the appropriate end users in the Content Inbox view.
- Waits for the end user to take action on the content item and make a state change to the item. When this occurs, the workflow process resumes and returns control to the parent approval process.

About the Auto Complete Workflow

An approval workflow must be run for each content item before a content project can be published. (See "To start the project approval workflow" on page 183.) To publish content without routing it through approvers and contributors, use the Auto Complete workflow. The Auto Complete workflow is a simple workflow, provided with the seed data. It sets the status of a content item to Completed immediately so that the project is ready for publication.

Setting Up Content Center Publication Workflows

The Siebel XML-based publication service can transfer any data that can be accessed through a business component: both complex database content and unstructured content. Transactional integrity is maintained between all the items in a content project.

Project publishing is controlled by Siebel Business Process Designer in order to provide flexibility to the workflows in the publishing process. When a business manager invokes either the Publish or Request Publish action for a project, the publication workflow associated with the project is instantiated.

Siebel applications provide two predefined publication workflows in the standard product:

- Content Publish workflow

  This workflow publishes a content project from a staging environment to a production environment. There is only one step in this workflow, which calls the Content Project business service. You may extend this process to meet your specific business requirements. For example, you may add additional workflow steps to integrate with other systems or wait for a specified period of time before publishing.

- Content Publish to Files workflow

  This workflow is similar to the Content Publish workflow, except that the content project is published to XML files in a specified directory instead of to the production environment.

You can use these processes in your deployment, modify them to meet the needs of your business, or simply use them as a guide for creating your own publication workflows.

For more information on creating or modifying workflows, see *Siebel Business Process Designer Administration Guide.*

NOTE: All Content Center workflows should be placed into the Content Center group.

About the Content Project Business Service

The Content Project business service is designed to publish a content project from the staging environment to the production environment or to publish the content items as XML files. In the publication workflow, the Export method of this business service is called, indicating that the content items in the project will be exported from the staging environment. The publishing target is set using two method arguments, specified as workflow properties:

- **Connect String.** A Siebel connect string, specified as:

  `siebel://`*`namesrvr`*`:2320/`*`enterprise/objmgr/siebsrvr`*

  For example: `siebel://demosrvr:2320/siebel/SCCObjMgr_enu/demosrvr`

  The Content Project business service connects to the specified object manager, such as SCCObjMgr for Siebel Call Center, as the current user and makes the appropriate updates, inserts, and deletes for each content item in the project. These changes are made by the content object in the sequence specified in Siebel Tools for each content object.

- **Export Directory.** The name of a file system directory into which the XML should be placed. For example, c:\temp or \\fileserver\publish\export. The directory must exist and be accessible to the object manager. Specifying this property exports the content items within the project as a series of Siebel XML files. The files will use the naming convention:

  - Upload *content object name*.xml—for content items that are to be added.
  - Delete *content object name*.xml—for content items that are to be deleted in the target system.

NOTE: Detailed information about the other methods in this business service are given in Appendix B, “Content Center Reference.”

Setting Up Content Types

Content types define the business rules for managing a class of content through the creation and approval process.

Each content item is assigned a content type. The content type determines the following for the content item:

- The approval workflows
- Which views are used to preview or edit the content

A set of predefined content types are provided. You can also create new content types according to your business process, as described in the following procedure.

NOTE: Do not confuse *content types* with *content asset types*, which fulfill a different function. For information about content asset types, see "About the Content Asset Types View" on page 202.

To set up content types

1. From the application-level menu, choose View > Site Map > Content Center Administration > Content Types.
2. Create a new record and fill in the necessary fields.

   Some of the fields are described in the following table.

Field	Description
Name	Unique name of the content type.
Content Object	The object chosen from this MVG specifies the information that is transferred during publishing. For more information, see "Configuring Content Objects for Content Center" on page 169.
Approval Workflow	Defines the content contribution, review, and approval process for this content type. For more information, see "Setting Up Content Center Approval Workflows" on page 174.

Field	Description
Content Type Views	A list of the views used to administer or preview content of this type. These views determine the end-user navigation from the Content Inbox. Examples are the destination views for the Item Reference hyperlink, in Step 4 in the "To contribute (add or edit) a content item" procedure on page 186 and the Action hyperlink in Step 5 in the "To contribute (add or edit) a content item" procedure on page 186.
Picklist	Determines the drop-down list that will be used to select content of this type.
Pick Applet	Determines the pick applet that will be used to select content of this type.

Setting Up Contributors and Approvers

After you set up approval workflows for content objects, you must specify contributors and approvers for the content.

When you create a content type, you assign default contributors and approvers to each sequence number. If necessary, these defaults can be overridden (Content Item detail view) when the content item is created.

To set up a contributor or approver

1. From the application-level menu, choose View > Site Map > Content Center Administration > Content Types.
2. Select the content type for which you would like to create a list of contributors and approvers.
3. Click the Contributors and Approvers view tab.
4. In the Contributors and Approvers list, add a new record.
5. In the Position field, select a position from the Pick Position dialog box.
6. In the Seq field, specify a sequence number for the selected position.

   You can specify multiple positions for the same sequence number. Doing so will place the content item into multiple Content Inboxes for this task; however, only one individual will be able to complete the task.

7. In the Comment field, add a default comment for each position.

   Comments are visible to users when they receive the content item in their inbox.

Creating Content Projects

You can use a Content Project to manage the process of adding, editing, and deleting application content. The Content Project provides a virtual folder through which a set of related content item changes can be managed. You use the Content Projects view to create projects, start the project approval workflows, and review content project status.

To create a content project

1. From the application-level menu, choose View > Site Map > Content Center Administration > Content Projects.
2. In the Content Projects list, add a new record, specifying a name and description.
3. In the More Info form Plan Publication Date field, enter the date you plan to publish this project.

   This date does not automatically publish the project.
4. In the Publication Workflow field, select the publication workflow that you will use for this project.
5. Click the Content Items view tab, add a new record to the Content Items list, and complete the necessary fields.

   For each content item, you must specify a descriptive name, a content type, a description of the work to be performed, and a status (Add, Update, or Delete). If the item has a status of Update or Delete, you can also specify the item reference, which allows you to select the specific piece of content that should be changed.

   NOTE: You can change any contributors or approvers for a content item by editing the Contributors and Approvers list.

To start the project approval workflow

1. From the application-level menu, choose View > Site Map > Content Center Administration > Content Projects.

2 From the Content Projects list, select the appropriate content project.

3 On the More Info form, click the menu button and select one of the following:

- **Start Project.** This changes the state of the project from Draft to In Process and instantiates the approval workflows synchronously. This means that users must wait for all workflow processes to begin before regaining control of the user interface. For large projects, this could take several minutes.

- **Request Start Project.** This changes the state of the project from Draft to In Process and instantiates the approval workflows asynchronously on a separate server component, which returns control to users more quickly. This is the recommended method to use for projects that contain thirty or more items. This method requires that the Content Project Start server component is online. (See *Siebel Server Administration Guide* for information about starting server components.)

NOTE: If you add more content items to the project after it is in the In Process state, invoke the Start Project or Request Start Project action again to start the approval workflows for the new content items.

To review status of content project and content items

1 From the application-level menu, choose View > Site Map > Content Center Administration > Content Projects.

2 From the Content Projects list, select the appropriate content project.

The status of the project is given in the More Info form. The table below explains the Project Status values.

Project Status	Description
Draft	The project has been created and the approval workflow has not been started.
In Process	The approval workflow has been started.
Published	The project has been published.

3 Click the Content Items view tab.

You can review the status of each content item, and check or change its assignment. By clicking the Item Reference for a content item, you can preview the current state of the content. See Table 17 on page 175 for possible status values.

Contributing and Approving Content

The Content Inbox is the screen that Content Contributors and Approvers use to interact with the approval workflow. In the My Content Items view users will see any content item currently assigned to their position by the approval workflow, and will be able to drill down on hyperlinks to the appropriate views to contribute, edit, preview, and approve content.

To contribute (add or edit) a content item

1. Navigate to the Content Inbox screen.
2. From the Show drop-down menu, select My Content Items.

   The Content Items list contains all of the content items currently assigned to you by the approval workflow.

   Items that require contribution can be identified by the status Pending Submit.
3. Select an item.
4. For each item, you can perform the following optional actions:
   - Click the Contributors and Approvers view tab to see the positions assigned to the contribution and approval process.
   - Click the History view tab to review actions taken on the item to date.
   - Drill down on Item Reference hyperlink to preview the content item.
5. Drill down on the Action hyperlink and use the associated administration view to add or edit content.

   This link will dynamically take you to the Add/Edit view associated with the content type. If the action is Delete this link is not active. Instead, completion of a deletion task indicates approval to delete the referenced item.

   For more information about editing content assets, see "About Content Assets" on page 190.
6. Return to the Content Inbox using the History button.

7. If the content item is an Add action, update the Item Reference field on the content item to reference the content you just created. Clicking the Item Reference pop-up displays a pick list from which you can select the content record that you just created.

8. Click on the Item Reference link to view the item and verify that it is complete and accurate.

   Return to the Content Inbox using the History button.

9. Add comments as needed to the content item, and change the status of the item as appropriate. For example, change the status from Pending Submit to Submitted.

To approve content

1. View all content items in the Content Inbox and select an item to work on. Items that require approval can be identified by the status Pending Approval.

2. For each item, you can perform the following optional actions:

   - Click the Contributors and Approvers view tab to see the positions assigned to the contribution and approval process.

   - Click the History view tab to review actions taken on the item to date.

   - Drill down on Item Reference hyperlink to preview the content item.

3. Make any comments to the content item, and change the status of the item as appropriate. For example, change the status from Pending Approval to Approved or Rejected.

Publishing Content Projects

After the content for a project has been added and approved, use the Content Center publication workflow to publish to your production environment.

Make sure that:

- You have specified the publication workflow for the project. (See Step 4 in the "To create a content project" procedure on page 183.)
- The status of the project is In Process and the status of each item in the project is Completed.

To publish a content project

1 From the application-level menu, choose View > Site Map > Content Center Administration > Content Projects.

2 From the Content Projects list, select the appropriate content project.

3 Click the menu button, and select one of the following:

   - **Publish.** This changes the state of the project to Published and instantiates the publication workflow synchronously. This means that users must wait for all workflow processes to begin before regaining control of the user interface. For large projects, this could take several minutes.

   - **Request Publish.** This instantiates the publication workflow asynchronously on a separate server component, which returns control to users more quickly. This is the recommended method to use for projects that contain thirty or more items. This method requires that the Content Project Publish server component is online. (See *Siebel Server Administration Guide* for information about starting server components.)

4 If you selected Request Publish in Step 3:

   a From the application-level menu choose View > Site Map > Server Administration > Components.

   b In the Components list, select the Content Project Publish record, and check the task state of the component tasks.

   If publication fails, the task state is “Exit with Error.”

NOTE: A content project cannot be republished, except by creating a new content project, for example by copying the published project.

About Content Assets

Content assets are a special type of content handled by Content Center. Content assets differ from other types or classes of content in that they are stored in the Siebel application's content asset repository. Content Asset Management allows check-out and check-in control and versioning of the content managed as assets.

Content assets are typically unstructured data such as Web pages, images, Microsoft Office documents, and text files.

Defining Content Sets to Contain Content Assets

Content sets are collections of content assets. Every content asset must belong to a content set and should have a unique name within that set. Content sets cannot be nested, that is, content sets cannot be contained within other content sets.

After a content set is defined, you can:

- Add content assets to the set
- Preview the home page asset of the set
- Review the history of the set
- Establish the locks on content assets in the set

Figure 6 shows part of the Content Explorer view; content assets, locks, and history information are shown as children of the content set record.

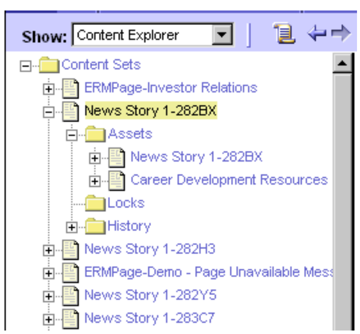


Figure 6. The Content Explorer View

To create a content set

1. From the application-level menu, choose View > Site Map > Content Center Administration > Content Sets.

2 In the Content Set list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Name	A unique name for the content set record.
Title	A short descriptive title for the content set.
Description	Text describing the content set.
Home Page	This field cannot be filled in until there are content assets in the content set. See "Setting the Home Page for a Content Set" on page 195.

Adding Content Assets to a Content Set

Content assets can only be created as child records of a content set.

To add content assets to a content set

1. If necessary, navigate to the Content Sets view (Step 1 in the "To create a content set" procedure on page 191).
2. In the Content Set list, select the content set to which you want to add an asset.
3. Click the Assets view tab.
4. In the Assets list, create a new record and complete the necessary fields.

   Some fields in the Insert Content dialog box are described in the following table.

Field	Comments
Name	A name for the content asset record. Enter a name that is unique within in the content set.
Title	A descriptive title for the content asset.
Content (Asset) Type	Leave this field set to Auto-Detect (the default) to have the application determine the asset type, or select a type from the dialog box to set a specific type. For more information, see "About the Content Asset Types View" on page 202.
Filename or URL	Click the browse button, and then browse for a file or type a URL or network path to the content you want to copy into the Content Asset Management system. The Retrieve Graphics, Follow Links, Restrict to Subdirectory, and Max Depth controls apply only a URL or network path. For more information about these controls, see "Retrieve Graphics" on page 233. If you specify a shared network directory in the URL field, there are restrictions. Graphics and links can only be downloaded from certain valid shared directories. For more information, see "About Configuring Content Center" on page 203.
Lock	Select this to lock the content asset, so that others cannot edit it.

Field	Comments
Comments	Typically used to note information about updates made to the content asset. These comments are associated with the version of the content asset.

Setting the Home Page for a Content Set

After adding content assets to the content set, you can specify one of these assets to be the home page. The home-page asset displays when the content set is previewed. Because links on the preview applet are active, if the content set contains a portal-style HTML page, this is the best page to choose as the home-page asset.

To set the home page for a content set

1. If necessary, navigate to the Content Sets view (Step 1 in the "To create a content set" procedure on page 191).
2. For the Content Set record, in the Home Page field use the Pick Home Page dialog box to select one of the content assets in the set.
3. Click the Preview view tab.

   For more information about previewing, see "To review and edit the properties of a content asset record" on page 196.

Viewing and Editing Content Asset Properties

The following procedure describes the fields in the Content Assets view and use of the Preview, Links, Referenced by, Versions, and Access Groups views.

To review and edit the properties of a content asset record

1. From the application-level menu, choose View > Site Map > Content Center Administration > Content Sets, and select the content set that contains the content asset.
2. Click the Assets view tab.
3. Drill down on the content asset name.

   NOTE: You can also navigate to a particular content asset record by querying in the Content Assets view or by clicking on the asset-name hyperlinks on the Content Explorer.

   ---

4. Click Edit.

5 Fill in or edit the fields in the Asset Detail form as required.

Some fields are described in the following table.

Field	Comments
Name	A name for the content asset record. The name should be unique within in the content set.
Title	A descriptive title for the content asset.
Activation Expiry	Sets activation and expiration dates for the content asset. There is no logic associated with this date in the Content Center module, but when this content is used by other modules, such as Microsite Management, these dates are used to determine whether the content is displayed.
Content (Asset) Type	This field is set when the content asset is created and cannot be modified.
Language Code	Sets the language code for the content asset.
Private	If a content asset is private, only users on the associated access groups can view the asset. If this box is not selected, the asset is public and any user can view the asset, regardless of any access groups specified for the asset.

CAUTION: The Reset button sets all the fields in the record to null.

6 Click the Preview view tab to preview the content asset.

If the content asset is an HTML file or an image, the asset displays directly in the Preview applet. For other types of content assets, the title of the asset appears as a hyperlink, from which you can open the asset in the application that you choose.

7 Click the Links view tab to review the links within a content asset.

These may be links to graphics, to HTML pages, or to email addresses. They may be external links or they may be links to other assets within the content asset repository (internal).

If the link is internal, Content Center checks whether the link is valid.

8 Click the Referenced by view tab to review the other content assets that contain links to this content asset.

9 Click the Versions view tab to view information about the versions of the asset stored in the content asset repository.

- To roll back to a previous version, select it and click Restore.
- To download a version to file, select it and click Save to File.

10 Click the Access Groups view tab to view who has read and write access to the content asset:

- **Read access.** If the Private field is set, only those groups listed have read access. If the Private field is not set, there are no restrictions on who has read access to the asset.
- **Write access.** If any access groups have the Allow to Edit field checked, only they have write access. If the Allow to Edit field is blank for all, there are no write restrictions on the asset.

For information about creating access groups, see *Security Guide for Siebel eBusiness Applications*.

CAUTION: If the Private check box is not selected, all users have read access to the content asset. For a description of the Private check box, see the table in Step 5 in the “To review and edit the properties of a content asset record” procedure on page 197.

Checking Content Assets In and Out

Checking out a content asset downloads the asset file and locks the asset so that others cannot make changes to it.

Checking in a content asset uploads a new version of the content asset and unlocks the asset.

To check out a content asset

1. Navigate to the Content Sets view (Step 1 and Step 2 in the "To review and edit the properties of a content asset record" procedure on page 196), and select an HTML content-asset record to edit.

   NOTE: You can also navigate to a particular content asset record by querying in the Content Assets view or by clicking on the asset-name hyperlinks on the Content Explorer.

   ---

2. Click Check Out.

   Your user ID appears in the Locked by field.

To check in a content asset

1. In the Content Sets view (or the Content Assets view), select the content asset.
2. Click Check In.
3. In the Check In Content dialog box:
   a. Click the browse button and select a file or URL that contains the content asset you are checking in. (For more information, see "Filename or URL" on page 193.)
   b. Click Unlock to allow others to modify this content asset after check in.
   c. Add comments describing how this version differs from the last.

About the Content Asset Commands on the Menu Button

Most users only need to use the Check Out and Check In buttons. However, other content asset commands are available on the menu button of the Asset Detail form in the Content Assets view:

- **Lock.** Locks the content asset by the current user.
- **Unlock.** Unlocks the content asset. For example, you can use this command if you check out an asset, but then decide that you do not want to make any changes to it.
- **Save to File.** Downloads the content asset to a file, but does not lock the asset.
- **Replace.** Adds a new version of the content asset. The Replace command is available only when the asset is locked.
- **Delete.** Deletes the content asset record and is equivalent to the Delete Record command. This soft delete keeps past versions of the asset in the content asset repository. Deleted assets can be accessed through the Contents Sets History view.

Editing HTML Content

You can edit content assets of type HTML directly within the Siebel application using the integrated HTML editor.

NOTE: To edit large or complex HTML files, you may prefer to use a third-party HTML or text editing application.

To edit HTML content using the integrated HTML editor

1. Navigate to the Content Sets view (Step 1 in the "To create a content set" procedure on page 191), and select an HTML content-asset record to edit.
2. Click Edit HTML.

   The content asset is automatically checked out, and the integrated HTML editor opens.
3. Click on the edit area, and make changes as required.

   For general information about the integrated HTML editor, see *Fundamentals*.
4. Click Save.

   The content asset is automatically checked in.

About the Content Asset Types View

The Content Asset Types view contains the file types, and associated DTR (document type rules) files, extensions, and MIME types, that are recognized by Content Asset Management.

Although you can add new content asset types if necessary, it is unlikely that you will need to. Many file types are provided with the preconfigured Siebel application.

CAUTION: It is recommended that you do not edit or delete records in this view and that you do not delete any DTR files from your Siebel installation.

About Configuring Content Center

Content assets can be added to the Content Center repository by specifying a filename on a shared directory or by specifying a URL (see "Filename or URL" on page 193). In both cases, files that are linked-to from the specified file or URL can be imported by selecting to Follow Links (see "Follow Links" on page 233).

When shared network files are imported to the Content Center repository in this way, the permissions for the directory access are those of the server process account. Because the server process account typically has more extensive privileges than the user, there is a security risk of users importing content from directories to which they do not have access.

To prevent this, importing from shared directories has been disabled except for those directories that are listed in the contentbase.ini file. It is recommended that you limit this list of allowed directories to a set that you can easily monitor and manage.

On the Windows platform, the contentbase.ini file can be found in *SIEBEL_ROOT*\siebsrvr\bin, and, on the UNIX platform, the file can be found in *SIEBEL_ROOT*/siebsrvr/lib. The default file looks like this:

```
[Global Settings]

ImportFileEnabled=1

ImportFilePath=SiebelContentShare
```

- **ImportFileEnabled.** If ImportFileEnabled = 1, file import is allowed from directories identified in the ImportFilePath parameter. If ImportFileEnabled = 0 import is allowed only from URLs (where the URL's server enforces security) and import from shared directories and followed links is disabled.
- **ImportFilePath.** The value of this parameter determines the directories from which the user can import files. This value is a string of subpath names, delimited by semicolons. The directory specified by the user for file import must contain one of the subpaths listed.

  For example, if the ImportFilePath parameter is set to `SiebelContentShare;EngShare;\\orion;sales\content`, users can import files from these directories:

```
\\myPC\SiebelContentShare

\\ServerA\EngShare\GroupWeb

\\orion\users\NewsBulletins
```

However, you cannot import files from these directories:

```
\\myPC\SiebelContentShareAll

\\ServerA\Mysales\content
```

NOTE: The network path is interpreted relative to the server machine, not the client machine. Therefore, local paths like C:\ refer to directories on the server machine. And, for example, if the server machine is running UNIX, then the UNC path syntax \\orion\users\ is not valid; instead, it might be /net/orion/users/.

If you use the default (out-of-the-box) contentbase.ini file, the administrator or individual users need to set up one or more shared directories named SiebelContentShare to contain those files (and those files that are referenced by the specified files) that they want to import as content assets.

Microsite Management 9

This chapter describes how to use Microsite Management to create Web pages and manage Web page content.

Many companies have multiple content managers whose responsibilities include adding and modifying data on Web pages. The layout and maintenance of data and hypertext links must be done as efficiently as possible, without requiring IT resources. The Microsite Management module is designed to simplify creation and maintenance of Web pages. Everything from site organization and creation of new pages through to editing text and graphics is carried out from the Microsite Management screen.

Both structured and unstructured *page items* can be included on pages created within the microsite management module:

- **Unstructured Content.** Such as HTML files, graphics, and links to documents. Unstructured content can be authored in a variety of environments, including Microsoft FrontPage, PowerPoint, and Word and the integrated HTML editor within the Siebel applications. Placement of structured content on pages is carried out using Page Designer in the Microsite Manager screen.

- **Structured Content.** Such as product catalogs and lists of opportunities. In general, structured content is authored in the Siebel application environment. Placement of structured content on pages is carried out in Siebel Tools, by editing applets on views.

Key features of Microsite Management are:

- **Page Designer.** A graphical drag-and-drop page layout tool that allows page designers and content managers to quickly create areas for different types of content anywhere on a page.

- **Page Administrator Explorer Tree.** Gives a hierarchically organized view of all the pages in your Web site.

- **Preview.** Allows you to preview pages according to content status (for example, approved or draft) and according to release and expiration dates.
- **Access Control.** Is set at both the page and page item level so you can control which access groups can see and edit content.
- **Transparent Integration with Content Center.** Set up and route the tasks of creating, editing, and approving with Siebel Content Center. When a link to a file is added to a page, that file is added to the Siebel content repository as a content asset, and can be version-controlled with Content Center. For more information, see Chapter 8, “Content Center.”

Figure 7 and Figure 8 show the relationship between a finished page and Microsite Management's Page Designer layout tool that was used to create the page. The content on the page is indicated by page item icons in Page Designer. The areas of the page, such as the navigation bar, are indicated schematically in Page Designer.

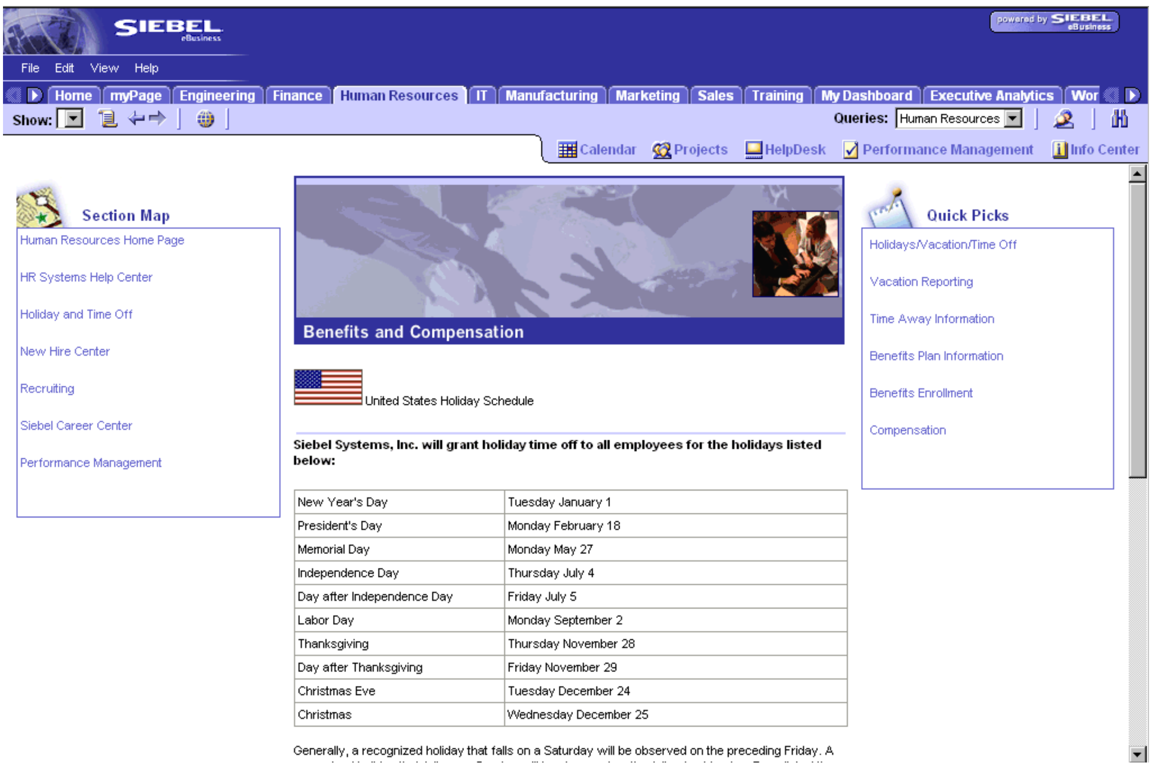


Figure 7. Microsite Page

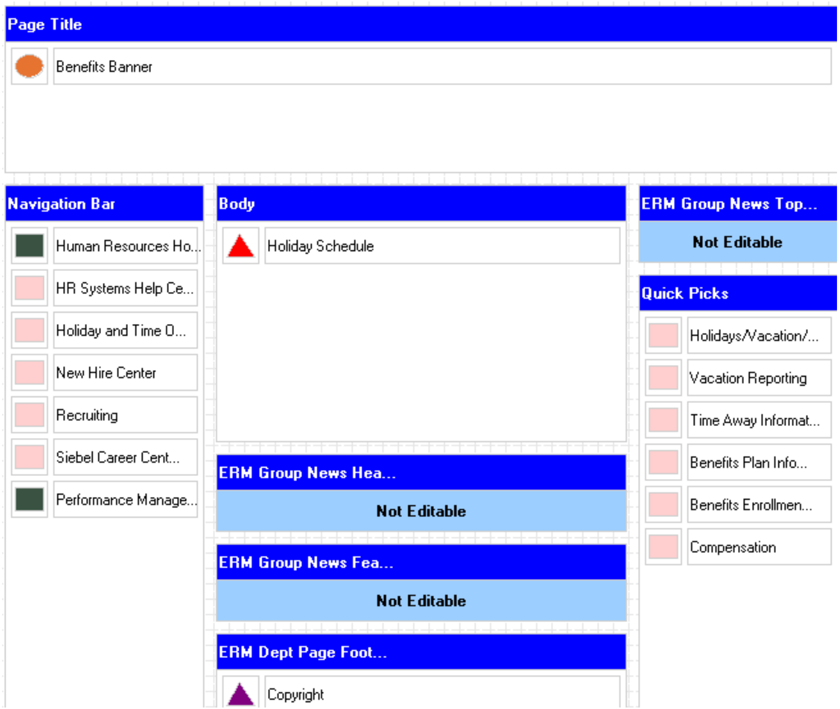


Figure 8. The Page Layout Schematic of the Microsite Page in Page Designer

Business Scenario for Microsite Management

This scenario provides an example of microsite management tasks performed by the microsite owner and a content author for the microsite. Your company may follow a different process according to its business requirements.

The microsite owner for the analyst relations group of a large company has been asked to develop a new microsite on the company intranet. The old Analyst Relations microsite contains out-of-date information and is hard to maintain. Using Microsite Management will make setting up the site and maintaining content much easier. The new site will include links to analysts' reports, lists of key contacts, information on the company's policies, and reports on competitors.

In cooperation with the company intranet administrator, the microsite owner reviews the existing structure of the company's Web site. Together they determine that the new Analyst Relations microsite should be available from the Sales root-level page. After the company intranet administrator has created the Sales root-level page, the microsite owner creates the new Analyst Relations page link on the Sales screen.

The microsite owner creates links to other intranet and Internet pages and to views within the Siebel application. He adds some text and graphics along with content created in applications such as Microsoft Word, Microsoft Excel, HMTL, and Adobe Acrobat.

The microsite owner associates the access groups to each of the page items. He makes sure that only certain groups of end users will see the items displayed on the page and also that the right contributors are able to edit the items' content.

Date ranges are also associated with each of the page items, so that only current content appears on the page. Because a number of content items require the same access groups and dates, the microsite owner uses the group properties feature, which allows him to set the same properties for all selected items together.

At various stages in the page design, the microsite owner previews the page. Because some of the content is time sensitive, he previews the page as it will appear on several dates in the future.

In order that users can use the Siebel Search Center to find the page, the microsite owner creates search indexes on the content.

As soon as the new Analyst Relations microsite page has been approved and is displayed to users, the microsite owner deletes the old page.

About Using Content Center with Microsite Management. Depending upon the complexity of the analyst relations microsite and the approvers (and authors) involved, the company may choose to use Content Center to streamline the production of this microsite, as outlined here:

- The corporate marketing director in charge of analyst relations creates a content project which her team uses to create the analyst relations microsite; in the project she specifies the tasks involved in producing the microsite.
- The Content Center workflow routes these tasks to the designated microsite owner who views them in his Content Inbox.
- The microsite owner drills down on the content task and creates the new analyst relations microsite.
- After content has been drafted, the microsite owner submits them for approval to the designated reviewers in the project's approval workflow.
- When the microsite and its contents have been approved, the microsite is published from the Content Center's staging environment to the production environment.

Example Process Flow for Microsite Management

This is an example of a simple process flow for Microsite Management. Your company may follow a different process flow according to its business requirements.

Figure 9 illustrates the process flow for the "Business Scenario for Microsite Management" on page 209.

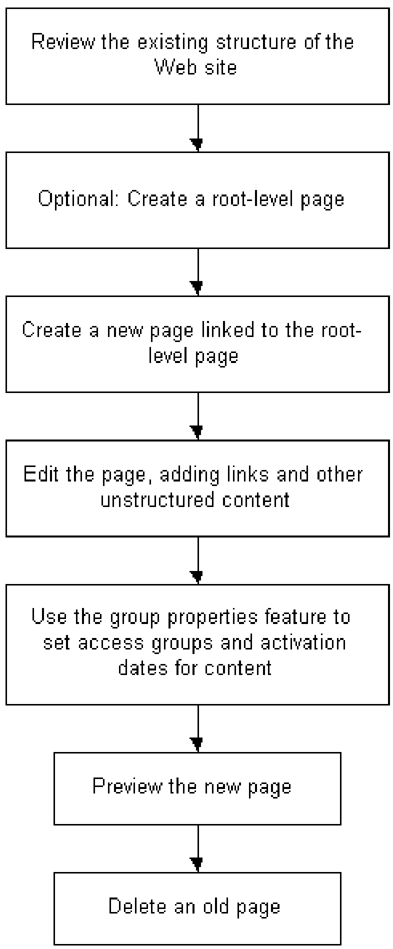


Figure 9. Example Process Flow for Microsite Management

Viewing and Editing Page Information

The Page Administration view includes:

- The Page Administration Explorer tree
- A list of pages, displaying those pages at the level selected on the tree
- A form applet displaying fields associated with the page selected in the page list

The *root-level* pages are the top level of the page hierarchy. All other pages are children of a root-level page or another page.

This structure helps you organize the pages. However, there are no requirements for, or restrictions on, hypertext links between child and parent pages.

The position of a page in the hierarchy is determined by the Parent Page field and the Order field.

Figure 10 shows the Page Administration Explorer tree and the Page list of the Page Administration view.

Figure 10. Page Administration Explorer Tree and Page List Applets

To find a page in the tree and modify its properties

1. From the application-level menu, choose View > Site Map > Microsite Management (or Administration) > Page Administration.
2. Use the Page Administration Explorer tree to find and select the page whose properties you want to modify.
3. In the form, edit fields as required.

   Some fields are described in the following table.

Field	Description
Page Title	A title for the page, up to 90 characters long. This title is used to identify the record but does not appear on the microsite.
Parent Page	The parent page determines where the page is nested in the page hierarchy.
Access Groups	Use this field to restrict read and read-write (select Editor field) access to this page. If this field is blank, there are no restrictions on who can view and edit this page, provided they have the view responsibilities for the template view and the Page Designer view. If no editor is specified, all the access groups can edit this page. If you do not have access to this page, the Page Title hyperlink is unavailable in the Page list.
View	Determines the Siebel view that the page is based on. For information about how to create new views, see *Siebel Tools Reference*.
Order	Determines the sequence of the page in its level of the Page Administration Explorer tree.
Description	Typically used to describe the page.
Comments	Typically used to enter comments about changes made to the page.

Creating a Root-Level Page

The root-level pages are those pages that appear at the top of the Page Administration Explorer tree. Typically only a few employees should have the responsibilities required to access the Portal Screen Administration view where root-level pages can be created.

In general, you will want to have a screen tab for each of the root-level pages. You can use Siebel Tools to create a screen tab for a new root-level page. For information, see the page tabs topic in *Siebel Tools Reference*.

Best practice is to standardize on a limited number of these pages in order to keep the top root-level of the explorer tree uncluttered and to restrict the number of screen tabs in the application.

To create a root-level page

1. From the application-level menu, choose View > Site Map > Microsite Management (or Administration) > Portal Screen Administration.
2. In the Portal Screen list, add a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Description
Screen	Name for the root-level page.
Default View Name	Determines the Siebel view that the page is based on. For information about how to create new views, see *Siebel Tools Reference*. The view that determines the Web template used by this page.
Access Groups	Use this field to restrict read and read-write (select Editor field) access to this page. If this field is blank there are no restrictions on who can view and edit this page, provided they have the view responsibilities for the template view and the Page Designer view. If no editor is specified, all the access groups can edit this page.

Field	Description
Order	Determines the sequence of the page at the top level of the Page Administration Explorer tree.
Inactive	If the root-level page is inactive: ■ The root-level page and its child pages do not appear in the Page Administration view ■ The page is not displayed in the application

About Page Designer

The Page Designer view is the center of the Microsite Management module. The Page Designer applet contains a graphical drag-and-drop page layout and tools for adding unstructured content, such as text, graphics, links to Siebel views, and links to other pages, to the designated sections of your page.

In the Page Designer UI, applets that contain structured content (such as an Activities, Opportunities, or Calendar applet on an employee's page) are indicated by the words "Not Editable."

The Create New Page Tool

New pages are created in the Page Designer view. This is the only way to create new pages within Microsite Management. To use the Create New Page tool, you must begin by choosing a parent page where you want to create link to the new page. This places the page appropriately in the page hierarchy and makes sure that you cannot create an *orphan* page (a page that is not accessible from any other page).

When you create a new child page, it is likely that you want the child page to look much like the parent page. For example, you might want to keep the same copyright information in the footer and the same list of links in the navigation bar. When you create the new page, you can select what content you want to copy from the parent to the child page.

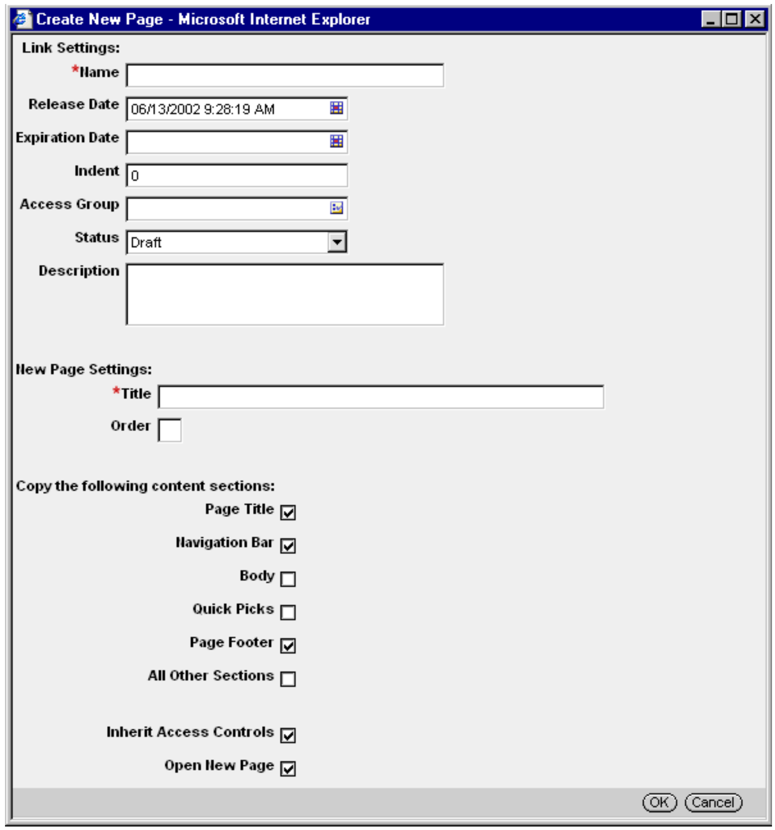
Similarly, it is likely that you want the child page to inherit the same access controls as the parent. When you create the new page, you can choose to copy access groups from the parent.

To create a new page

1. From the application-level menu, choose View > Site Map > Microsite Management (or Administration) > Page Administration.
2. In the Page list, select the page that will contain a link to the new page, and click the Page Title hyperlink.

   The Page Designer view appears.
3. From the Page Designer toolbar, drag the Create New Page tool to the position on the layout where you would like the new page link to appear.

4 In the Create New Page dialog box, complete the fields.



Some fields are described in the following table.

Field	**Description**
Name	This is the text that appears as the navigation link to the new page.
Release Date	Specifies the date when the link becomes active. The link appears when the date is between the release date and the expiration date and the status is Approved.

Field	Description
Expiration Date	Specifies the date when the link will no longer be active.
Indent	Determines the indentation, in number of spaces to the right, of the navigation link on the page.
Access Group	Use this field to restrict read and read-write (select Editor field) access to the navigation link. If this field is blank there are no restrictions on who can view and edit this navigation link. If no editor is specified, all the access groups can edit this navigation link.
Status	The status of the link: Approved, Designed, Draft, Final, Printed, Shipped, or Submitted. The Approved and Draft status fields determine what content is displayed in the page preview. See "Previewing a Page" on page 239.
Description	Contains additional information about the navigation link to the new page.
Title	A title for the page, up to 90 characters long. This title is used to identify the record but does not appear on the microsite.
Order	Determines the sequence of the page in its level of the Page Administration Explorer tree.
■ Page Title ■ Navigation Bar ■ Body ■ Quick Picks ■ Page Footer	A check mark in these boxes indicates the content in the sections of the current page which are copied into the new page. Sections must exist on the selected page if they are to be copied to the new page.
■ All Other Sections	If you have used Siebel Tools to configure views with new applet types that contain unstructured content, then checking All Other Sections will copy content from those sections to the new page.

Field	Description
Inherit Access Controls	If selected, Access Group values for the new page and any page items copied are inherited from the current (parent) page. If not selected, there are no access restrictions on who can view and edit the new page.
Open New Page	If selected, the new page opens in the Page Designer UI when the link is saved. If not selected, the Page Designer UI continues to display the current (parent) page after the link is saved.

5 Click OK.

NOTE: By default, the Parent Page and View are the same as those in the linked-from page chosen in Step 2 on page 216. These fields as well as the Description field can be edited in the Page Administration view; see "Viewing and Editing Page Information" on page 212.

The Link Existing Page Tool

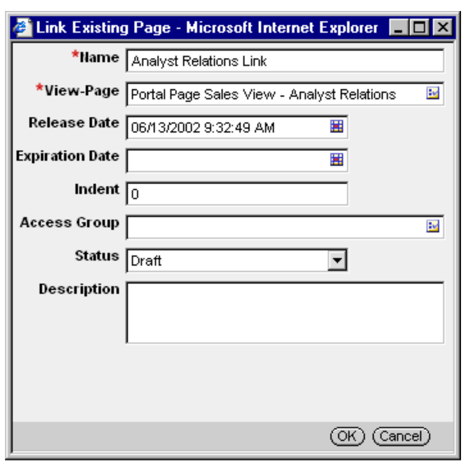
Using the Link Existing Page tool, you can create navigation links to other pages *within* the Microsite Management system.

If you want to create navigation links to external pages, see "The Add Web Link Tool" on page 224.

To create a navigation link between Microsite Management pages

1. From the application-level menu, choose View > Site Map > Microsite Management (or Administration) > Page Administration.
2. In the Page list, select the page on which you want to create the navigation link, and click the Page Title hyperlink.

   The Page Designer view appears.
3. From the Page Designer toolbar, drag the Link Existing Page tool to the position on the layout where you would like the new page navigation link to appear.
4. In the Link Existing Page dialog box, complete the fields.



Some fields are described in the following table.

Field	Description
Name	This is the text that appears as the navigation link to the new page.
View-Page	Select the target page for the navigation link. You can select any page in the application from the Pick Parent Page dialog box.
Release Date	Specifies the date when the navigation link becomes active. The link appears when the date is between the release date and the expiration date and the status is Approved.
Expiration Date	Specifies the date when the navigation link will no longer be active.
Indent	Determines the indentation, in number of spaces to the right, of the navigation link on the page.
Access Group	Use this field to restrict read and read-write (select Editor field) access to this page. If this field is blank there are no restrictions on who can view and edit this page, provided they have the view responsibilities for the template view and the Page Designer view. If no editor is specified, all the access groups can edit this page item.
Status	The status of the link, for example Approved, Designed, Draft, Final, Printed, Shipped, or Submitted. The Approved and Draft status fields determine what content is displayed in the page preview. See "Previewing a Page" on page 239.
Description	Contains additional descriptive information about the navigation link.

5 Click OK.

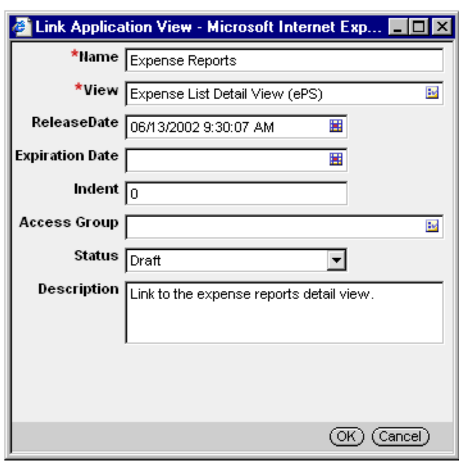
The Link App View Tool

Using the Link App View tool, you can add links from a page to a particular view in the Siebel application.

For example, you might want to add a link from your sales representatives' home page to the My Expense Reports view on the Expense Reports screen.

To create a link from a page to a view in the Siebel application

1. In the Page Designer view, select the page to which you want to add a link to a view in the Siebel application. (See Step 1 and Step 2 in the "To create a navigation link between Microsite Management pages" procedure on page 220.)
2. From the Page Designer toolbar, drag the Link App View tool to the position on the layout where you would like the application link to appear.
3. In the Link Application View dialog box, complete the fields.



Some of the fields are described in the following table.

Field	Description
Name	This is the text that appears as the navigation link to the new page.
View	From the Pick View dialog box, choose the application view that you want to display when the link is clicked.
Release Date	Specifies the date when the navigation link becomes active. The link appears when the date is between the release date and the expiration date and the status is Approved.
Expiration Date	Specifies the date the link will no longer be active.
Indent	Determines the indentation, in number of spaces to the right, of the navigation link on the page.
Access Group	Use this field to restrict read and read-write (select Editor field) access to this page item. If this field is blank there are no restrictions on who can view and edit this page item. If no editor is specified, all the access groups can edit this page item.
Status	The status of the link: Approved, Designed, Draft, Final, Printed, Shipped, or Submitted. The Approved and Draft status fields determine what content is displayed in the page preview. See “Previewing a Page” on page 239.

The Add Web Link Tool

Using the Add Web Link tool, you can link to external pages, identified by a URL. For example, on your microsite, you might want to provide links to your partners' Web sites.

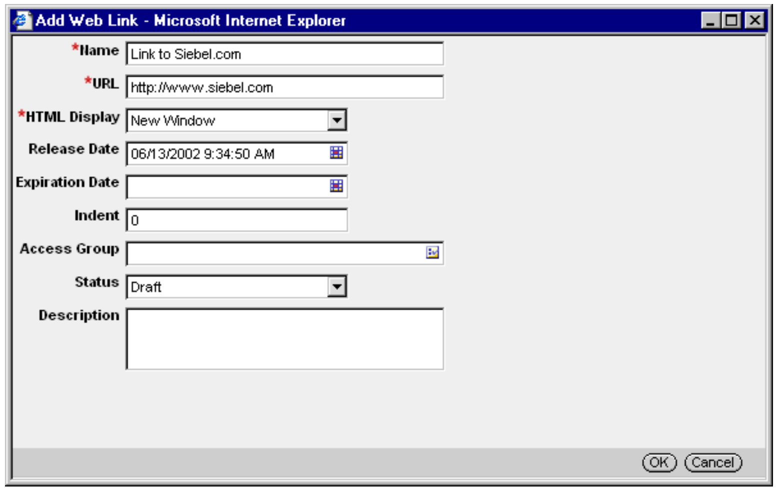
There are a number of ways that the external page can be displayed from the Microsite Management page:

- **Frame.** Within the frame of the current page.
- **In-Line.** Directly in the applet on the current page. Displaying pages in-line works best with simple pages. Large or complex pages, such as those that use JavaScript, can slow down the system and cause unexpected results. Be sure to test in-line pages.
- **New Window.** Launching a new browser window when the link is clicked; this allows the user to switch between the two pages.
- **Window.** Displaying the external page in the current browser window.

To create a link from a page to an external page

1. In the Page Designer view, select the page on which you want to add a link to an external page. (See Step 1 and Step 2 in the "To create a navigation link between Microsite Management pages" procedure on page 220.)
2. From the Page Designer toolbar, drag the Add Web Link tool to the position on the layout where you would like the external link to appear.

3 In the Add Web Link dialog box, complete the fields.



Some fields are described in the following table.

Field	Description
Name	This is the text that appears as the navigation link to the new page.
URL	Enter the exact URL of the destination for the link.
HTML Display	Choose how the external page is displayed: Frame, In-Line, current Window, or New Window.
Release Date	Specifies the date when the link becomes active. The link appears when the date is between the release date and the expiration date and the status is Approved.
Expiration Date	Specifies the date when the link will no longer be active.
Indent	Determines the indentation, in number of spaces to the right, of the navigation link on the page.

Field	Description
Access Group	Use this field to restrict read and read-write (select Editor field) access to this page item. If this field is blank there are no restrictions on who can view and edit this page item. If no editor is specified, all the access groups can edit this page item.
Status	The status of the link: Approved, Designed, Draft, Final, Printed, Shipped, or Submitted. The Approved and Draft status fields determine what content is displayed in the page preview. See "Previewing a Page" on page 239.
Description	Contains additional descriptive information about the navigation link.

4 Click OK.

The Create Content Tool

Using the Create Content tool, you can add rich-text content directly to the page through the integrated HTML editor.

Typically, you would use the Create Content Tool for adding short or simple content, such as captions or labels.

NOTE: To add complex HTML or large amounts of text, you may prefer to use a third-party HTML or text editing application to create an HTML file, and then place the file's contents on the page using the Insert File tool. See "The Insert File Tool and the Insert Image Tool" on page 231.

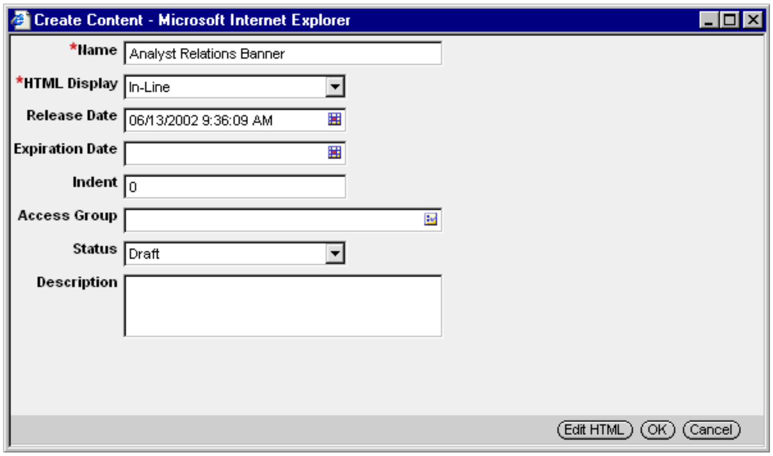
The formatted text entered and saved in the editor is saved as a content asset in the Content Asset Management's repository. For more information about the content assets, see "About Content Assets" on page 190.

For general information about the integrated HTML editor, see *Fundamentals*.

To add HTML directly to a page

1. In the Page Designer view, select the page to which you want to add HTML. (See Step 1 and Step 2 in the "To create a navigation link between Microsite Management pages" procedure on page 220.)
2. From the Page Designer toolbar, drag the Create Content tool to the position on the layout where you want the new content type to appear.
3. In the Create Content dialog box, click Edit HTML.
4. In the editor, type and format text, and add links and graphics.
5. Click Save to save the HTML to the content asset repository and close the HTML Editor.

6 Complete the fields in the Create Content dialog box.



Some of the fields are described in the table in Step 3 in the "To create a link from a page to an external page" procedure on page 225.

7 Click OK.

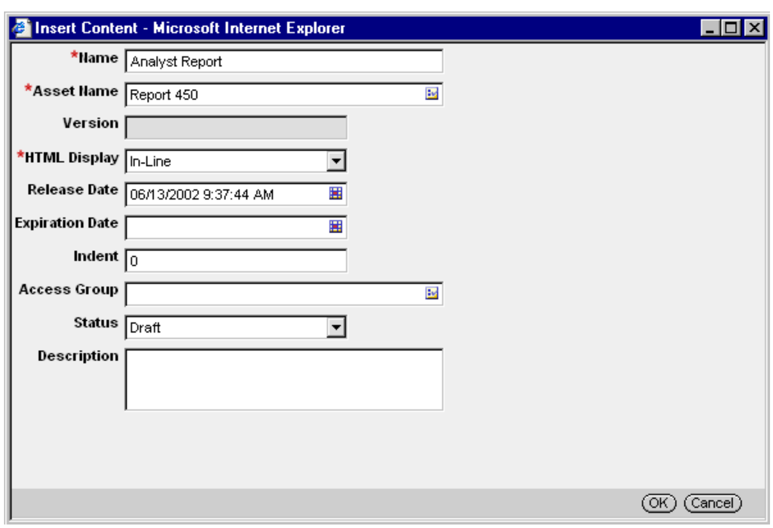
The Insert Content Tool

Using the Insert Content tool, you can add to your page content assets that stored in the content asset repository. For more information about the content assets, see "About Content Assets" on page 190.

For example, there may be a content asset that is a GIF image of your corporate logo, which you want to use to brand your page. Or, it may contain an Adobe Acrobat file, describing departmental policies, that you want to link to your page.

To add content assets to a page

1. In the Page Designer view, select the page to which you want to insert a content asset. (See Step 1 and Step 2 in the "To create a navigation link between Microsite Management pages" procedure on page 220.)
2. From the Page Designer toolbar, drag the Insert Content tool to the position on the layout where you want to add the content asset.
3. In the Insert Content dialog box, click the select button in the Asset Name field and use the Pick Content dialog box to select the content asset you want to add.



4 Complete the fields in the Insert Content dialog box.

Some of the fields are described in the table in Step 3 in the “To create a link from a page to an external page” procedure on page 225.

5 Click OK.

The Insert File Tool and the Insert Image Tool

Using these tools, you can insert files (such as HTML files, MS Word files, and Adobe Acrobat) and graphics files from your local file system, from shared networks and from the Web.

The difference between using the Insert File tool and the Insert Image tool is that the HTML display for the Insert Image tool is always set to In-Line.

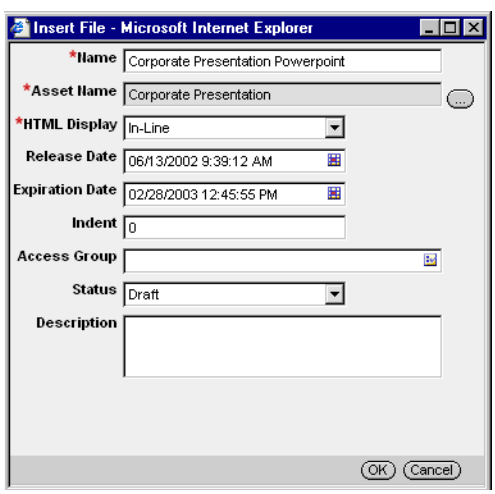
When these files are added to your page, they are also stored as content assets in the content asset repository. For more information about the content assets, see "About Content Assets" on page 190.

To add a file or graphic to a page

1 In the Page Designer view, select the page to which you want to add an image. (See Step 1 and Step 2 in the "To create a navigation link between Microsite Management pages" procedure on page 220.)

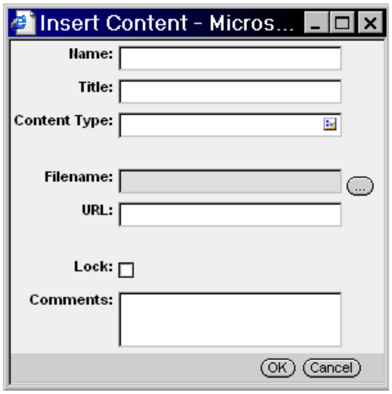
2 From the Page Designer toolbar, drag the Insert File (or the Insert Image) tool to a position on the layout.

The Insert File (or the Insert Graphic) dialog box appears.



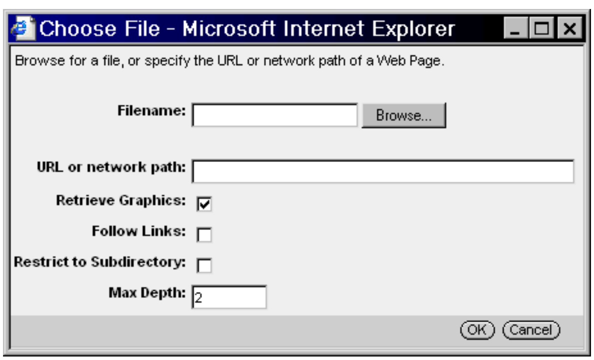
3 Click the browse button next to the Asset Name field.

The Insert Content dialog box appears.



4 Click the browse button next to the Filename field.

The Choose File dialog box appears.



5 In the Choose File dialog box:

- To select a file from a local directory, click Browse.

- To select a file on a shared directory or a URL, enter the path name in the URL or network path field, and complete the fields below. (See "About Configuring Content Center" on page 203 for information about listing shared directory names in the contentbase.ini file.)

  Some fields are described in the following table.

Field	Description
Retrieve Graphics	Determines if graphics on the specified Web page are copied along with the text.
Follow Links	Determines if the pages that are linked-to from the specified Web page are copied, and in turn links to those pages are copied.
Restrict to Subdirectory	Indicates that, if links are followed, only links to pages within the same directory as the specified page are copied.
Max Depth	Indicates the level to which links are copied. For example, if Max Depth = 1, pages that are linked-to from the specified page are copied, but not pages that they link to.

6 In the Insert Content dialog box, complete the fields.

Some of the fields are described in the following table.

Field	Description
Name	A name for the content asset record.
Title	A descriptive title for the content asset.
Content (Asset) Type	Leave this field set to Auto-Detect (the default) to have the application determine the asset type, or select a type from the dialog box to set a specific type.
Lock	Select this to mark the content asset locked by you.

7 In the Insert File or Insert Image dialog box, complete the fields.

Some of the fields are described in the table in Step 3 in the "To create a link from a page to an external page" procedure on page 225.

Editing Page Item Properties

The sections above explained how use the Page Designer UI to create new page items, for example, links to pages and graphics.

To edit page item properties, you select a page item on the Page Designer UI and modify its properties in the Page Item Properties form. The fields and buttons that are available in the Page Item Properties view depend upon the type of page item selected.

Items of type HTML, Web Content, Graphics, and File are content assets and are stored in the content asset repository. Details about these content assets can be viewed in the Asset Detail view, and these content assets can also be checked out for editing.

Some items can be edited using the integrated HTML Editor, launched from the Edit HTML button on the Page Item Properties form.

To edit a page item

1. In the Page Designer view, select the page that you want to edit. (See Step 1 and Step 2 in the "To create a navigation link between Microsite Management pages" procedure on page 220.)
2. In the Page Designer UI, select the page item whose properties you want to edit.
3. In the Page Item Properties form, edit the fields.

   NOTE: Those fields and buttons that are not appropriate for the selected page item are unavailable.

4. Use the Check-Out and Check-In buttons to open and edit content. (For more information about checking out content assets, see Chapter 8, "Content Center.")

5. Click Asset Details to open the Content Assets view and to:

   a. See information about the selected item.

   b. Roll-back to a previous version of the content asset.

   c. Review the content asset for broken links.

   For more information about the Content Assets view, see Chapter 8, "Content Center."

6. To edit HTML content, click Edit HTML.

   For more information about the integrated HTML editor, see *Fundamentals*.

Deleting Page Items

Deleting items from a page is done through the Web Designer UI. Any item that has been saved in the content asset repository remains there even after the associated page item is deleted.

To delete a page item

1. In the Page Designer view, select the page from which you want to delete items. (See Step 1 and Step 2 in the "To create a navigation link between Microsite Management pages" procedure on page 220.)
2. In the Page Designer UI, select the page item and type CTRL + DEL.

Saving and Canceling Changes to the Page Layout

In the Page Designer view, page records are saved in the same way that other records are saved in the application. (See "To save a page record.")

Use the Cancel button to return page items to their last-saved positions, removing any just-created page items and adding back any just-deleted page items.

However, changes made to the page item properties (such as Status or Indent) are not lost when Cancel is clicked.

For example, if you move a link from the navigation bar to quick picks, change its status from Draft to Approved, and then click Cancel, the link returns to the navigation bar but its status remains Approved.

To save a page record

- In the Page Designer view do one of the following:
  - Click Save.
  - Click Preview.
  - Select another page.
  - Navigate to a different view.

To cancel changes to the page layout

- After making changes to the page layout in the Page Designer UI, click Cancel.

  The layout reverts to how it was when the record was last saved.

Managing Groups of Content Items

To make page management easier, content items can be grouped and common properties assigned to them. For instance, certain items may need to be grouped so that the release dates for all of the page items are identical.

To group page content items

1. In the Page Designer view, select the page you want to edit. (See Step 1 and Step 2 in the "To create a navigation link between Microsite Management pages" procedure on page 220.)
2. Select all of the content items you want to manage as a group.

   Hold the SHIFT key while clicking on the page items to select multiple items.
3. Click Group Properties.
4. Complete the fields as required in the Page Items Group dialog box.

   Only those properties that are common to all types of page items appear in this dialog box: Indent, Release Date, Expiration Date, Access Group, and Status.

Previewing a Page

After you have laid out the content on the Page Designer UI, you will want to preview the page.

Whether or not content appears on the displayed page depends upon the content item's release date, expiration date, and status.

The preview feature in Page Designer allows you to:

- Set a date for the preview (content inactive on that date does not appear).
- Choose to display only approved content, only draft content, both approved and draft content, or all content regardless of status.

To preview a page

1. In the Page Designer view, select the page you want to edit. (See Step 1 and Step 2 in the "To create a navigation link between Microsite Management pages" procedure on page 220.)
2. In the Page Designer UI:
   a. Enter a Preview Date.
   b. Choose a Preview Status (Approved; Approved and Draft; Draft; or All).
   c. Click Preview.

      The rendered page appears in preview mode.
3. Return to the Page Designer UI by clicking the back button on the Siebel application's toolbar.

Deleting a Page

Pages can be deleted from the Page Administration view. Root-level pages can also be deleted from the Portal Screen Administration view.

When a page is deleted:

- The status of any navigation links to that page (on other pages within Microsite Management) is changed to Draft. This prevents broken links from appearing on displayed pages.
- The Access Group field for any navigation links to the page are reset (no access restrictions).
- The target page (View-Page) for the link is set to NULL. When you edit a link where the View-Page is NULL, you must specify a valid View-Page before you can save changes to the link.

To delete a page

1. From the application-level menu, choose View > Site Map > Microsite Management (or Administration) > Page Administration.

   The hierarchical structure of screens and subordinate pages appears on the left, and the page list and detail form appear on the right. Click the + sign to expand a folder.

2. Select the page you want to delete, and delete the record.

About Creating Search Indexes

Content assets on microsite pages can be integrated with the Siebel Search Center. This allows users to find pages by searching for keywords. For information about creating indexes for Search Center, see *Siebel Search Administration Guide*.

About Configuring Microsite Management

The mmlayout.txt file is used by Page Designer to schematically represent the layout of the applets in the view (Figure 8 on page 208). The file contains layout information for all Siebel preconfigured views designed to contain unstructured content.

The mmlayout.txt file also contains a parameter used to turn page caching on and off.

On a Windows platform, the mmlayout.txt file can be found in *SIEBEL_ROOT*\siebsrvr\bin. On a UNIX platform, the file can be found in *SIEBEL_ROOT*/siebsrvr/lib.

Adding New View Layouts to the mmlayout.txt File

If you have created new views in your Siebel application, and you want to use these views as templates for microsite pages, you need to edit the mmlayout.txt file to schematically describe how the applets in your views are laid out.

NOTE: For information about creating views that can contain unstructured content, see *Siebel Tools Reference*.

Turning Microsite Page Caching Off

By default, page caching of microsite pages is turned on.

The advantage of page caching is that microsite pages are rendered faster.

The disadvantage of page caching is that if you make a change to a page using Page Designer, the change (although visible in preview mode) does not appear on the actual page until you log off and back in.

TIP: If you have both a staging and a production environment, consider using page caching in the production environment, but not in the staging environment.

To turn off microsite page caching

1. Open the mmlayout.txt file in a text editor.
2. Change the line

   ```
   <EnablePageCaching>TRUE</EnablePageCaching>
   ```

   to

   ```
   <EnablePageCaching>FALSE</EnablePageCaching>
   ```

   NOTE: Because page caching is the default, if you delete the line, page caching remains on.

   ---

3. Save and close the file.

Global Accounts 10

This chapter describes the administration tasks associated with Siebel Global Accounts.

Siebel Global Accounts is a module that provides sales professionals with global account-level visibility into the interactions that the company's sales organization and partner's sales organizations have had with the account. Users can view all accounts, opportunities, activities, contacts, and account team members across the account hierarchy on one screen, allowing sales professionals to build a deep understanding of target accounts.

For information about viewing Global Account information, see *Siebel Sales User Guide*.

Global Account hierarchies are not provided out-of-the-box with your Siebel eBusiness Application. They must be set up by an administrator. There are two kinds of account hierarchies that can be set up by the administrator:

- **Default.** This type of account hierarchy is based solely on the accounts' Parent fields. This account hierarchy is self-maintaining in that whenever the Parent field of any account is updated, the default hierarchy is also updated. Once set up, the default hierarchy is applied to all organizations that do not already have an organization.
- **Custom.** This type of hierarchy is created by the administrator, either by modifying the default hierarchy or from the beginning. Once set up, this hierarchy is independent of the accounts' Parent fields, and as such must be updated by the administrator when changes occur.

Business Scenario for Global Account Administration

This scenario provides an example of a process flow performed by the accounts administrator. Your company may follow a different process flow according to its business requirements.

A large company, Corp 123, wants to view consolidated data at the global account level. This company has two organizations set up in its Siebel application: a sales organization and a financial organization. The accounts administrator sets up two account hierarchies, one for each organization. These hierarchies allow end users to view the opportunities and contact information associated with parent accounts.

The sales organization uses the default hierarchy, which is based on the Parent account field. For various reasons, the financial organization requires a modified version of the account hierarchy. One of these reasons is that some accounts' billing structures are different from the accounts' purchasing structures. For example, in the case of XYZ Inc. there are four XYZ accounts who are customers of Corp 123: the XYZ Holding company, two regional subsidiaries, and a financial company. The 123 sales organization wants to view the account hierarchy where all accounts report to the parent holding company. Because all account billing for the XYZ companies is funneled through XYZ Financial, Corp 123's financial organization wants to view the account hierarchy where all accounts report to the XYZ Financial. Figure 11 shows the two hierarchies.

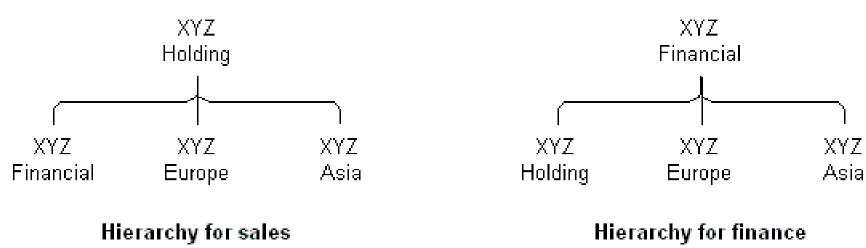


Figure 11. Examples of Account Hierarchies

The default hierarchy used by the sales organization updates automatically when new accounts are added or Parent fields are changed. However, the accounts' administrator updates the finance hierarchy on a weekly basis as new accounts are added and the structure of existing accounts changes.

Example Process Flow for Global Accounts Administration

Figure 12 illustrates the business scenario, "Business Scenario for Global Account Administration" on page 244.

These tasks should be carried out in the order presented.

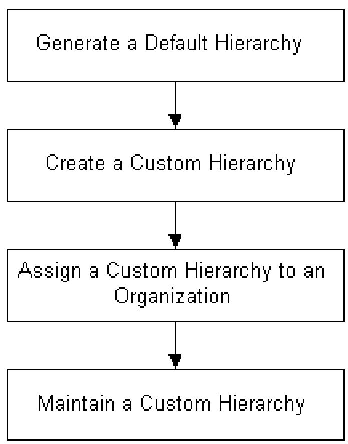


Figure 12. Example Process Flow for Global Account Administration

Generating a Default Hierarchy

Follow this procedure to set up a default hierarchy. Once generated, this default hierarchy is automatically assigned to organizations without an account hierarchy.

To change the account hierarchy assigned to an organization, see "Assigning a Custom Hierarchy to an Organization" on page 250.

To create a default hierarchy

1. From the application-level menu, choose View > Site Map > Data Administration > Global Accounts, or if you are using SIA (Siebel Industry Applications), choose View > Site Map > Applications Administration > Account Hierarchies.
2. In the Account Hierarchy list, click Generate Hierarchy.

   A new account hierarchy is created.

   Some fields are described in the following table.

Field	Comments
Name	A default name is generated based on your user ID and the date.
Default	Select so that the account hierarchy is the default. The default hierarchy is assigned to all organizations without an account hierarchy and is updated when new Parent fields on the account records are added or modified.

TIP: If the generated hierarchy does not appear in the Account Relationships lists, refresh the view by navigating to a different view and then returning to the Global Accounts view.

3 In the Account Relationships list, review the hierarchy records.

NOTE: If end users are using the application when you generate the account hierarchy, they must log out and log in again to see the default account hierarchy in the rollup views.

Creating a Custom Hierarchy

You can create a custom hierarchy by generating a hierarchy as described in the preceding section or by starting from the beginning and creating a series of new records in the Account Relationships list.

To create a custom hierarchy

1. From the application-level menu, choose View > Site Map > Data Administration > Global Accounts. (If you are using Siebel Industry Applications, choose View > Site Map > Applications Administration > Account Hierarchies.)
2. In the Account hierarchy list, create a new record and complete the fields. Do not check Default.
3. In the Accounts Relationship list:
   a. Create new records for each of the top level parent accounts. Leave the Parent Account field blank for each of these.
   b. Create new records for the child accounts, entering the Parent Account for each.

To create a custom hierarchy based on the default hierarchy

1. Create an account hierarchy as described in "To create a default hierarchy" on page 247.
2. Select the account hierarchy record and make sure that the Default field is not selected.
3. In the Account Relationships list, edit the Parent Account field for existing accounts and create new relationship records as required.

   Accounts without Parent Accounts are at the top of the hierarchy and must be entered before their child records can be completed.

Assigning a Custom Hierarchy to an Organization

An organization uses the default hierarchy unless a custom hierarchy has been assigned to it.

To assign a custom hierarchy to an organization

1. From the application-level menu, choose View > Site Map > Group Administration > Organizations.
2. Select the organization whose account hierarchy you want to change.
3. In the More Info form, in the Account hierarchy field, select the custom hierarchy that you want the organization to use when viewing global accounts.

Maintaining a Custom Hierarchy

Custom hierarchies are static and must be maintained by the administrator. There are two approaches to updating an account hierarchy:

- Edit the account relationships in the current hierarchy.
- Restore the hierarchy to the default (parent account) hierarchy, and then edit the account relationships in the hierarchy.

To maintain a custom hierarchy

1. From the application-level menu, choose View > Site Map > Data Administration > Global Accounts. (If you are using Siebel Industry Applications, choose View > Site Map > Applications Administration > Account Hierarchies.)
2. Select the account hierarchy record.
3. Do one of the following:
   - In the Account Relationships list, edit the Parent Account fields for existing accounts and create new relationship records as required.
   - In the Account Relationships list, click Restore Hierarchy to return the hierarchy to the default, and then edit the Parent Account fields for existing accounts and create new relationship records as required.

Activities, Activity Plans, and Assessments 11

This chapter contains information about activities, activity templates for activity plans, sales methods and stages, and assessment templates. The chapter focuses on administrative tasks.

For information about creating activity templates for field service activities, see *Siebel Field Service Guide*.

For information about end-user tasks, see *Siebel Call Center User Guide* and *Siebel Sales User Guide*.

About Activities

Siebel applications use activities to organize, track, and resolve a variety of tasks, from finding and pursuing opportunities to closing service requests. If a task requires multiple steps that one or more people may carry out, activities greatly simplify the job. Activities can help:

- Define and assign the task
- Provide information to complete the task
- Track the progress of the task
- Track costs and bill for the task

These are the major advantages of breaking down a task into one or more activities:

- The ownership of the problem can remain at the management level, when required.
- The employee looking at assigned activities can identify only the required information.
- Reporting is simplified.
- Activities can be assigned to more than one person.

Assignment Methods

Activities, once generated, are assigned to appropriate employees. Activity assignment can take place in a number of ways:

- Manual assignment
- Automatic assignment to the creator of the activity (by predefaulting the Owner field to the activity's creator)
- Automatic assignment using Assignment Manager (see *Siebel Assignment Manager Administration Guide*).

Business Objects Associated with Activities

Siebel activity objects may be associated with other Siebel business objects. Some common associations are listed in Table 19. In most cases, this association is with a set of activities defined by an activity plan and individual (or stand-alone) activities. In a few cases, an object is associated either with an activity template or with stand-alone activities.

Table 19. Association of Activity Object with Other Siebel Objects

Screen Name	Business Object	Stand-Alone Activities	Activities from Templates
Accounts	Account	Yes	Yes
Agreements	Service Agreement	Yes	Yes
Assets	Asset Management	Yes	No
Campaigns	Campaign	Yes	No
Contacts	Contact	Yes	Yes
Messages	Messaging	Yes	No
Opportunities	Opportunity	Yes	Yes
Orders (Order Line Items view)	Order Entry	Yes	Yes
Preventive Maintenance	FS PM Plan Item	No	Yes
Programs	Program (DBM)	No	Yes
Projects	Project	Yes	Yes
Quality	Product Defect	Yes	No
Repairs	FS Repair	Yes	Yes
References	Reference	Yes	No
Service	Service Request	Yes	Yes

About Activity Templates and Activity Plans

Activity templates are created by an administrator and are blueprints for sets of activities. Activity templates can be invoked by end users to create activity plans.

Activity plans are collections of activities that are created using the activity template. They are specific instances of activity templates that have been invoked by end users.

Each activity template is associated (through its Type value) with a certain business object. See Table 19 on page 255 for a list of business object and screens that use activity templates.

In Activity Plans views, only activity templates that have been associated with the active business object can be invoked. For example, on the Opportunity screen, only templates for opportunity activities are visible. Selecting a template creates all the activities defined by that template.

When the activity plan is created from the activity template, activities are created based on the activity template details defined in the activity template.

Typically, the administrator sets up the activity templates, and the end users apply the activity templates to create their activity plans.

About Assessment Templates

An assessment template is a model used to generate an assessment. Assessment templates can be created to assess opportunities, contacts, and accounts, as well as other areas of the Siebel applications, such as the Ideal Customer assessment used by the Strategic Selling® module.

Assessments ask questions (in the form of attributes) and score the answers in order to determine a single total score or percentage, which measures or ranks a given opportunity, contact, account, or so forth.

Assessments are made up of one or more attributes. Each attribute has a name, a weight, a set of allowable values and a description field. For example, a common attribute for an account might be Credit History. The values for this attribute might include Excellent, Good, Average, and Poor. Each of these values carries a numerical score and, optionally, instructions for the end user on how to choose the correct value.

Typically, the administrator creates assessment templates, and end users apply the templates and carry out the assessments.

About Sales Methods

A sales method is an approach used in the sales process. The administrator sets up sales methods and sales stages that represent the organization's desired sales process. A method may encompass every stage associated with the sales process, from prospecting to forecasting to closing deals. You can set up as many methods and sales stages as your organization needs. Sales representatives can then use the method most appropriate for their opportunities.

Sales methods can differ even within one organization. For instance, a sales method for dealing with complex multimillion dollar opportunities may include as many as fifteen stages, while a sales method of a low dollar opportunity may require only four.

Sales methods and stages are only associated with activity templates and assessment templates of type Opportunity.

Business Scenarios

This scenario provides an example of a process flows performed by the administrator and the end users in a sales situation. Your company may follow a different process flow according to its business requirements.

Business Scenario for Sales

A sales organization has adopted a new sales methodology in order to improve the effectiveness of its sales people. The business analyst has provided the administrator with a detailed document describing the sales method, the stages of the method, and the activities that each salesperson should perform at each stage of the deal. The outline of the document looks like this:

```
Our New Sales Method

   > Stage 1, Prospecting, the lead discovery phase. (Status = Open)

   > Stage 2, Qualification of the lead and working up the deal.
   (Status = Open)

   v  Stage 3, Closing the deal and entering the order. (Status =
   Won)

      > Activity 1, Prepare the quote within 2 days

      > Activity 2, Email the quote to manager for approval within 3
      days

      > Activity 3, Create the contract within 1 week

   > Stage 4, Lost deal. (Status = Lost)
```

The administrator creates a new sales method record (New Sales Method) and four associated sales stage records (Prospecting, Qualification, Closing, and Lost).

Next, she creates four new activity templates, one for each stage. The activity template describes the activities and milestones that the sales people should perform at that stage.

Because the sales people enter their own opportunities, the administrator sets up the activity template details so that the salesperson who enters the opportunity will be automatically assigned ownership of the activities.

By setting up lead times in the activity template details, the due dates for the activities will be calculated automatically from the date that the opportunity enters the sales stage.

Sometimes sales people have too many opportunities to deal with at once. To help them prioritize, the business analyst has created a standardized assessment document that he recommends all sales people use to rank their opportunities. The outline of assessment document looks like this:

```
Assessing a Lead at the Qualification Stage

   > Attribute 1: Adaptability to New Technology, weight = 5

   ∨ Attribute 2: Number of potential users, weight = 7

       0 to 50, score = 0, Too small

       51 to 100, score = 1, Route to telesales

       101 to 500, score = 2, Route to middle market

       more than 500, score = 6, Pursue aggressively

   ∨ Attribute 3: Sponsor's stance, weight = 10

       Adversarial, score = -5, Strongly against us

       Weak, score = 0, Neutral or slight favor another vendor

       Moderate, score = 5, Willing to recommend our product

       Strong, score = 10, Believes we are the best choice

   > Attribute 4: Lead's purchase profile and history, weight = 5
```

The administrator uses the information in this document to create an assessment template associated with the qualification stage. When a salesperson reaches the qualification stage of the deal, the Assessments view for that opportunity is automatically populated with the questions that need to be answered in order to assess and prioritize the opportunity.

Other Business Scenarios

Activities, activity templates, and assessment templates are used in many ways throughout Siebel applications. For examples of other scenarios, see:

- *Siebel Sales User Guide*
- *Siebel Call Center User Guide*
- *Siebel Field Service Guide*
- *Siebel Professional Services Automation User Guide*
- *Siebel Order Management Guide*

Example Process Flow for Activities Administration

Figure 13 illustrates the process flow for the business scenario ("Business Scenario for Sales" on page 259).

The tasks are typically, but not necessarily, carried out in the order presented.

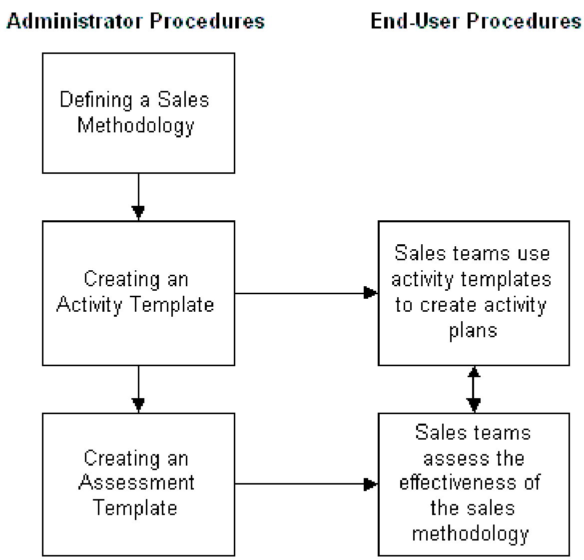


Figure 13. Example Process Flow for Sales Business Scenario

Defining a Sales Methodology

There are two parts to creating a sales methodology:

- Creating the sales method record
- Creating a sales stage record for each stage in the methodology

---

NOTE: Sales methods and stages are associated with activity templates and assessment templates of type Opportunity. If you are not intending to create a template of this type, you do not need to define a sales methodology.

You use the Sales Methods view of the Applications Administration screen to define sales methods and to create and associate sales stages with each of those methods.

To create a sales method and associated sales stages

1. From the application-level menu, choose View > Site Map > Application Administration > Sales Methods.
2. In the Sales Methods list, create a new record and complete the necessary fields.

3 In the Sales Stages list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Phase	This value is used for rolling up many different stages into phases. Select the one that best matches the stage you are currently adding. For example, a stage called Prospecting would best match the lead discovery phase. The choices in this drop-down list are configured by using the SALES_STAGE_PHASE_TYPE type in the List of Values. For more information, see Chapter 4, “Working with Lists of Values.” The default choices are: ■ A - Lead Discovery ■ B - Working the Deal ■ C - Closing ■ D - Lost Deal
Status	The choices in this drop-down list are configured by using the SALES_STAGE_STATUS type in the List of Values. For more information, see Chapter 4, “Working with Lists of Values.” The default choices are Open, Won, and Lost.
Quota Factor	The amount by which a sales representative’s quota will be multiplied by for that sales stage. As you move deals from one stage to another, some deals will fall out of the pipeline. In order to eventually close \$1,000,000 in revenues, you might need \$10,000,000 worth of stage 01 deals, or \$5,000,000 worth of stage 04 deals, or \$1,500,000 of stage 08 deals. This means your quota factors in this case will be 10 for stage 01, 5 for stage 04, and 1.5 for stage 08. In your Siebel application, a sales representative’s quota is the sum total of his or her revenue quota objectives on all of his or her active quota plans. The default value is 1.
Order	The sales stage’s position in the list of values in the Opportunities screen.

Field	Comments
Win Probability	The probability or likelihood (out of 100) that, after successfully completing this stage, the deal will eventually be won. In theory, the later the stage, the higher the win probability should be, because each stage brings the salesperson closer to winning the deal.
Duration	The number of days in a particular stage required for an average deal under average circumstances.
Stalled Deal Limit	The number of days that an opportunity can be in a particular sales stage. If the opportunity exceeds this limit, you can consider the deal to be stalled. There is no effect on the sales stage or any other aspect of the opportunity.

Before the Sales Method and Sales Stage can be used, the cache may need to be refreshed. For more information, see "Clearing the Cache" on page 104.

Creating an Activity Template

You use the Activity Templates view of the Applications Administration screen to create activity templates.

NOTE: For information about creating service activity templates using the Service Details view, see *Siebel Field Service Guide*.

To create an activity template without grandchild records

1. From the application-level menu, choose View > Site Map > Application Administration > Activity Templates.
2. In the Activity Templates list, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Sales Stage	If you are creating a template of type Opportunity, select the sales stage with which you would like to associate the activity template. When the sales stage is selected, the Sales Method field is automatically filled in. When this sales stage (and sales method) are specified for an opportunity, the activity template is used to automatically populate the Activity Plan and Activity lists for that opportunity. For information about creating sales stages and methods, see "Defining a Sales Methodology" on page 263.
Type	Select the type that specifies where you would like the template to be available. For example, select Account if you want to use this template to create activity plans for accounts, or Milestone for TAS customer milestones. The choices in this drop-down list are configured by using the TEMPLATE_OBJECT_TYPE type in the List of Values. For more information, see Chapter 4, "Working with Lists of Values."

Field	Comments
Sales Method	When the sales stage is selected, the Sales Method field is automatically filled in.
Public	There is no logic associated with this field. You may choose to use it in conjunction with workflows and search specifications.

3 Click the Activity Template Details view tab.

4 In the Activity Templates Details list, create a new record, and complete the fields.

Some fields are described in the following table.

Field	Comments
Type	The choices in this drop-down list are configured by using the TODO_TYPE type in the List of Values. For more information, see Chapter 4, “Working with Lists of Values.”
Duration	The time in minutes needed to complete the activity.
Lead	The lead time for the activity.
Units	Units of time to measure the lead time of the activity.
Employees	User names of the people who are to perform the activity. See “About Activity Assignment” on page 270.
Breakable	This is an input parameter to Siebel Scheduler. For more information, see *Siebel Field Service Guide*.
Lock Schedule	This field is used for service activity templates. For more information, see *Siebel Field Service Guide*.
Work Time	This field is used for service activity templates. For more information, see *Siebel Field Service Guide*.
Alarm	Whether an alarm should go off when it is time for the activity.
Category	See “About Activity Assignment” on page 270.
Lock Assignment	Whether the Employees field should be locked. If it is unlocked, the Assignment Manager can reassign it.

Field	Comments
Required	This check box indicates that the activity must be completed. This is for information only; there is no associated code.
Display In	Choose to display the activity in the Calendar screen, the Activity screen, or in both. This field is not displayed by default.

5 Create a new activity template detail record for each activity associated with the activity template.

Deleting an Activity Template

CAUTION: If you delete an activity template, *all* activities associated with activity plans that reference the template are also deleted.

To delete an activity template

1. From the application-level menu, choose View > Site Map > Application Administration > Activity Templates.
2. In the Activity Templates list, select and delete the activity template record.

About Activity Assignment

Activities created using activity templates can be assigned automatically to:

- The employee who is specified in the template
- The employee who creates the activity, using activity templates (this is usual in a sales situation)
- No employee (this is recommended when Assignment Manager will be used to assign the activity)

The assignment is determined by the values in the Employee and Category fields of the activity record in the Activity Template Details list, according to Table 20.

Table 20. Employee and Category Values Determine Activity Assignment

If Employee Is...	and Category Is...	Then the Activity Is...
NOT NULL	*any value* (NULL or NOT NULL)	assigned to the employee who is specified in the Employee field of the template.
NULL	Field Engineer Activity Repair Activity, Preventive Maintenance, or Other	not assigned. The Employee and Owner fields are blank in the created activity.
NULL	*not* Field Engineer Activity, Repair Activity, Preventative Maintenance, or Other	assigned to the employee who creates the activity (by applying the activity template).

NOTE: Activities created directly in the Activities screen are similarly affected by the Category value. If the Category value is changed to Field Engineer Activity, Repair Activity, Preventive Maintenance, or Other, the values of Owner and Category fields will be deleted and set to NULL when the record is saved.

Creating an Assessment Template

You use the Sales Assessment Templates view of the Applications Administration screen to create assessment templates.

To create an assessment template

1. From the application-level menu, choose View > Site Map > Application Administration > Sales Assessment Templates.
2. In the Assessment Templates list, add a record, and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Assessment	The name of the template.
Type	Select the type that specifies where you would like the template to be available. For example, select Contact if you want to use this template to create an assessment plan for contacts. The choices in this drop-down list are configured by using the TEMPLATE_OBJECT_TYPE type in the List of Values. For more information, see Chapter 4, “Working with Lists of Values.”
Sales Stages	If you are creating a template of type Opportunity, select sales stages with which you would like to associate the assessment template. When one of these sales stages (and matching sales method) is specified for an opportunity, the assessment template is used to automatically populate the Assessments view for that opportunity.
Sales Method	This field is filled when a sales stage is selected.

3 In the Assessment Attributes list, add a record for each attribute you want to assess.

Some fields are described in the following table.

Field	Comments
Order	The attribute's position in the Assessment Attributes list.
Name	Name of the attribute.
Weight	The relative importance of the attribute.
Max Child	This field contains the maximum score from the Attribute Values list.
Weight Times Score	This is the product of the Weight and the Max Child values.

4 For each assessment attribute, create a record for each possible value of the attribute.

Some fields are described in the following table.

Field	Comments
Order	Indicates the value's position in the Attribute Values list.
Value	The name of the value, for example, Excellent, Good, or Average.
Score	The number of points that the value represents.
Description	Additional information about the value to help the assessor.

These values will appear in the Pick Attribute Value dialog box when the end user applies the template. For information about using an assessment template, see *Siebel Sales User Guide* or *Siebel Call Center User Guide*.

How Assessment Scores Are Calculated

The total score for the assessment is determined by summing weighted scores for each assessment attribute:

$$\text{Total\_Score} = \sum_{i=1}^{n} (\text{Weight}_i)(\text{Score}_i)$$

where n is the number of assessment attributes in the template.

The score is also calculated as a percentage of the maximum score possible:

$$\text{Max\_Total\_Score} = \sum_{i=1}^{n} (\text{Weight}_i)(\text{Max\_Score}_i)$$

where Max_Score$_i$ is the largest score for any value in the Attribute Values list for the ith attribute. This is the Max Child value shown in the Assessment Attributes applet. (For example, in the assessment example in the "Business Scenario for Sales" on page 259, the largest score for Attribute 2 is 6 and the largest score for Attribute 3 is 10.)

About Configuring Activities

This section describes some aspects of the activities that configurators or administrators may want to change:

- Configuring Owner and Employee Fields
- Creating TAS Customer Milestone Templates in a Localized Application

Configuring Owner and Employee Fields

Depending on your business process, you may want to configure the Siebel application so that the Employees and Owner fields for activities are *always* left blank when the activity is created. (The Owner field displays the primary from the Employee field.)

To achieve this, use Siebel Tools to set the pre-default value of the Primary Owned By field (which maps to the Owner field that appears in the UI) in the Action business component to blank.

For information about using Siebel Tools, see *Siebel Tools Reference*.

Creating TAS Customer Milestone Templates in a Localized Application

The sample TAS Customer Milestone activity template is available only in English. If you are running a localized version of the Siebel Sales application (that is, a version in a language other than English) and are using the Target Account Selling (TAS) module, you need to create an activity template of type *Milestone*, as outlined in the following procedure.

To translate a TAS Customer Milestone template for a localized application

1. From the application-level menu, choose View > Site Map > Application Administration > Activity Templates.

2. In the Activity Templates list, query for records of type *Milestone* where *Milestone* is the translation of the English word in the localization language.

   NOTE: For the translation, see the Interface Terminology Look-up manual for your language, or, in the List of Values, look for the Display Value that corresponds to the Language-Independent Code for Milestone. For more information about List of Values, see Chapter 4, "Working with Lists of Values."

   Six records should be found by the query:

   - 1-Request Offering(s)
   - 2-Evaluate Offering(s)
   - 3-Approve / Select
   - 4-Legal / Purchasing
   - 5-Implement
   - 6-Measure

3. For each of the six templates:

   a. Click the Activity Templates Detail view tab.

   b. Make sure that for each detail record, the Type is *Recommended Activity* where *Recommended Activity* is the translation of the English phrase in the localized language. (See note in Step 2.)

   c. Optional: Translate the Description of each detail record into the localized language.

4. Follow the procedure for adding a milestone in the *Siebel Sales User Guide*. Make sure that the six Activity Templates (Step 2) appear in the Event field drop-down list.

Opportunities 12

The Opportunities screen allows you to manage and track information associated with a potential revenue-generating event. Using the Opportunities screen, you can gather customer requirements, review information about the customer, assemble a sales team, review and update information about competitors, track activities, track private notes and team notes, create quotes, and automatically generate presentations and proposals.

About Opportunity Workflows

Opportunity workflows enhance lead routing and provide sales professionals with greater visibility into their sales activities. These workflows are executed from the Opportunities screen. An opportunity record describes important information about the opportunity such as the account, potential revenue of the deal, the probability of closure, the lead status and sales stage, the sales team primary, and the expected close date.

The predefined opportunity workflows allow you to use email to capture information related to the opportunity and distribute timely notifications to key members of the sales team. These workflows help improve the efficiency and effectiveness of the sales cycle while also providing sales representatives and sales managers greater visibility into sales activities. The email notification process is activated only if the opportunity has a possible revenue of more than $50,000.

The seven predefined opportunity workflows are:

- Opportunity Assigned Notification Process
- Opportunity Inactive Notification Process
- Opportunity Lost Notification Process
- Opportunity Pending Notification Process
- Opportunity Won Notification Process
- Create rerouted Oppty Activity
- Get Manager Email

For information about configuring, implementing, testing, and monitoring workflows, see *Siebel Business Process Designer Administration Guide.*

Setting Up Opportunity Notification Workflows

Follow these steps to correctly set up the opportunity workflows:

- Revise all Siebel workflows so that they are editable and have a status of *In Progress*. All Siebel workflows are initially inactive and cannot be edited. Make any necessary changes and activate the workflows.
- Verify that the Workflow Server component and the Communication Manager component are enabled and running. For detailed instructions, see the system requirements and supported platform documentation for your Siebel application.
- Set up the communication profile. See "Setting Up the Communications Profile."
- Set up and activate the workflows and policies.
  - Activate the opportunity workflow processes. See "Activating the Opportunity Notification Workflow Processes and Policies" on page 281.
  - Modify Opportunity workflows, as necessary. See "Modifying Opportunity Workflows" on page 286.
  - Set up the Create Reroute Oppty Activity. See "Rerouting an Opportunity" on page 285.
  - Set up the Get Manager Email. See "Setting Up the Get Manager Email" on page 288.
- Load runtime events for the emails. See *Siebel Business Process Designer Administration Guide*.
- Generate the triggers. See *Siebel Business Process Designer Administration Guide*.
- Run the workflow monitoring agent. See *Siebel Business Process Designer Administration Guide*.

Setting Up the Communications Profile

You must specify the communications profile before using the notification workflows.

To set up the communications profile

1. From the application level menu, choose View > Site Map > Communications Administration > Communications Drivers and Profiles.
2. Select the record for the Internet SMTP/POP3 Server driver.
3. Click on the Profiles tab, and create a new profile. Name the profile *Opportunity Notification Profile*.
4. In the Profile Parameter Overrides list, enter records and values for the following fields:
   - From Address
   - SMTP Server

For more information about implementing and configuring communications integrations for your Siebel applications, including creating profiles for the Internet SMTP/POP3 Server driver, see *Siebel Communications Server Administration Guide*.

Activating the Opportunity Notification Workflow Processes and Policies

There are five different workflow processes that will generate automatic emails. All of these processes need to have the communication profile specified. See "Setting Up the Communications Profile" on page 280.

- Opportunity Assigned Notification Process
- Opportunity Inactive Notification Process
- Opportunity Pending Notification Process
- Opportunity Lost Notification Process
- Opportunity Won Notification Process

The following procedure sets up this automatic notification process.

To set up the opportunity workflows

1. From the site menu, choose View > Site Map >Siebel Business Process Administration > Workflow Processes.
2. Query for Opportunity *Notification*.

   The five processes are displayed.
3. Select each process and click Revise. Each time you click Revise, a new version of the process is created with a status of In Progress.
4. One by one, select each new In Progress process and click Process Properties.
5. In the Communication Profile field, enter *Opportunity Notification Profile*.
6. Make any other necessary modifications to the workflow processes.
7. Activate each process.
8. From the application-level menu, choose View > Site Map > Siebel Business Process Administration > Workflow Policies.
9. In the Policy Group list, query for Opportunity Workflow Group.

10 Clear the Expiration field for each of the five workflow policies that result from the query.

Opportunity Assigned Notification Process

This workflow sends an email message to both the primary sales representative and the sales representative's direct manager when a new lead is assigned to a sales representative. The email provides the basic information about the opportunity, including the opportunity ID and account, the primary revenue amount, and the number of days allowed before the lead is withdrawn and rerouted. The sales representative is directed to the Opportunities screen for further details.

Opportunity Inactive Notification Process

This workflow sends out an email notice when the sales representative has accepted a lead by changing the Status field to Accept, but has not taken any action on the lead for 30 consecutive days. An email reminder is sent to both the sales representative and the sales representatives direct manager. The notice reminds the sales representative that if no action is taken on the lead within seven days, the lead will be withdrawn from the queue and rerouted.

The default time lapse between when the lead is accepted (or last worked on) and when the email is delivered is 30 days. This default can be modified.

To change the time lapse between lead acceptance and inactive notification

1. From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Processes.
2. Query and select the Opportunity Inactive Notification Process.
3. Click the Process Properties tab.
4. In the Duration Days column, click the Default Number field, and modify the number.

   By default, the units are in days. To modify this, navigate to the Workflow Processes and click the Process Designer tab. Double-click the Wait step. In the Input Arguments applet, change the Sleep Unit value field.
5. In the Workflow Processes view, make sure the Opportunity Inactive Notification Process is selected.

6 Activate the workflow and run the Workflow Monitor Agent. See *Siebel Business Process Designer Administration Guide*.

NOTE: Out-of-the-box reassignment of leads is executed manually. You may want to create a workflow that automatically reassigns the lead to a sales manager or administrator after a specified amount of time.

Opportunity Pending Notification Process

This workflow sends an email notice when the sales representative has not responded or taken action on the opportunity for five days. This occurs when the sales representative has not changed the Status field from pending to accept, reject, or reroute. The email is sent to both the primary sales representative and the sales representative's direct manager. The email reminds the sales representative to act on the lead or risk having the lead withdrawn from the queue.

To modify the time lapse between lead assignment and email delivery

1. From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Policies.
2. Query for E*N*P* (email notification of pending opportunity).
3. Verify that the policy is activated.
4. Select the policy and modify the Duration and Unit(s) fields.
5. Activate the workflow and run the Workflow Monitor Agent. See *Siebel Business Process Designer Administration Guide*.

Opportunity Lost Notification Process

This workflow sends an email message to both the primary sales representative and the sales representative's direct manager when an opportunity is closed with a loss. The status of the opportunity must change to *lost* before the email notice is generated. The email refers to the Opportunities screen and asks the sales representative to update the Reason field.

Opportunity Won Notification Process

This workflow sends an email message to both the primary sales representative and the sales representative's direct manager when an opportunity is closed with a win. The status of the opportunity must change to *win* before the email notice is generated. The email refers to the Opportunities screen and asks the sales representative to update the Reason field.

Rerouting an Opportunity

The Create Rerouted Oppty Activity workflow is executed when a sales representative receives a lead and changes the Status field to Reroute. The workflow creates a new Activity record with Type = Reroute for the designated sales operator. This informs the sales operator that a specific opportunity has been requested for rerouting. All reassigned opportunities are listed in the Activities view as rerouted activities.

NOTE: If a sales manager or sales administrator is responsible for rerouting leads, you can modify the workflow so that the Create Rerouted Oppty Activity is assigned to the sales manager or administrator. You can also create a workflow that reassigns the lead to a sales manager or administrator.

To set up the opportunity reroute activity

1. From the Site Map, choose Siebel Business Process Administration > Workflow Processes.
2. Locate and select the Create Reroute Opportunity Activity workflow process.
3. Click Revise.
4. Click the Process Properties tab.

   The Status field should indicate In Progress.
5. In the Sales Operator Login field, replace the default with the login of the sales operator who will receive the activity. Remember that the login is case-sensitive.
6. Click the All Processes tab.
7. Click Activate.

Modifying Opportunity Workflows

An administrator can modify the opportunity workflows; the email language can be modified, the notification time can be changed, and lead notification restrictions can be set.

NOTE: The opportunity workflows are shipped as seed data. To modify a workflow, you should make a copy of the original workflow, and then modify the copy.

To modify the language of an opportunity workflow email

1. From the application-level menu, choose View > Site Map > Business Process Administration.
2. Select Workflow Processes.
3. Select or Query for the workflow you want to modify.

   To view all seven opportunity workflows, type “O*N*”.
4. Click the Process Designer tab in the middle applet.
5. Double-click the Send Out Emails rectangle.

   The Business Service Input Arguments view appears.
6. In the Input Arguments applet, find the input argument called Message Body and click on the Value field.

   The email message text is displayed.
7. Make any required text changes. The text includes field placeholders for data from the opportunity record. These placeholders appear as “ + [Placeholder field] + ”.
8. Activate the workflow and run the Workflow Monitor Agent. For more information, see *Siebel Business Process Designer Administration Guide*.

To restrict conditions for delivery of emails

1. From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Policies.

2. Select or Query for the workflow you want to modify.

   To view all five email notification policies, type “E*N*”.

3. Select the policy to modify.
4. In the Conditions applet, select a condition, or add a new condition.
5. Click on the Operation and Value fields and modify the condition.

   For example, to send email notifications for leads that have a high lead quality, add the following condition:

   Condition Field = Opportunity Lead Quality

   Operation = “ = ”

   Value = “1-excellent”

6. Activate the workflow and run the Workflow Monitor Agent. For more information, see *Siebel Business Process Designer Administration Guide*.

To stop sending email notifications to a sales representative’s manager

1. From the application-level menu, choose View > Site Map > Business Process Administration.
2. Query for Get Manager Email.
3. Click Revise.
4. Click the Process Designer tab.
5. In the designer palette, click the Connector object and drag a connector between the Start and End boxes.
6. Delete all other arrows.
7. Activate the workflow and run the Workflow Monitor Agent. For more information, see *Siebel Business Process Designer Administration Guide*.

Setting Up the Get Manager Email

This process identifies the manager of the sales representative so that the manager can receive a copy of the five email notifications that are delivered. Because the Get Manager Email process is part of the five notification processes, the Get Manager Email process must be activated for the other processes to function correctly.

An email is sent to the sales representative and the appropriate manager for each of the notification workflows.

To enter the manager's email ID

1. From the Site Map, choose Siebel Business Process Administration > Workflow Processes.
2. Query for the Get Manager Email workflow.
3. Click Revise.
4. Click Activate.

Opportunity Audit Trail

The Opportunity Audit Trail allows users to track changes that have been made to the opportunity record. Any time a member of the opportunity sales team creates a new opportunity record, updates the opportunity, deletes data, or copies the opportunity, the action is tracked in the Opportunity Audit Trail view.

Initially, changes to the following fields are tracked:

- Revenue class
- Probability
- Stage
- Stage ID
- Status

To track additional fields

1. From the Site Map, select Audit Trail Administration.
2. Query for the Opportunity Bus Comp.
3. Click on the Field tab in the bottom applet.
4. Create a new record and select the new field to track from the list of values.

To enable Audit Trail

1. By default, Audit Trail is not activated. To activate it, navigate to Siebel Tools > Business Services > Audit Trail Engine > User Property.
2. Set Enable to True.

Setting Up Lead Sources for Opportunities

Lead sources for opportunities are added, modified, and deleted through the Lead Sources view of the Data Administration screen.

The following procedure describes how to add lead sources so that they can be associated with opportunities.

In addition, campaigns automatically appear as lead sources of type Marketing Campaign. For more information about Campaigns, see *Siebel Marketing Guide*.

To create a lead source

1. From the application-level menu, choose View > Site Map > Data Administration > Lead Sources.
2. Create a new Lead Sources record and complete the necessary fields.

Calendar 13

This chapter describes the resource and calendar access tasks performed by the administrator.

About Resources

Resources are typically things such as conference rooms and audio-visual equipment that are reserved and used by employees for meetings and other calendar activities. Resources have availability associated with them and can be invited as participants to calendar activities in much the same way as employees and contacts are invited to calendar activities. For more information about adding participants to activities, see *Fundamentals*. The administrator is responsible for setting up and maintaining the list of resources.

About Calendar Access

Normally employees grant each other access to their calendars as described in *Fundamentals*. However, there are various situations when the administrator may be required to add, modify, or delete calendar access for employees.

Business Scenarios for Calendar Administration

These scenarios provide examples of calendar tasks performed by the administrator. Your company may follow a different process according to its business requirements.

Resource Administration

Here are two scenarios requiring resource administration:

- Before the Siebel application is rolled out to end users, the administrator creates resource records. He creates resource records for all the conference rooms for the various floors and buildings of the company's sites. He also creates resource records for the audio-visual equipment that employees may want to reserve for use at their meetings.

- After the Siebel application is rolled out, the company grows and more sites and conferences rooms are added. Old audio-visual equipment is discarded and new equipment is purchased. The administrator continues to maintain the list of resources, keeping it up-to-date.

See "To administer resources for calendar activities" on page 295 for the procedure associated with these scenarios.

Calendar Access Administration

Here are three scenarios requiring calendar access administration:

- Employee A is out of the office unexpectedly. Employee B needs to view Employee A's calendar so that she can cancel his appointments. Employee B asks the administrator to give her access to Employee A's calendar. See "To give Employee B access to Employee A's calendar" on page 296.

- An executive has been granted access to many of his colleagues calendars. When the executive moves to a new division, he no longer needs to access to these employees' calendars. He asks the administrator to clear the list by removing his name from all employees' Calendar Access List views. Alternatively, the executive could have contacted all the employees whose calendars are on his Owner drop-down list and asked each of them to remove his name from their calendar access lists. See "To remove all employees from an employee's Calendar Owner drop-down list" on page 298.

- When an employee leaves the company, the administrator removes the employee's name from the Owner lists of other employees. See "To remove an employee from all employees' Calendar Access List views" on page 298.

Example Process Flow for Calendar Administration

Figure 14 illustrates the process flow for the business scenario.

Setting up of resources is completed before the end users begin to set up meetings. Other tasks are carried out according to the company’s business needs.

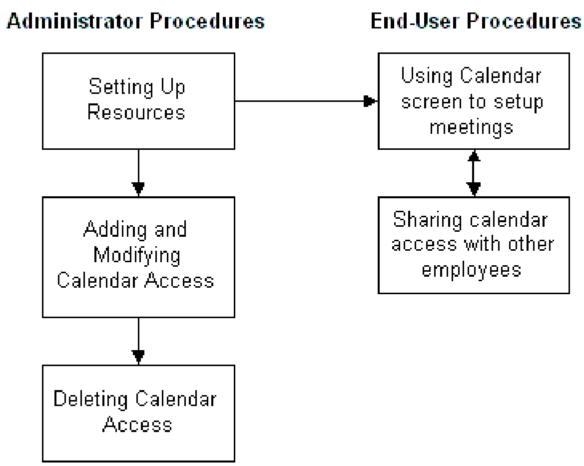


Figure 14. Example Process Flow

Setting Up Resources

To administer resources for calendar activities

1. From the application-level menu, choose View > Site Map > User Administration > Resources.
2. In the Resources list, create a new record or select an existing record, and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Resource #	An automatically generated unique number for the resource.
Site	The choices in this drop-down list are configured by using the RESOURCE_SITE type in the List of Values.
Type	The choices in this drop-down list are configured by using the RESOURCE_TYPE type in the List of Values.

   TIP: If the Description and Site fields are not sufficient to identify the resource, other fields can be added to the Resources list applet. For example, your company may want to add Building Number and Floor fields to help end users find and identify resources. For information on adding creating and exposing fields, see *Siebel Tools Reference*.

3. Delete resource records as required from this list.

Adding and Modifying Calendar Access

There are two Calendar Administration applets on the Calendar Administration view; both can be used to modify calendar access:

- Access Received lists all the calendars that the selected employee can access.
- Access Granted lists all the employees who can access the selected employee's calendar.

You can toggle between these applets using the Access Granted/Access Received drop-down list in the lower applet.

To give Employee B access to Employee A's calendar

1. From the application-level menu, choose View > Site Map > User Administration > Employees.
2. In the Employees list, select the employee (Employee A).
3. Click the Calendar Administration view tab.
4. From the drop-down list on the Calendar list, select Access Granted.
5. In the Calendar list, create a new record or select an existing record and complete the Last Name and Update Access fields.

Field	Comments
Last Name	This is the name of the Employee B who wants to access Employee A's calendar.
Update Access	If this is selected and marked Y, Employee B has read/write access to Employee A's calendar. If this is marked N, Employee B has read-only access to Employee A's calendar.

To view all the calendars to which an employee has access

1. From the application-level menu, choose View > Site Map > User Administration > Employees.

2. In the Employees list, select the employee.
3. Click the Calendar Administration view tab.
4. From the drop-down list on the Calendar list, select Access Received.

   The Calendar Administration list shows all calendars to which the employee has access.

NOTE: Records can be added, modified, and deleted from this view.

Deleting Calendar Access

For a selected employee, the administrator can delete all employees from the Access Granted or the Access Received list.

To remove all employees from an employee's Calendar Owner drop-down list

1. Navigate to the Calendar Administration view by following Step 1 to Step 4 in "To view all the calendars to which an employee has access" on page 296.
2. Make sure that you have selected the employee whose Calendar view Owner drop-down list you want to clear.
3. From the menu button in the Access Received list, select Delete All.

   This command deletes *all* records in the list. The employee selected in the Employees list no longer has access to *any* calendars other than his or her own.

   NOTE: Alternatively, you can use the Delete Record command to remove just one selected employee from the employee's calendar owner drop-down list.

To remove an employee from all employees' Calendar Access List views

1. Navigate to the Calendar Administration view by following Step 1 to Step 4 in "To give Employee B access to Employee A's calendar" on page 296.
2. Make sure that you have selected the employee that you want to remove from all employees' calendar access lists.
3. From the menu button in the Access Granted list, select Delete All.

   This command deletes *all* records in the list. The calendar of the employee selected in the Employees list can not longer be accessed by *any* other employees.

   NOTE: Alternatively, you can use the Delete Record command to delete the employee from one selected employee's calendar access list.

About Configuring the Calendar

This section describes some aspects of the Calendar feature that configurators or administrators may want to change:

- Alarm Manager Load Frequency
- About Configuring the Calendar Gantt Chart
- Days for Retroactive Alarms on page 300
- About Changing Required Fields in the eCalendar Detail Applet on page 301
- Removing the To Do List from the Calendar View on page 301

Alarm Manager Load Frequency

A system preference called Alarm Manager Load Frequency determines how frequently the calendar alarm queries the server for alarm-enabled appointments. The default value is 60 minutes, but you may want to change this time to better suit your business needs: querying the server less frequently results in fewer SQL calls. However, each SQL call will take longer to execute. In certain cases, this trade-off will result in improved performance. (Also, if the alarm frequency is less than the session timeout set in the eapps.cfg file, sessions will never timeout.)

For information on how to edit system preferences, see "Setting System Preferences" on page 52.

About Configuring the Calendar Gantt Chart

You can edit applet user properties in Siebel Tools to configure the Participant Availability Gantt chart (Calendar Detail view) as follows:

- **Set the number of days displayed in the Gantt chart.** By default, the chart displays the day of the appointment plus the two days following the appointment day (Gantt Previous Days = 0 and Gantt Lookahead Days = 2).
- **Add or delete buttons.** By default all four buttons are displayed.

Configure the HI Gantt Chart Applet by editing the user properties listed in Table 21.

Table 21. User Properties for Days Displayed on the HI Gantt Chart Applet

Applet User Property	Description	Allowed Values
Gantt Previous Days	Number of days before current date that will be displayed	0, 1, 2, 3 . . .
Gantt Lookahead Days	Number of days after current date that will be displayed	0, 1, 2, 3 . . .
Enable AddEmployee	Enables and disables the Add Employee button	Y, N
Enable AddContact	Enables and disables the Add Contact button	Y, N
Enable AddResource	Enables and disables the Add Resource button	Y, N
Enable RemoveParticipant	Enables and disables the Remove Participant button	Y, N

For information about:

- Participant Availability Gantt chart, see *Fundamentals*.
- Editing user properties, see *Siebel Tools Reference*.

Days for Retroactive Alarms

Retroactive alarms are alarms for past events that did not display before the event because the user was not logged in. By default, the application is set to display retroactive alarms for missed events up to 14 days in the past. You can change the number of days for retroactive-alarm display by editing the RetroAlarmInterval user property of the Alarm Manager business service.

For more information about editing user properties, see *Siebel Tools Reference*.

About Changing Required Fields in the eCalendar Detail Applet

In the preconfigured application, the Type field is the only required field in the Calendar Detail form in the Calendar Detail view. If you make other fields required, you must predefault these fields. This is because when users create a new record or drill into a record from the calendar grid, an implicit save of the record is triggered. If any fields are required but not predefaulted, their values will be null when the implicit save is triggered and an error message will be generated.For more information about predefaulting fields, see *Siebel Tools Reference*.

Removing the To Do List from the Calendar View

You can configure the daily, weekly, monthly calendar view (HI Activity Calendar View) so that the Calendar To Do list applet does not appear.

You might choose to do this if your employees do not use the To Do list or if you need more space for the calendar applet on the view.

To remove the To Do list from Calendar views

1. Open the CCViewHIC.swt file in a text editor.

   For more information about SWT (Siebel Web Template) files, see *Siebel Tools Reference*.

2. Comment out the following text (the first line is already commented):

```
<!--Column 2 -->

<td valign="top" width="21%">

   <swe:for-each count="20" iteratorName="currentId" startValue="201">

      <swe:applet hintMapType="Applet" id="swe:currentId" property="Formatted…

   </swe:for-each>

</td>
```

3. Save and close the file.

Correspondence 14

Siebel Correspondence allows employees and partners to generate correspondence from any location with access to the Web. It also makes it easy for them to direct correspondence to fulfillment centers that print and mail it, so they can produce and send correspondence even if they are on the road and do not have access to a printer.

For example, if salespeople want to do mass mailings to customers in cities where they are giving presentations, Siebel Correspondence allows them to log on from any location where they have Web access. Then they can create personalized form letters to invite customers in a specific city to a specific presentation, and direct these letters to be printed and mailed by a fulfillment center.

First, an administrator creates templates (which are similar to form letters) that employees and partners can use for their everyday correspondence. Then, employees and partners can automatically generate correspondence based on this template and on information in Opportunity and Account records.

This chapter describes how the administrator sets up Siebel Correspondence.

For information about how the end user generates correspondence, see *Siebel Sales User Guide*.

System Requirements for the Web Client

To use Siebel Correspondence, you must have:

- Siebel Document Server, including Siebel Correspondence engine, installed on a Windows server. The document server can be installed during installation of the Siebel Server.
- Microsoft Office installed on the server.
- All of the components that are required to use Siebel 7.5 software installed on the server, such as a Siebel Server and a Web Server.

NOTE: If you are deploying Siebel Server in UNIX and need Siebel Correspondence, a separate Windows machine is required for Siebel Correspondence.

Siebel Correspondence uses the Document Server, a new component of the Siebel Server which lets users on the Web work with Word documents that are on the server.

Your employees or partners who use Siebel Correspondence need:

- A Web browser to use the product
- Optionally, Microsoft Word to edit documents

For information on the Web browsers that are supported, see *Release Notes*.

System Requirements for the Remote Web Client

Siebel Correspondence is available for the Siebel Remote Web Client as well as for the Siebel Web Client. The user interface for Correspondence is identical in the Remote Web Client and the Web Client.

However, the Remote Web Client processes requests to generate documents locally, so field sales representatives can generate proposals, presentations, and correspondences while traveling.

To run Siebel Correspondence on the Remote client, you must have Microsoft Word installed on the same machine as the Remote Client.

Installing the Document Server

Siebel Correspondence, Siebel Presentations, and Siebel Proposals all use the Siebel Document Server to generate Microsoft Word and Microsoft PowerPoint documents through the Web.

To install the Document Server, perform the following steps:

- Obtain the required hardware.
- Install the Siebel Server.
- Install third-party applications.

After installing the Siebel Server, you may have to follow some of the steps described in "Configuring the Document Server" on page 307. The Document Server is a component of Siebel eDocuments, which can be installed during installation of the Siebel Server. Consult with your system administrator to verify that the Document Server has been installed and configured according to the requirements listed in the following sections.

Hardware Requirements

The Document Server is supported on the Windows 2000 platform. To maintain stability and performance, the Document Server must run on a dedicated host machine. The Siebel Server on this machine should host one instance of the Siebel eDocuments component group. No other components should be running other than required system components.

To support more users, you can run additional instances of the Siebel eDocuments component group on additional dedicated host machines.

Installing the Siebel Server

Install the Siebel Server on the dedicated host machine of the Document Server. For more information about installing the Siebel Server, see *Siebel Server Installation Guide for Microsoft Windows*.

During installation, you will have the option to enable component groups. Select the Siebel eDocuments component group. Do not enable any other component groups.

This step can also be performed after installation is complete, as described in the section "Enabling the Component Group" on page 307.

Installing Third-Party Applications

You must install Microsoft Word.

To install Microsoft Office

1. Log on to the server machine using the same user account that the Siebel Server NT service uses. This user account must belong to the Administrators group.

   NOTE: The install must use the same account to be used by the NT Service. The installer configures COM security settings so that the installing user account will have the correct permissions to access and launch the application. If the install uses an account other than the Siebel Server NT service account, errors may occur when the Document Server tries to launch the application.

   ---

2. Install Microsoft Office using a Typical, or complete, installation. Verify that your version of Microsoft Office will install the Web Authoring Tools (HTML) component with the Typical installation. If it does not, you will need to use the Custom installation option, and install all of the typical components as well as the Web Authoring Tools (HTML) component.

3. Start the applications that will be used by the Document Server. This forces the applications to register themselves.

4. Close the applications.

Configuring the Document Server

After finishing the installation steps, perform the following steps to configure the Document Server:

- Enable the component group
- Set MaxTasks to 1
- Set the Honor MaxTasks parameter
- Synchronize components
- Configure report generation (optional, only used by Proposals)
- Enable HTML generation (optional)
- Configure application recycle period (optional)
- Specify the target server (optional)
- Enable additional logging (optional)

NOTE: Whenever the Siebel application server is restarted, the Document Server must also be restarted *after* the Siebel application server has been brought up.

Enabling the Component Group

If you have not already done so during installation, you must enable the component group named Siebel eDocuments. This group contains the DocServer component, which generates Correspondence, Presentations, and Proposals. For more information about enabling this group, see *Siebel Server Administration Guide*.

Setting MaxTasks to 1

Due to design limitations, third-party applications can only process one document at a time. This means that each instance of the Siebel Document Server should only process one task at a time.

To set the MaxTasks parameter to 1

- See the section about Siebel Application Object Manager parameters in the *Siebel Server Administration Guide*.

NOTE: If MaxTasks is greater than 1, then an error message is sent to the log file as an alert. Processing of the request continues, but results are unpredictable when two requests arrive at the same time.

Setting Honor MaxTasks

Honor MaxTasks is a Siebel Application Object Manager parameter that affects the queuing process and the performance of Document Server. Refer to Table 22.

Table 22. Honor MaxTasks Parameter for the Document Server

Setting	Behavior
TRUE [1]	All requests to Document Servers queue on the SRM_REQUEST table; requests are not assigned to a Document Server until one is free to take the request.
FALSE	Requests are queued on the DocServer component's internal queue. If the Document Server stops processing (for example, crashes) all queued processes on that server are lost.

1. This is the recommended value.

To set the Honor MaxTasks parameter

- See the section about Siebel Application Object Manager parameters in the *Siebel Server Administration Guide*.

Synchronizing Components

This step is not specific to the Document Server, but is a required post-installation step for the server infrastructure. For information about synchronizing components, see *Siebel Server Administration Guide*.

Configuring Report Generation (Optional)

f you plan to include Report sections in Proposals, you must specify the Actuate connect string. Set this parameter on each object manager that will be submitting document requests. The value of the parameter will be included in the request sent by the object manager to the DocServer. When DocServer begins processing the request, it will use the parameter to connect back to the object manager to retrieve data for the report.

To specify the Actuate connect string

1. Start the Server Manager.
2. Change the server parameter ActuateConnStr to contain the following information:

   ```
   siebel.tcpip://gatewayserver:port/enterpriseserver/objectmgr/
   siebelserver
   ```

For example, if *gtwy* is the gateway server host, *Sieb01* is the Siebel Server, *siebel* is the Enterprise Server, and you want to run your proposal with report section on callcenter, whose object manager is *SCCObjMgr*, you should enter the following command:

```
srvrmgr> change param ActuateConnStr=siebel.tcpip://gtwy/siebel/
SCCObjMgr/Sieb01 for comp SCCObjMgr
```

The parameter ProposalReportTimeoutInSecond also affects the generation of reports. This is the time-out setting that controls how long the Document Server component will wait for a report to be generated. The default value is 1800 seconds.

Enabling HTML Generation (Optional)

By default, correspondence is only saved in document format, not in HTML format. The user’s View HTML button is unavailable, and the user cannot view the correspondence in HTML format.

The server parameter DocumentServerViewHTML specifies whether the Document Server generates HTML versions of documents. The default value is FALSE. By default, the Document Server only generates documents in their native format, and not in HTML. To allow the user to display correspondence in HTML format, you must edit the parameter DocumentServerViewHTML to give it the value True instead of False. Any documents generated after the parameter is enabled is saved in both formats.

When you generate HTML documents, a copy of the generated document is created in HTML and stored in the Siebel File System. This may affect performance, and it will increase the storage space required in the File System. The clarity of the HTML document depends on your Office application's ability to translate its native format into HTML.

Entering the following command allows generation of HTML versions of Correspondence, Proposals, and Presentations.

To enable generation of HTML versions of documents

1. Start the Server Manager.
2. Enter the command:

   ```
   Srvrmgr> change param DocumentServerViewHTML=True for comp
   DocServer
   ```

NOTE: While this procedure uses the Server Manager, parameters can also be changed using the Server Administration interface. For more information, see the *Siebel Server Administration Guide*.

Configuring Application Recycle Period (Optional)

You use the parameter MSWordLiveCount to control how often the office applications are restarted.

Each parameter can be set to a positive integer that specifies the number of documents to be processed before it shuts down and restarts the corresponding office application. A value of 0 (the default) indicates that the applications will not be shut down. If the parameter value is set to any integer other than 0 and the Document Server fails to launch, the corresponding application will be shut down and then restarted again.

To change the values of these parameters

1. Start the Server Manager.
2. To change the application recycling period for Microsoft Word, which is used by Correspondence and Proposals, enter the command:

   ```
   Srvrmgr> change param MSWordLiveCount=5 for comp DocServer
   ```

3. To change the application recycling period for Microsoft PowerPoint, which is used by Presentations, enter the command:

   ```
   Srvrmgr> change param MSPPLiveCount=5 for comp DocServer
   ```

Specifying the Target Server (Optional)

If you are running multiple Document Servers within the same enterprise, then the server infrastructure will route document requests to different Document Servers in order to achieve load balancing.

However, it sometimes may be useful to specify that all requests be routed to one Document Server. For example, you can do this to help diagnose a server problem.

To route all requests to one document server

1. Start the Server Manager.
2. Enter the command:

   ```
   srvrmgr> change param DocumentServerName=DocSrvr1
   ```

Enabling Additional Logging (Optional)

Optionally, you may want to enable additional logging, which can be helpful for debugging.

The event logging system writes events to the log file based on the log level for each event type. The number you specify indicates the filtering level for logging. The default value is 3, which means that events with a level of 1, 2, or 3 will be logged, while events with a level of 4 or 5 will be suppressed. Setting the filtering level to 5 means that all events will be logged.

NOTE: In the final command on the list, the parameter must be in quotation marks, because it has a space in it. In the other commands, quotation marks are optional and are not included in the list.

To enable additional logging

1. Start the Server Manager.
2. Enter the following commands:

```
srvrmgr> change evtloglvl GenericLog=5 for comp Docserver

srvrmgr> change evtloglvl ProposalDebug=5 for comp Docserver

srvrmgr> change evtloglvl ProposalDetail=5 for comp Docserver

srvrmgr> change evtloglvl PresentationDebug=5 for comp Docserver

srvrmgr> change evtloglvl PresentationDetail=5 for comp DocServer

srvrmgr> change evtloglvl DocServerDebug=5 for comp DocServer

srvrmgr> change evtloglvl DocServerDetail=5 for comp DocServer

srvrmgr> change evtloglvl CorrespDebug=5 for comp DocServer

srvrmgr> change evtloglvl CorrespDetail=5 for comp DocServer

srvrmgr> change evtloglvl MSProjectDebug=5 for comp DocServer

srvrmgr> change evtloglvl "MS ProjectDetail"=5 for comp DocServer
```

For more information about event logging, see *Siebel Server Administration Guide*.

About Working with Correspondence Templates

Siebel correspondence templates are created and edited in Microsoft Word (DOC file format). Templates contain fixed text and one or more merge field. The merge fields are placeholders that will be populated with variable information from your Siebel database, such as a Contact's name and address, when users generate a correspondence for one or more recipients.

Users can create their own personal templates, and administrators can create templates for users. To modify or add a template, Microsoft Word must be installed on your computer.

The fixed text of each correspondence template is written using specific locale conventions and language. In order to support Global Deployment, the author of the template can explicitly indicate the locale and language using the Locale and Language fields in the template record. The Document Server then uses these settings to substitute correctly localized data into the mailmerge fields of the template. The following types of fields are affected:

- MLOV fields
- Global data fields
- Locale-sensitive fields, such as dates and currencies

The data source for Word merge fields that are available to be included in Siebel correspondence templates is in the Siebel.html file. Administrators can augment the set of merge fields available using Siebel Tools. For information, see "Configuring Additional Merge Fields" on page 325.

Guidelines for working with correspondence templates include the following:

- One correspondence must be generated before the Siebel.html file will appear for the first time. In most cases, the first generated correspondence template will be one of the Siebel sample templates. Once the Siebel.html file appears, you can use it to create custom templates.
- A template must contain at least one merge field in order to generate a correspondence.
- Each time a user clicks Generate or Generate Label, the Siebel.html file is overwritten.

- Each time a user clicks Generate or Generate Label, the variable data in the data file replaces the merge fields in the Siebel.html file, based on the template format chosen, and a customized correspondence document is created for each recipient on the list.
- Check the status of the document or label by clicking the Update button and reviewing the Document Status field. See Table 23.

Table 23. Document Status Field

Status	Meaning
In Queue	Request sent to available document server.
Generating	Document server is creating the Word merge document.
Completed	Document is available and can be accessed from the Generated Document field.
Failed	Document server encountered errors. Check the Document Error and Label Error fields for error messages.

- It is recommended that you make the template inactive prior to modifying it. You make the template inactive by deselecting the Active field. This will prevent other users from attempting to create correspondences using this template at the same time you are modifying it. After you have finished your modifications, check the Active field again.
- The Siebel.html file is located in the Reports subdirectory on the Siebel Server.

NOTE: You should always perform system administration tasks, such as administration of correspondence templates, against the server database. Although you can perform these tasks against your local database and synchronize, doing so has the potential to cause errors, including data conflicts. In addition, performance problems can result from a large local database, and from routing large numbers of transactions.

For information about which versions of Microsoft Word are supported, see *Release Notes* and *Siebel System Requirements and Supported Platforms* for your Siebel application.

Using the Sample Correspondence Templates

You should change the text in the sample correspondence templates packaged with Siebel Correspondence to add text that is specific to your company and business.

You may want to change both the text and the merge fields of these sample correspondence templates.

Changing the Text of a Correspondence File

If you only want to modify the text of a correspondence template, you can simply drill down on the template link in Siebel Correspondence to open it and then edit it in Microsoft Word.

NOTE: Be careful not to change the merge fields when you edit the text.

To change the text of a correspondence template file

1. From the application-level menu, choose View > Site Map > Document Administration > Correspondence Template.
2. In the Templates list, drill down on the Template Name hyperlink.

   A dialog box appears asking whether you want to open the file or download it.
3. Select Open this file from its current location, and click OK.

   The template file appears in Microsoft Word.
4. Edit the text using Microsoft Word.
5. Choose File and then click Save to save the changes when you are finished.
6. In the template list, click the icon appearing in the Template Name field.
7. Click Browse.
8. Navigate to the saved template and select the file.
9. In the Add Attachment dialog box, click Add.

Changing the Merge Fields of a Correspondence Template File

The easiest way to change the merge fields in a correspondence template file is to use the Mail Merge feature of Microsoft Word together with the Siebel.html file generated by the Document Server. The siebel.html file contains the names of the fields that are available for merging. After Microsoft Word reads this file, the fields can be selected from a drop-down menu.

To change the merge fields of a correspondence template

1. In the Correspondence Template list applet, drill down on the Template Name field and select the template you want to modify.
2. In the displayed dialog box, select *Open this file from its current location* and click OK.

   The template file appears in Microsoft Word.
3. Add merge fields to the template file. (See either "To add merge fields to the template in Microsoft Word 2000" or "To add merge fields to the template in Office XP.")
4. In the template list, click the icon appearing in the Template Name field of the template you are modifying.
5. Use the Add Attachment dialog box to upload the modified template file.

To add merge fields to the template in Microsoft Word 2000

1. In Microsoft Word, choose Tools, and then Mail Merge.

   The Microsoft Word Mail Merge Helper window appears.
2. In the Mail Merge Helper window under the Main Document heading, click the Create button and choose Form Letters.
3. In the dialog box that appears, click the Active Window button.
4. In the Mail Merge Helper window under the Data Source heading, click the Get Data button and choose Open Data Source.

5. In the Open Data Source dialog box, locate and open the \Siebel\Reports\Siebel.html file.

   NOTE: The Siebel.html appears only after the first correspondence template is generated.

   ---

6. Click the Close button to dismiss the Mail Merge Helper window.
7. If the template file does not yet have merge fields, an information box states this. Click Edit Main Document in the box.

   If the template file already contains merge fields, no box appears. Click the Close button to close the window.

8. When you are finished adding merge fields, click the Mail Merge Helper icon on the Mail Merge Tool bar. In the Mail Merge Helper window, click Create and choose Restore to Normal Word Document. Click Yes to continue.
9. Close the Mail Merge Helper window.
10. Choose File > Save As and save the file on your hard drive, with a new name.
11. Close Microsoft Word.
12. In the template list, click the icon in the Template Name field of the template you are modifying.
13. Use the Add Attachment dialog box to upload the modified template file.

To add merge fields to the template in Office XP

1. In Microsoft Word, choose Tools > Letter and Mailings > Show Mail Merge Tool bar.
2. In the tool bar, click Main Document Setup.
3. In the Main Document Type window, select Letters and click OK.
4. On the Mail Merge Tool bar, click the Open Data Source icon.
5. In the Select Data Source window, locate and open the \Siebel\Reports\Siebel.html file.

6. In the Select Table window, click OK.
7. Edit the text and add merge fields. For each merge field, position the insertion point at the desired location in the template, click the Insert Merge Fields icon, and choose the merge field from the menu.
8. When you have finished adding merge fields, click the Main document setup icon on the Mail Merge tool bar.
9. In the Main Document Type window, select Normal Word Document and click OK.
10. Choose File > Save As and save the file on your hard drive with a new name.
11. Close Microsoft Word.
12. In the template list, click the icon in the Template Name field of the template you are modifying.
13. Use the Add Attachment dialog box to upload the modified template file.

Creating a New Correspondence Template

To add a correspondence template, it is easiest to modify and rename an existing template. The following three procedures step you through this process, in which you:

- Open an existing template file.
- Modify and rename the template in Microsoft Word.
- Add a template record for the new file in Siebel Correspondence.

NOTE: You may create a new correspondence template for a variety of purposes: for a company description, as a mailing label, and so on.

Opening an Existing Template File

To prepare to create a new template, you must drill down on the template link in Siebel Correspondence to open an existing template file.

To open an existing template file

1. From the application-level menu, choose View > Site Map > Document Administration > Correspondence Templates.
2. In the Templates list, drill down on the Template Name hyperlink.

   A dialog box appears asking whether you want to open the file or download it.
3. Select Open this file from its current location, and click OK.

   The template file appears in Microsoft Word.

Modifying and Renaming the Template

Now that the file has been displayed in Microsoft Word, you use Word's mail merge features to modify its merge fields and then save it under a different name. To modify merge fields, see "Changing the Merge Fields of a Correspondence Template File."

Adding a Correspondence Template Record for the New File

Once you have created a new correspondence template in Word, you need to add a record in your Siebel application so your users can access the Word file as a template. Users will see the template in the Template field in the My Correspondence Requests view.

To add a template record

1. From the application-level menu, choose View > Site Map > Document Administration > Correspondence Templates.
2. In the Templates list, create a new record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Active	Indicates whether or not the template appears in the Template list in the My Correspondence Requests view.
Update File	A check mark in this field indicates that users want their copy of the template to be updated automatically each time the original file is updated.
Comments	A description, and information about the template.
Local	Indicates whether or not the template is available on the local hard disk. If a document is not available locally, you can request it by selecting the Request field. The file will be downloaded in your next synchronization session. This field applies to you only if you use Siebel Remote.
Modified	The date that the template file was last modified.
Template Name	The name of the file. Required.
Personal	A check mark in this field specifies that the template will appear in the Personal Template view.
Download File	Allows users to request templates from the server. When a check mark appears in this field, the document is retrieved during the next synchronization session. This field applies to you only if you use Siebel Remote.
Size	The size of the template file.

Field	Comments
Type	The file type of the template file.
Language	The language used by the Document Server to render mail merge fields based on MLOV and Global Data Business Component fields. For more information on these types of fields, see *Siebel Tools Reference*.
Locale	The locale used by the Document Server to render mail merge fields based on locale-sensitive business component fields, such as dates and currencies. For more information on these types of fields, see *Siebel Tools Reference*.

Deleting a Template

If a template is no longer valid, you may want to delete it so that no one uses it by mistake.

To delete a template

1. From the application-level menu, choose View > Site Map > Document Administration > Correspondence Templates.
2. In the Templates list, select the template to be deleted.
3. Click the menu button, and then click Delete Record.
4. When the “Are you sure you want to delete the current record?” prompt appears, click OK.

   The Templates List refreshes and appears without the deleted template.

Inserting Files into Correspondence Templates

The Siebel Correspondence file insertion feature allows you to insert one or more files into a correspondence template.

You may insert file templates containing generic content into one or many correspondence templates. For example, you can create a company description in a separate file insert template and then include it into correspondence templates. If the description changes, you only have to modify the single insertion template instead of every template.

The administrator or user may add a comment indicating that the file is an insert template that should be used by mail merge and inserted into other documents.

You may insert as many files into a correspondence template as necessary. Each file name must be unique.

Each file must be inserted into the correspondence template independently. Insertion files can not be nested. For example, you may insert File1.doc, File2.doc, and File3.doc into a template named FollowUp.doc. But, you may not insert File1.doc into File2.doc, and then insert File2.doc into FollowUp.doc.

You may insert a file template into a public template created by an administrator or a personal template created by a user. Only Microsoft Word files are inserted into Microsoft Office templates. This process is described below.

To insert a file into a correspondence template

1. Create the file insert template.
   a. Using Microsoft Word, create the insert template.
   b. Under the Document Administration Screen, the Correspondence Templates view, add a new record and add the new insert template.
2. Open the Correspondence Template in which the new template file is to be included.
3. Insert a separate line with the following command at the location where the insert template is to be displayed:

`[[File Name]]`

Here, *File Name* is the name of the file created in Step 1.

4 Save the Correspondence Template locally and then reload the template back into the Correspondence Template View.

At run time, the new insert template will merge with the Edited Correspondence Template.

Configuring Additional Merge Fields

During the document generation process, the Document server exports mail merge data into the Siebel.html file. Microsoft Word then reads this file and inserts the data into the merge fields in the template. The exported data is taken from two places:

- If the correspondence was created from a view based on service requests (such as the Service Request screen in Siebel Sales or the Service screen in Siebel Call Center), the data is taken from the Service Request Recipient business component.
- If the correspondence was created by pressing the New button in the Correspondence list view, or from a view not based on service requests (such as the Opportunity screen), the data is taken from the Recipients business component.

New fields in the Recipients Business Component are restricted to those based on columns in the S_CONTACT table or those obtained through join relationships. Joins can be added for tables that have a master-detail relationship with S_CONTACT, where S_CONTACT is the detail table. You need to add the join to the Recipients Business Component if it does not already exist.

New fields in the Service Request Recipient Business Component are restricted to those based on columns in the S_CONTACT table, the S_SRV_REQ table, or columns available through joins to these tables.

Table 24 summarizes the contents of the two Business components and the contexts in which they are used. For more information on adding fields, see *Developing and Deploying Siebel eBusiness Applications* and *Siebel Tools Reference*.

Table 24. Summary of Merge Fields Sources and Uses

Source Business Component	Source Tables	Used In
Recipients	■ S_CONTACT ■ Joins with tables that have a master-detail relationship with S_CONTACT (with S_CONTACT as the detail table).	Correspondence created: ■ Directly in the Correspondence List View ■ From any view not based on service requests
Service Request Recipient	■ S_CONTACT ■ S_SRV_REQ ■ Joins with tables that have a master-detail relationship with one of these two (with S_CONTACT or S_SRV_REQ as the detail table).	Correspondence created from views based on service requests.

To configure an additional merge field

1. Open Siebel Tools.
2. Add the new field to either the Recipients Business Component or the Service Request Recipient Business component. The steps for this depend on the field type you are adding. For more information on adding fields, see *Developing and Deploying Siebel eBusiness Applications* and *Siebel Tools Reference*.
3. Add the name of the new field to the Business Component User Prop called "Export Field #", where # is an integer. If necessary, create additional user properties by incrementing the integer.
4. Compile the project to create a new .srf file.
5. Stop the server.

6 Copy the newly compiled .srf file to the correct location where it will be used by the server (usually \siebel\objects*lang*, where *lang* is the language code for the language setting of the server).

7 Restart the server.

8 Generate a new correspondence document to refresh the siebel.html file.

9 To insert fields into a template, see "Changing the Merge Fields of a Correspondence Template File."

NOTE: You can configure up to 63 additional merge fields; WinWord does not display fields beyond this limit.

About Fulfillment Centers

When your users have completed correspondence and want to send it to the recipient, either they can print out and mail the letter themselves, or they can direct their correspondence to a fulfillment center that prints and mails it for them. A fulfillment center might be a division of your company, such as your marketing department.

You might want to use a fulfillment center for several reasons:

- To let your users produce correspondence in any location where they can access the Internet, even if they do not have a printer.
- To save your users time, since they do not have to print out and mail their correspondence.
- To create consistency in your company's outgoing correspondence.
- To allow one location to fulfill all requests for collateral and literature materials included with correspondence as enclosures.

If you have set up fulfillment centers, the user can generate correspondence and then click Submit to submit the correspondence for fulfillment. When the user clicks Submit, the Status Field of the correspondence request is given the value Submitted, and the request is made read-only. You cannot make any further changes in it without using the Recall command.

Setting Up Fulfillment Centers

To set up a fulfillment center, you perform the following tasks:

- Add a fulfillment center record.
- Give the fulfillment center access to Siebel Correspondence.

Adding, Modifying, and Deleting Fulfillment Center Records

You must create one or more fulfillment center records, so users can select a fulfillment center when they create a correspondence request.

To add a fulfillment center

1. From the application-level menu, choose View > Site Map > Data Administration > Fulfillment Centers.
2. In the Fulfillment Centers list, click the New button.
3. Enter the information described in the following table.

Field	Description
Name	Enter the name of the fulfillment center.
Main Phone #	Enter the telephone of the fulfillment center.
Main Fax #	Enter the fax number of the fulfillment center.
Fulfillment Team	Click the select button, and use the Fulfillment Team dialog box to select one or more employees at the fulfillment center. If necessary, click New to add employees to this dialog box. After you have selected the employees, click Close. These people will be able to view correspondence submitted to this fulfillment center. If there is no one on a fulfillment team, no one will be able to see correspondence submitted to this fulfillment center.
Description	Enter a description of the fulfillment center.

To make other changes

- To modify a fulfillment center record, select a field and change the information.
- To delete a fulfillment center record, select the record, click the menu icon, and then click Delete Record.

Giving the Fulfillment Center Access to Siebel Correspondence

The fulfillment team at the fulfillment center must monitor pending fulfillment requests. Everything submitted by a requestor is visible to the fulfillment team in the Fulfillment screen.

Fulfillment center employees fulfill the request by viewing and printing the correspondence request and including the enclosures listed. The fulfillment center employees may either print the enclosure, or get an already-printed copy (if the enclosure is a glossy brochure, for instance).

If you have licensed Siebel Workflow, you can create a workflow to send email to the fulfillment center automatically whenever there is a new request for it to fulfill.

To give the fulfillment center access to Siebel Correspondence

1. Set up fulfillment center employees as Siebel Correspondence users, in the same way that you set up your own employees or your channel partners as Siebel Correspondence users. For more information about setting up users of Siebel applications, see *Security Guide for Siebel eBusiness Applications*.
2. Give fulfillment center employees a responsibility that lets them see the Fulfillment screen. Use the responsibility in the seed data named Fulfillment Center Employee. For more information about responsibilities, see Chapter 2, “Initial Setup.”
3. Tell fulfillment center employees what URL they should use to view Correspondence through the Internet.

About Monitoring Fulfillment

After they have processed a request, the fulfillment center employees click Done. Clicking Done updates the Status Field of the request to Done, and it creates an activity for each recipient indicating that correspondence has been sent.

Users monitor the status of their correspondence requests by looking at the entry in the Status column of the My Correspondence Requests view to see if the status is Done.

Similarly, a fulfillment center manager monitors the status of pending requests by looking at the entry in the Status column of records in the Fulfillment screen.

About Batch Printing

Batch printing simplifies the task of printing multiple correspondence items. The user first selects one or more Correspondence items, and then selects the Print option from the applet level menu. The documents are then printed on the appropriate printer.

Siebel applications support two types of batch printing, server-based and client based. Initially, the print menu item appearing on the Correspondence and Fulfillment screens is configured to perform client-based printing. However, the Administrator can use Siebel Tools to reconfigure these menus to use server-based batch printing, either in addition to, or instead of, client-based batch printing.

Client-Based Batch Printing

When a user prints a document using client-based batch printing, the Siebel application launches Microsoft Word on the user's client system. It then retrieves the document from the Siebel File System and prints it to the default printer configured for the user's desktop session.

For this feature to work correctly, the end user must configure the browser to allow the Siebel application to launch Microsoft Word. This requires changing the security option called "Initialize and script ActiveX controls not marked safe" to either *Enable* or *Prompt* for the security zone containing the Siebel application URL. Typically, this is either the "Local intranet" zone or the 'Trusted" zone. Users should verify that any other URL in this zone can be trusted with this security privilege.

Server-Based Batch Printing

When a user prints a document using server-based batch printing, a request is sent to the DocServer server component. This component then prints the document to the printer specified by the user in User Preferences. If the user has not specified a preference, the document is printed on the default printer configured on the DocServer machine by the System Administrator.

Setting Up Batch Printing for Administrators and Users

Table 25 lists procedures for setting up batch printing for both administrators and users. Administrators need to set up server-based batch printing; users need to set up both server-based and client-based batch printing.

Table 25. Procedures for Setting Up Batch Printing

Setup Procedures for Administrators	Setup Procedures for Users
Add server Print menu items on the Correspondence and Fulfillment screens	Verify system requirements for client-based batch printing
Set up the printer configuration	Configure Internet Explorer to permit client-based batch printing
Add a printer connection to the DocServer machine	Add a printer connection to the desktop for client-based batch printing
Change the default printer (if necessary)	Change the default printer (if necessary)
	Specify a printer for server-based batch printing

Batch Printing Instructions for the Administrator

As an administrator, you need to set up the server-based batch printing function.

To add server Print menu items on the Correspondence and Fulfillment screens

1. Start Siebel Tools.
2. In the Object Explorer window, under Siebel Objects, select Applet.
3. In the Applets window on the right, enter "Correspondence List Applet" in the Name column and click Query.
4. In the Object Explorer, select Applet Method Menu Item.
5. In the Applet Method Menu Item window, enter "Server Printer" in the Menu Text column and click Query.
6. Highlight the record and uncheck the Inactive check box in the Inactive column.
7. In the Applet Method Menu Item window, enter "Server Print Label" in the Menu Text column and click Query.
8. Highlight the record, and deselect the Inactive check box in the Inactive column.
9. In the Application menu, click Tools and select Compile Projects. In the Project Selection window, pick project "Corresp (SSE)".
10. Browse and select the appropriate siebel.srf file, and click Compile.
11. Repeat Step 3 to Step 10 for the Fulfillment screen, querying for "Fulfillment List Applet" in the Applet window.
12. Verify that "Server Printer" and "Server Print Label" menu items appear in the applet menus of the Correspondence and Fulfillment screens.

Configuring Printers for Server-Based Batch Printing

When a user invokes server-based batch printing on a correspondence document, a request is sent to the DocServer component. This request contains the values for the Default Printer and Printer Driver preferences the user has selected on the Correspondence User Preference screen. After receiving the request, DocServer uses Microsoft Word to convert the document into a PostScript file. The style of PostScript generated is determined by the value for the Printer Driver user preference. This parameter specifies the name of a network printer. The PostScript file generated by Microsoft Word is suitable for this printer and all other printers of the same model. After the PostScript file is generated, DocServer sends the file to the printer specified in the Default Printer user preference.

As an administrator, you need to complete the following tasks to support server-based batch printing.

1. Identify the printer models within your enterprise that will be used for server-based batch printing.
2. For each model, select one network printer and add a printer connection to it on the DocServer machine.
3. Designate one configured printer as the default printer for the DocServer machine.
4. Provide the list of configured printers to end users, who will use this list to select a Printer Driver in User Preferences.

For example, an organization has five Xerox Model A printers, named xrx001 to xrx005, and five Canon Model B printers, named cnn001 to cnn005. A printer server named hqsrvr is used to route requests to all of the printers. The administrator decides to use xrx005 to represent the Xerox Model A printers and cnn005 to represent the Canon Model B printers, then adds printer connections on the DocServer machine for each. The xrx005 printer is chosen as the default printer. These connections are used by the DocServer component to generate PostScript files. Only one printer for each model is actually configured on the DocServer machine. After creating the printer connections, the administrator notifies the end users of the network names of the configured printers (in this case: \\hqsrvr\xrx005 and \\hqsrvr\cnn005).

Continuing the example, a user now wants the cnn003 printer for her personal batch printing requests. To do this, she goes to the User Preference Screen, Correspondence View and enters \\hqsrvr\cnn003 in the Default Printer field and \\hqsrvr\cnn005 in the Printer Driver field. All subsequent batch printing requests she submits are sent to the cnn003 printer.

If a user does not specify a User Preference, batch printing requests submitted by that user are sent to the default printer configured by the administrator on the DocServer machine.

To add a printer connection to the DocServer machine

1. Login to the DocServer machine using the same User ID used by the Windows Service running the Siebel Server.
2. Select Start > Settings > Printers.
3. Double click the Add Printer icon.
4. On the Welcome screen, click Next.
5. On the Local or Network Printer screen, select Network Printer and click Next.
6. On the Locate Your Printer screen, select Network Printer and click Next.
7. On the Default Printer screen, select either Yes or No and click Next.
8. Click Finish.

To change the default printer

1. Login to the docServer machine using the same User ID as used by the Windows Service running the Siebel Server.
2. Navigate to Start Menu > Settings > Printers.
3. In the printer list, right click on the desired printer and choose Set as Default.

Batch Printing Instructions for the End User

To batch print, you select correspondence items and then select the Print option from the applet menu. The Print menu item is active only if all selected correspondence records have a value of Completed in the Document Status column.

Initially the Print menu item on the Correspondence and Fulfillment screens is configured to perform client-based printing. However, your administrator can configure server-based printing in addition to, or instead of, client-based printing.

Using Client-Based Batch Printing

When you use client-based batch printing, the Siebel application launches Microsoft Word on your client system. It retrieves the document from the Siebel File System and prints it to the default printer configured for your desktop session. To use this feature, you need the following:

- Microsoft Word must be installed on the client system.
- Internet Explorer must be configured to launch Microsoft Word.
- The default printer must be configured for your desktop.

To configure Internet Explorer to allow client-based batch printing

1. Start Internet Explorer and log on to the Siebel application.
2. In the Internet Explorer, select Tools > Internet Options.
3. Select the Security Tab. The security zone used by Siebel applications is highlighted (either Local intranet or Trusted). Verify that any other URL in this zone can be trusted with extra security privileges.
4. Select Custom Level.
5. In the Security Settings dialog box, find "Initialize and script ActiveX controls not marked safe." Change the setting to either Enable or Prompt.
6. Click OK.
7. To the question, "Are you sure you want to change the security for this zone?" click Yes.

8. In the Internet Options dialog box, click OK.

To add a printer connection to your desktop

1. Select Start Menu > Settings > Printers.
2. Double-click the Add Printer icon.
3. Click Next on the Welcome screen.
4. On the Local or Network Printer screen, select Network Printer and click Next.
5. On the Locate Your Printer screen, select Type the Printer Name and either type the network name of the printer, or click Browse and select the printer.
6. Click Next.
7. On the Default Printer screen, choose either Yes, or No. Click Next.
8. On the Completing the Add Printer Wizard screen, click Finish.

To change the default printer

1. Select Start Menu > Settings > Printers.
2. The current default printer is marked with a check. To select a new default printer, right click on the desired printer and choose Set as Default.

To print documents using client-based printing

1. From the application-level menu, choose View > Site Map > Correspondence or Fulfillment.
2. Close any Word files.
3. Select one or more rows in the Correspondence List Applet. All selected rows must have a Document Status of Completed.
4. In the applet menu, select Print.

   The selected documents are printed to the configured default printer.

Using Server-Based Batch Printing

Server-based batch printing sends a printing request to the Siebel Document Server. The document is then sent to the printer specified in User Preferences. If you do not specify a printer, the document is printed on the default printer configured by the System Administrator.

To specify a printer for server-based batch printing

1. From the application-level menu, choose View > Site Map > User Preference > Correspondence.
2. In the Default Printer field, enter the network name of the printer used for Correspondence. The network name should contain both the printer server name and the printer name as follows:

   \\printer_server_name\printer_name
3. In the Printer Driver field, enter the name of the printer driver used to generate an intermediate file during the printing process. The System Administrator should provide you with a list of printer drivers and their associated printer types. Select the Printer Driver associated with the printer you previously specified in Step 2.
4. Click Save.

To print documents using server-based printing

1. From the application-level menu, choose View > Site Map > Correspondence or Fulfillment.
2. Select one or more rows in the Correspondence List Applet. All selected rows must have a Document Status of Completed.
3. In the applet menu, select Print.

   The selected documents are printed to the default printer specified in User Preferences.

Presentations 15

Siebel Presentations allows your sales representatives to create presentations (and other types of documents) based on templates that you create in Microsoft PowerPoint.

Traditionally, salespeople create presentations by starting with a presentation that worked in the past and then modifying it for the current prospect. Salespeople must not only change such basic information as the customer's name, but also possibly restructure the presentation so that it fits this new prospect's unique needs. For example, the original presentation may have been focused on price, whereas the new prospect is more concerned with other decision criteria, such as speed or extra functionality.

With Siebel Presentations, once the presentation administrator has created the right templates, the salesperson can click one button to build the correct presentation for a specific account or opportunity. Siebel Presentations uses information that salespersons have entered in the early stages of an opportunity to create the presentation.

Salespeople can add deal-specific information to the presentation without worrying about formatting or presentation. Using the Presentation Library, salespeople can find any additional information and automatically insert it into the presentation.

System Requirements for the Siebel Web Client

To use Siebel Presentations, you must have:

- All of the components that are required to run Siebel 7.5, including a Siebel Server and a Web Server
- The Document Server installed on one or more Windows machines
- Microsoft Office

NOTE: If you are deploying the Siebel Server in UNIX and want to use Presentations, a separate Windows machine is required for the Document Server.

Siebel Presentations uses the Document Server, which is a component of the Siebel Server which lets users on the Web work with Word, and PowerPoint documents on the server.

For more information on installing the components required to use Siebel 7.5 software, see *Siebel Server Installation Guide* for the operating system you are using.

Your employees or partners who use Siebel Presentations need:

- A Web browser to use the product
- Optionally, Microsoft Office to edit documents

For information on the Web browsers that are supported by Siebel applications, see *Siebel System Requirements and Supported Platforms*.

System Requirements for the Siebel Remote Web Client

Siebel Presentations is available for the Siebel Remote Web Client as well as for the Siebel Web Client. The user interface for Presentations is identical in the Siebel Remote Web Client and the Siebel Web Client.

However the Siebel Remote Web Client processes requests to generate documents locally, so field sales representatives can generate correspondences, proposals, and presentations when they are out of the office.

To run Siebel Presentations on the Siebel Remote Web Client, you must have Microsoft Office installed on the same machine as the Siebel Remote Web Client.

Setting Up the Document Server

Siebel Correspondence, Siebel Presentations, and Siebel Proposals all use the Siebel Document Server to generate Microsoft Word and Microsoft PowerPoint documents through the Web.

After installing your Siebel applications, you have to enable the Document Server.

For more information, see "Installing the Document Server" on page 305.

The Process of Creating Templates

To create templates, you go through the following stages (shown in Figure 15):

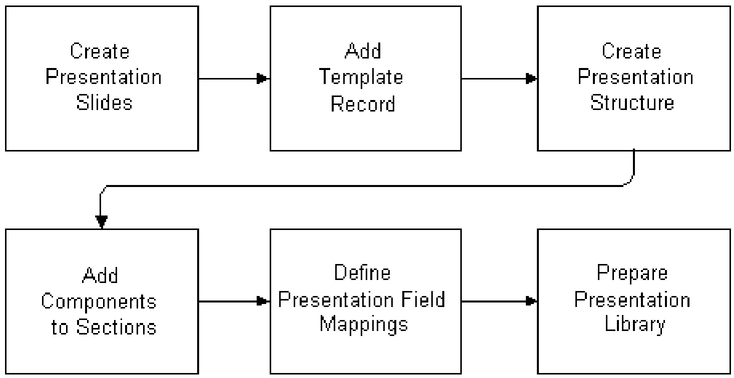


Figure 15. Siebel Presentation Process Flow

- **Create Microsoft PowerPoint slides.** To create the slides needed by the template, you must write their content and insert bookmarks for such variables as company, contact name, address.
- **Add a template record.** Use your Siebel application to create a single record for the template.
- **Create the presentation structure.** Specify which sections the presentation should contain.
- **Add components to the sections.** Specify which components each section should contain.
- **Use conditions in sections or components.** Optionally, you can add conditions to specify that sections or components are included in the presentation only under certain circumstances.
- **Define presentation field mappings.** Specify which Siebel objects correspond to each bookmark in your PowerPoint component slides. You also specify the name of this mapping in the template record.
- **Prepare the Presentation Library.** In this optional step, which can be done at any time, you create a separate library of slides that salespeople can draw upon to customize their presentations.

Creating Template Slides in Microsoft PowerPoint

The first step is to create slides in Microsoft PowerPoint. These slides consist of one style slide and multiple component slides, as shown in Figure 16.

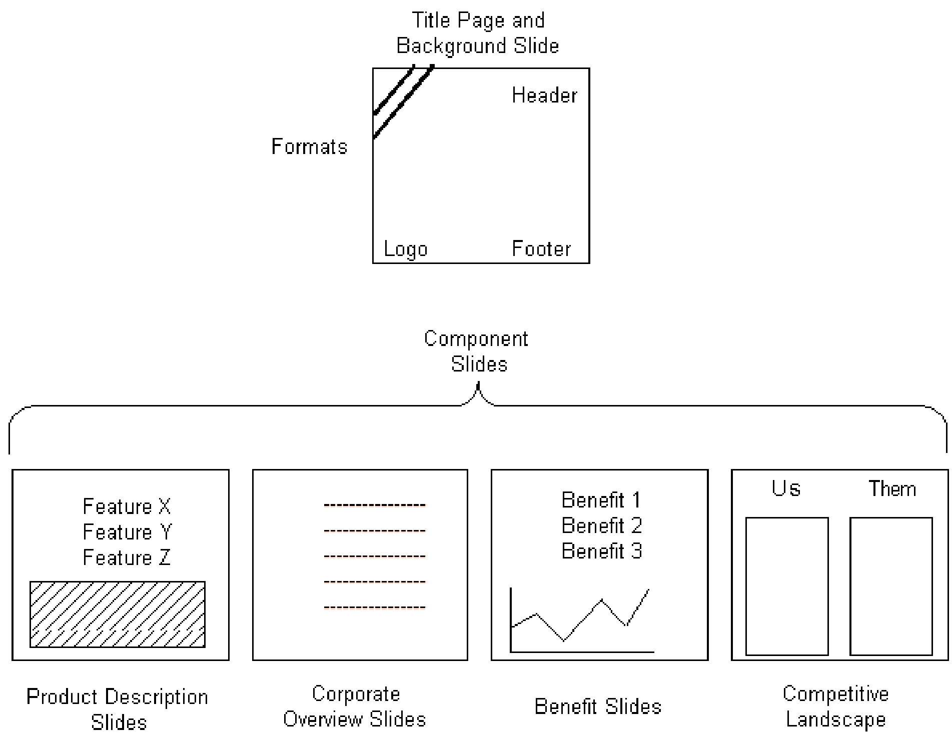


Figure 16. PowerPoint Slides That Can Make Up a Presentation Template

The components shown in Figure 16 on page 345 are only examples. You could have other components, such as a table of contents or a set of collateral, and you could omit the quotes or product descriptions. However, a template must have a presentation background slide and one or more component slides.

NOTE: See *Release Notes* for information about which versions of Microsoft PowerPoint are supported.

NOTE: Presentations can only use fields from one business object. If you want to include additional fields, you must use Siebel Tools to add the Business Components that include these fields to the Business Object that is the basis of the presentation.

To create the template slides, you go through the following stages:

- **Planning the template.** Decide what components the template should have.
- **Creating the style slide.** Create the slide that gives all the template components a standard formatting.
- **Creating the component slides.** Create a slide for each component of the template.

Planning the Template

Before you create the slides in PowerPoint, you must determine how the presentation should look and what type of information it should contain. Begin by looking at previous successful presentations to see what sections they contained. For example, did they all contain an agenda, a executive overview slide, and a product summary slide? Next, look to see what current slides you have on hand, and what customer questions these pieces answer. Then decide how to organize your information. What topics could be standard across all presentations? What topics are specific to certain presentations? What is the best order for the pieces in the presentation you are creating? Finally, decide what fields to insert to customize their presentations (for example, contact name, account name, industry). You will use this information to create bookmarks in your PowerPoint slides.

Creating a Presentation Background Slide

After you plan your templates, work on the presentation background slide for this template, which is the slide that serves as your title slide and also specifies the background layout and formatting of the entire presentation. This background slide may contain your company logo, special colors and background designs, and headers and footers.

To set up styles for your template

1. Create a new slide in Microsoft PowerPoint.
2. Since this slide will also serve as your title slide, you may want to select the title slide layout template and enter the title of the presentation.
3. Select the background colors and font size.
4. Choose View > Header and Footer, and create and apply a header and a footer for your template.
5. Switch to the Master Slide view, and select formatting options that will apply to your whole presentation.
6. Close the Master Slide view, and return to the Slide view (choose View > Slide).
7. Save the file:
   - Choose a name that uses only alphanumeric characters.
   - Use the .ppt extension for PowerPoint.
8. Close the file.

Creating Components

The next step in developing your template is to create components, the slides that make up the body of your presentation.

A *component* is the Siebel Presentations term for a Microsoft PowerPoint that includes standard text and personalized data.

To create a component, you type the standard text and then create *bookmarks*, or Microsoft PowerPoint placeholders for custom data. When a salesperson generates a presentation, these bookmarks will be replaced with data from the Siebel application.

To create a component with bookmarks

NOTE: This procedure may vary slightly, depending on your version of Microsoft Word.

---

1. Create a new slide in Microsoft PowerPoint.
2. Type the standard text, pictures, bulleted information, and so on that belongs in this component.
3. Place the cursor where you want to create a bookmark.
4. Enter the following text:

   `[[“name of bookmark”]]`

   For example, to create a bookmark for the company name, type:

   `[[Company]]`

5. Write down the name of the bookmark, because you will need it later when you map the bookmark to a Siebel field names.
6. Repeat Step 3 through Step 5 for every bookmark you want to insert.

   NOTE: If the same field is being inserted in several places, you can copy its bookmark and paste it into other parts of the document.

   ---

7. Save the component slide as a .ppt file.

Creating a Record for the Template

After you have created your template slides in PowerPoint, you can use Siebel Presentations to specify how they are assembled in the template.

To create a record for the template

1. From the application-level menu, choose View > Site Map > Document Administration > Presentation Templates.
2. In the Templates list, add a new record and complete the fields.

   Some fields are described in the following table.

Field	Comment
Name	Enter a name for the template.
Default	If you want this template to be the default presentation template, place a check mark in the Default field. When the user clicks Auto Presentation, Siebel Presentations uses the default template if there are no decision issues that match the theme of a presentation. You can only select one Opportunity Presentation default and one Account Presentation default.
Category	Select one of the following types of templates: ■ Opportunity Presentation templates are available only when you are working with Opportunities. ■ Account Presentation templates are available only when you are working with Accounts.
Mapping Name	Used to indicate the group of bookmark fields to be used with this template. You can leave this field blank for now, until you create a mapping.
Template File Name	Attach the template file.

Field	Comment
Theme	If you want to associate the template with a particular decision issue, click the Decision Issue list in the Theme field, and select a theme from the Decision Issue dialog box. When you give your presentation template a theme, you associate it with a particular decision issue that is important for your opportunity. When a presentation theme matches the number one decision issue for the current opportunity, Siebel Presentations automatically selects the correct template when the user clicks Auto Presentation. Users can also select a theme template if they want. Because accounts do not relate to decision issues, the Theme field is not applicable for Account Presentation templates. It only applies to Opportunity Presentation templates.
Description	Enter a description of the template.

About Creating the Template Structure

Once you have created your PowerPoint slides and a record for your template, define the structure of your presentation template.

A presentation is made up of *sections*, which divide and subdivide your presentation. Depending on your needs, a single section might contain multiple components or a single component.

The type of a section depends on what type of data it contains. For example, file sections contain slides, chart sections reference Siebel charts, and so on.

Defining Template Sections

You define the structure of the presentation template by creating sections in the Presentation Template Administration view, which are associated with the Template record you created for this template. You must create top-level sections, and you can add subsections to these top-level sections. Your presentation structure can have multiple levels of sections, since a subsection can contain other subsections.

Creating Top-Level Sections

First, you must create top-level sections.

To create top-level sections

1. From the application-level menu, choose View > Site Map > Document Administration > Presentation Templates.
2. In the Template Explorer, in the left frame, click the + icon next to the icon representing this template.

   The Sections folder appears in the list.
3. In the Explorer list, click the + icon next to the Sections folder.

   The Sections list appears in the right frame.
4. In the Sections list, add a new record.
5. In the Name field, enter a name for this section.

   The Section name is the title of the slide for some types, such as Bullet Slide.
6. In the Sequence field, specify the order in which this section should appear in the presentation.

7 In the Section Type field, indicate the type of section you are creating. The following table describes the different section types available to you.

Type	Comments
File	Contains only presentation slides or text. If you are using PowerPoint, they must be in PPT, DOC, or TXT format. If you indicate text, it creates a slide and inserts the text.
Chart	Creates a slide and inserts a Siebel chart. The chart is automatically centered, and you can change x, y, and z axes.
Bullet Slide	Creates a slide and inserts a list of Siebel data in bullet format—for example, a list of products the opportunity is interested in. This section name is used as the slide title.
Locator	Pulls in slides or text (PPT slides or TXT files) from the Siebel Encyclopedia. For example, if you create a locator section, Siebel Presentations can dynamically pull in slides from the marketing encyclopedia that relate to the products the opportunity is interested in. For example, if you want the presentation to dynamically insert slides related to the products on the opportunity, use a Locator. The file types must be PPT, TXT, or RTF. If more than one marketing slide meets the Locator criteria you specify, Siebel Presentations inserts each.
Organization Chart	Creates a slide and pulls in Organization charts for the Account or Opportunity associated with the template. Charts are automatically centered.
Table	Creates a slide and pulls Siebel data into a table format. You select fields to be included, the sequence of the fields, and the column length. Tables are automatically centered. By selecting a Table Section, you also enable creation of a Related Table section. See "Adding Related Table Subsections" on page 359.
Two-column Slide	Creates a slide that puts two sections next to each other. You can, for example, show a list of key features of a product (a Bullet Slide section) next to a picture of the product (a File section). You specify the two subsections, which can be any of the other section types.

8 Complete the fields applicable to your section type. Table 26 on page 355 describes the fields that you should complete for each type of section.

9 Repeat Step 4 on page 352 through Step 8 to add all the top-level sections that are needed.

Table 26. Selected Fields for the Presentation Template Administration View

Section Type	Field	Comments
Bullet Slide	Business Object	The Siebel business object from which the information is taken. Select from the list, which contains all available business objects from your repository, or enter the name in the field. For example, to include a Bullet List of products offered with the quantity and ship date for the opportunity, the business object is Opportunity.
File	N/A	You do not need to complete any fields for this type of section.
Chart	Business Object	The Siebel business object the chart information is coming from (for example, Opportunity). Select from the Business Object list, which lists all available business objects from your repository, or enter the name in the field.
	Chart or Table Name	The name of the chart applet you want to insert into this section (for example, "Opportunity Chart Applet - Current Opportunity Analysis"). The list also contains all available applets from your repository.
	Search Spec	Any search criteria you want to use to restrict data for the chart (for example, Revenue > 500000).
	Category	With charts that contain multiple X-axis options, this field allows you to set which option to use for the X-axis. For example, in the Lead Analysis by Rep chart, the X-axis can be Sales Representative or Quality.
	Function	With charts that contain multiple Y-axis options, this field allows you to set which option to use for the Y-axis. For example, in the Lead Analysis by Rep chart, the Y-axis can be Number of Opportunities, Opportunity Revenue, or Average Opportunity Revenue.
	Series	This field allows you to set the Z-axis you wish to use for charts that contain multiple Z-axis options.

Table 26. Selected Fields for the Presentation Template Administration View

Section Type	Field	Comments
Locator	Information Retrieval Method	Select which relationship to use to find the literature (for example, Oppty Competitor, which are the slides on competitors associated with the opportunity). To associate literature with a product, competitor, or partner, use the Literature Administration view (or the Decision Issue, Competitor, or Product Administration views). See Chapter 17, “Literature” for more information.
	Retrieved Literature Category	Indicate what type of literature you are looking for (for example, brochures, specification sheets, and so on). This helps you to filter out the slides from the rest of the documents in the marketing encyclopedia, to be included in your presentation.
Organization Chart	Business Object	The Siebel object from which the information is taken. Select from the picklist, which contains all available business objects from your repository, or enter the name in the field.
	Chart or Table Name	The name of the applet that contains the organization chart data (for example, the Opportunity Organization Analysis applet).

Table 26. Selected Fields for the Presentation Template Administration View

Section Type	Field	Comments
Table	Business Object	This is the Siebel business object from which the information is taken. Select from the list, which contains all available business objects from your repository, or enter the name in the field. For example, if you want to include a table of products being offered, with the quantity and ship date for the opportunity, the business object is Opportunity.
	Chart or Table Name	The name of the applet where the table data is stored. In the example used for Business Object, the applet is Opportunity Product Applet.
	Width	Width represents a percentage of the space available between the template margins. If you choose 100, that equates to 100% of the space between the Template margins. If you enter 125, that represents 125% of the space between the borders. If left blank, the width of the columns in the table is based on pixels.
	Table Fields	Click the ellipsis button to bring up the Table Fields dialog box; then, for each field you want in the table, click New and enter the following information: ■ The Field Name of the field; for example, Product. ■ The Sequence in which you want the field listed. ■ The Width of the column; the default (and minimum) width is 100 pixels. A second way to define column width is by percentage of the table width. When a value is entered into table width, column width equates to percentage of total table width. For example, if there are three fields and table width is set to 100, field widths of 25, 65, and 35 would equate to 25%, 65%, and 35% of the total width of the table. In this example, if the table width was not set, the field widths would equate to 25, 65, and 35 pixels. ■ The Alignment of the data in the field: Left, Center, Right.

Table 26. Selected Fields for the Presentation Template Administration View

Section Type	Field	Comments
Two-Column Slide	N/A	Create two subsections under the section you have designated as Two-Column Slide. For each subsection, complete the fields appropriate to that type of section. For example, if you want to show a Chart section next to a Table section, create a subsection of the Chart section type (and complete the Chart-related fields shown in this table) and create a subsection of the Table type (and complete the Table-related fields shown in this table).

Adding Subsections

After adding top-level sections, you may want to add subsections to one or more of them.

To add subsections to an existing section

1. From the application-level menu, choose View > Site Map > Document Administration > Presentation Templates.
2. In the Template Explorer, in the left frame, click the + icon next to the template to which you want to add a subsection.

   The template's Sections folder appears.
3. In the Template Explorer, click the + icon next to the Sections folder for this template.

   The Explorer displays the sections for this template, and the Sections list is displayed to the right.
4. In the Template Explorer, click the + icon next to the section to which you want to add a subsection.

   The Sections and Components folders appear for this template.
5. Click the + icon next to the Sections folder for this section.

   The Sections list appears, listing all subsections under this section.
6. Use the Sections list to add a subsection in the same way you used it to add a top-level section, as described in "Creating Top-Level Sections" on page 352.

NOTE: When a presentation generates, a section generates before any of its subsections and is displayed prior to a subsection in the finished presentation.

Adding Related Table Subsections

After adding a Table Name subsection, you can add related tables that provide detailed information for the first table. For example, if the tables subsection contains a quote record, the related table can contain the quote line items. The relationship between the information is essentially a *parent-child-grandchild* relationship; the opportunity is the *parent* record, the quote table is the *child*, and the related table containing the quote line items is the *grandchild*.

To add a related table

1. From the application-level menu, choose View > Site Map > Document Administration > Presentation Templates.
2. In the Template Explorer list, in the left frame, click the + icon next to the template to which you want to add a related table.

   The Sections folder appears in the list.
3. In the Explorer list, click the + icon next to the Sections folder.

   The sections list appears in the right frame.
4. In the Sections list, add a new section or edit an existing section.
5. In the Section Type field, select Table and enter the Table Name.
6. Complete all necessary fields.
7. In the Explorer list, click the + icon next to the Related Tables folder.

   NOTE: The Related Table folder in the Template Explorer is used only for the Table section type. This folder can be edited only if a table is already added.
8. In the Related Tables dialog box, complete the fields as described in the following table.

Field	Comments
Business Object	Select the Siebel object to which this table is related.
Table Name	Select the name of the related table applet.
Field Name	Select the fields that will be displayed in this table. If none are selected, all fields appear.

Adding Components to Template Sections

Now that you have defined the structure of your document, you must specify the location of the component slides that will probably make up the bulk of your presentation.

For sections that draw upon data from a Siebel database (such as Chart and Report), you have specified all the information necessary for Siebel Presentations to generate the appropriate contents. However, the component documents, which you created earlier in PowerPoint, are not part of the presentation until you add them to the appropriate sections.

NOTE: Components can be added to any kind of section (not just a File section), and a section can contain multiple components.

Components can be PPT or DOC, TXT, or RTF files. When they are not PPT files, Siebel Presentations creates a slide (with your template background) and imports the text into the slide. PowerPoint inserts the .txt and .doc files based on how you have formatted the documents. For example, PowerPoint inserts TXT or DOC paragraphs in the slide as paragraphs, but if your file contains TXT or DOC indented or bulleted paragraphs, PowerPoint attempts to create a slide for each bullet point, or one slide for all bullet points, depending on the formatting and carriage returns in your document.

To make sure that TXT or DOC files are inserted correctly in your PowerPoint presentation, open the text or PowerPoint document itself in PowerPoint and verify that the format is correct. The format you see when you open the file in PowerPoint will be the same format Siebel applications use in the presentation.

To add a component to a presentation template

1. From the application-level menu, choose View > Site Map > Document Administration > Presentation Templates.
2. In the Templates Explorer, in the left frame, select the template to which you want to add a component.

   The Sections and Components folders appear for the template.
3. Click the + icon for the Components folder.

   The Components list appears on the right.

4. In the Component list, add a new record.

   The Add Sales Tools dialog box appears.

5. In the Add Sales Tools dialog box, perform one of the following actions:

   - Select the component you want to add and click Add.
   - If your component does not appear in the dialog box, click New.

     Enter the component fields, as described below.

6. When the component appears in the Components list, click the Edit button.

7. Complete the component fields (described in the following table), and click Save.

Field	Comments
Name	Enter a name for the component.
Sequence	Specify the order in which this component should appear in the section.
Attachment Name	This field was filled in automatically when you selected a file from the Add Sales Tool dialog box.
Condition	Enter a condition and this component will be displayed only when the condition is true.

Using Conditions in Templates

You can add query conditions to a section or a component to specify the conditions under which the section or component will be used in the presentation. For example, if you have two executive summaries—one for deals of over $100,000 and another for smaller deals—you can use the condition field in each Executive Summary section to allow Siebel Presentations to insert the appropriate executive summary based on which condition is true.

Entering Criteria

You can enter query criteria in a section or component record's Condition field (such as [Revenue] > 100000). If the condition is TRUE, the section or component is included. If the condition is FALSE, the section of component is not included.

If you do not specify a condition, the section or component is always used.

You can create conditions for any field that relates to the business object of your presentation; use Opportunity fields for opportunity presentations, and Account fields for account presentations. If the definition of a condition needs to be based on fields from another business object, then you must add those fields to the Opportunity or Account business object through either a link or a join. The syntax for conditions is similar to the syntax for Siebel queries. For more information about the syntax of Siebel queries, see *Fundamentals* and *Siebel Tools Reference*.

Examples of Criteria

The following examples illustrate the syntax for conditions:

- If the opportunity is for a Pentium computer, you want to insert a component about the advantages of the Pentium chip. In the Condition field for this component, type the following condition:

  ```
  EXISTS [Product] LIKE "Pentium*"
  ```

  This condition would look at the products listed for the opportunity. If the product name begins with Pentium, Siebel Presentations would insert the component. Otherwise, Siebel Presentations would leave out this component.

  NOTE: To use a product in a condition, the product must have entered using the Products view of the Opportunity screen. The condition will not work with products that were entered as Quote line items.

- If the account is located in Georgia, you want to enter a section with terms and conditions limited to that state. In the section's Condition field, you would enter the following:

  ```
  EXISTS ([State] = "GA")
  ```

  or

  ```
  [State] = "GA"
  ```

  You would use the first line if the account is located only in GA, and the second line if the account is located in GA and another location.

  This condition will look at the state for the account, and if the state is GA then the section would be included in the presentation; otherwise, Siebel Presentations would skip this section and move on to the next.

- If the opportunity has a revenue amount greater than $1,000,000 and it is expected to close this year, you want to insert a component on a special program for this type of customer. Enter the following condition in the Condition field for the component:

  ```
  [Revenue] > 1000000 AND [Close Date] <= ("12/31/02") AND [Close
  Date] >= ("1/1/02")
  ```

After you enter a condition, test it as a query on the view you are going to use it on. For example, the above example involving Revenue and Close Date can be tested as a query on the My Opportunities view. If the query returns the data you expect, the query is probably in the correct format for your condition field.

Defining Presentation Field Mappings

When you created the component slides of your presentation, you probably included bookmarks for personalized fields. You must map the bookmarks in the template's components to Siebel fields.

This mapping tells Siebel Presentations which Siebel field to use for substituting data for a particular bookmark in your presentation template. For example, by mapping the bookmark Company to the Account field, you tell Siebel Presentations to replace each Company bookmark with the value of the Account field.

You cannot map fields to a bookmark in the template's header or footer, unless that bookmark is also somewhere else in the content of the template, other than in the footer or header.

Since you may be working with multiple presentation templates, you can have multiple sets of bookmarks. You could have one mapping for one presentation template and another mapping for another presentation, or you could use a single mapping for several presentation templates. In either case, you must specify a mapping name in your template record to associate the template with a specific mapping.

If you map a bookmark to multi-value field, the primary record of the group is retrieved. If you want to retrieve multiple values from a multi-value field, you can add a Table section to the document template. This section type will retrieve multiple values from the multi-value field in table format.

To map the bookmarks in a template's components to fields, you must:

- Create a mapping
- Associate a template with the mapping

Creating a Mapping

To create a field mapping, first create a record for the mapping, and then map the fields.

To create a record for a mapping

1. From the application-level menu, choose View > Site Map > Document Administration > Presentation Field Mappings.

   The Business Objects view appears.

2. In the Business Objects list, add a new record.
3. Complete the fields (described in the following table).

Field	Comments
Mapping Name	Enter a name for the mapping.
Business Object	Click the select button in the Business Object field, and use the dialog box that appears to select the business object that contains fields used in the presentation, and then click OK. For example, if you are creating an opportunity presentation, select Opportunity in the Business Object field.
Description	Enter a description of the mapping for your own use.

4. In the Business Objects Explorer, in the left frame, click the + icon next to the business object for which you created a mapping.
5. Select the Business Components folder.
6. In the Business Component list, add a new record and complete the fields.

NOTE: You can associate more than one Business Component mapping with an Object. For example, if you are creating an opportunity presentation, you would select the Opportunity Business Component. You could also select the TAS Account Business Component to create mappings for views under the Opportunity TAS view.

To map the fields

1. Navigate to the business component that contains the fields to be mapped.
2. Click the + icon next to the Business Component name.

   The Business Component Fields folder appears.
3. Click the + icon next to the Business Component Fields icon.

   The Business Component Fields list appears.
4. In the Business Component Fields list, add a new record and complete the fields.
5. Complete the fields and click Save.
6. Repeat Step 4 and Step 5 for each field that needs to be mapped.

Associating a Mapping with a Template

After you have created a mapping, you must associate it with a template to make it apply to all the components in that template. You can associate a mapping with one or more templates.

To associate a mapping with a template

1. From the application-level menu, choose View > Site Map > Document Administration > Presentation Templates.
2. In the Templates list, select the template record with which you want to associate the mapping.
3. In the Mapping Name field, select the mapping you created earlier.

Creating the Presentation Library

As a presentation administrator, you create and maintain the Presentation Library, which consists of slides that sales representatives can add to their presentations.

Slides in the Presentation Library are different from the other components you created earlier, because components are part of the presentation template, which are automatically included in presentations generated from that template. Slides in the Presentation Library are available to sales representatives only on an as-needed basis. As an administrator, you can also recommend documents to include in the templates.

After sales representatives create a default presentation automatically, they can add more slides from the Library or use the Edit Layout command to customize the presentation. The Presentation Library allows multiple presentations created from the same template to have different contents.

As an administrator, you place the various components in the Library and maintain the information. When the sales representatives need additional slides to add to a presentation, they review the Library, select the component they want to insert, and automatically insert it into the presentation.

The sales force cannot update the information in the Library. The only sections and components available to sales representatives are those you provide for them.

To prepare the presentation library, you must:

- Create Microsoft PowerPoint files for the library
- Add sections for the presentation library
- Add components to the library sections
- Recommend documents to be included in templates

Creating Presentation Files for the Library

You create presentation files for the library in the same way that you create the presentation templates themselves. Use Microsoft PowerPoint to enter text, graphics, and bookmarks, and then map these bookmarks to fields in your Siebel database.

NOTE: The only type of component that can be included in the Presentation Library is of the File section type. Other section types (Charts, Reports, and so on) can be included only in the initial template.

Adding Sections to the Presentation Library

Sections are used to organize slides in the Presentation Library. For example, if some of the slides in the library are marketing pieces and others are technical, you may want to create a section for each of these. Then the users will be able to browse through the marketing pieces and through the technical pieces separately. You must add at least one section to the Presentation Library. For more information about creating presentation sections, see "Defining Template Sections" on page 352.

To add sections to the Document Library

1. From the application-level menu, choose View > Site Map > Document Administration > Presentation Library.
2. In the Library Explorer, in the left frame, click the + icon of Presentation Library folder.

   The Sections folder appears under the Library.

3. Add the sections to this folder that you added sections for the presentation.

Adding Components to the Presentation Library

After adding sections to the presentation library, you add components to them.

For more information about adding presentation components, see "Adding Components to Template Sections" on page 361.

To add components to the Presentation Library

1. From the application-level menu, choose View > Site Map > Document Administration > Presentation Library.
2. Use the Library Explorer to navigate to the section to which you want to add a component.
3. Add the component to the library just as you would add a component to a presentation.

Recommending Content for a Presentation

As the administrator, you can simplify the process of creating a quick presentation by associating recommended content with the presentation template.

To associate recommended content with a presentation

1. From the application-level menu, choose View > Site Map > Document Administration > Presentation Library.
2. Use the Library Explorer to navigate to the section to which you want to add recommended content.
3. Open the selected section folder.
4. Click on the + icon of the Components folder.
5. Select a component.
6. In the Components record, click on the Recommended Templates field.
7. Add a Recommended Template to the Component record. You can recommend a component to one template or to many templates. For example, a legal clause might be required in all templates.
8. Repeat Step 5, Step 6, and Step 7 for each component that needs recommended content.

NOTE: Recommended templates are displayed when a Presentation is edited using the Edit Layout command and the Show Recommended Only box is clicked on. See "Allowing Users to Quickly Customize Presentations."

Allowing Users to Quickly Customize Presentations

The end user can quickly select and modify the contents and section sequence of a presentation so that the presentation reflects the immediate sales needs of the situation. Presentations can be customized and created by the end user, and then quickly restructured and recreated to reflect a new situation.

To create a quick, customized presentation

1. From the application-level menu, choose View > Site Map > Opportunities.
2. Select an existing opportunity or create a new opportunity.
3. Click the Presentations tab.
4. Click the Auto Presentation button.

   The template associated with the decision issue appears.

5. Click the Edit Layout button.

   The dialog box displays two columns:

   - The Contents library lists the components in the Presentation Library that can be included in the presentation.
   - The Table of Contents column lists the components in the Presentation Library that are selected for the presentation and the order in which they will be displayed.

6 In the Contents column, use the directional buttons to move selected sections from the Contents column into the Sections column. If you make a mistake, click Reset Layout to undo all changes to the Table of Contents column.

NOTE: If the Show Recommended Only box is checked, only those components recommended by the Administrator are displayed. If this box is not checked, all available components are displayed. For more information, see "Allowing Users to Display Presentations in HTML Format" on page 374.

7 In the Sections column, use the directional buttons to move a selected section to the desired sequence order. Use the X button to completely remove a section from the presentation.

NOTE: The Section column displays only top-level sections. User modifications to subsections must be done through the Presentation Table of Contents.

Allowing Users to Display Presentations in HTML Format

By default, presentations is only saved in document format, and not in HTML format. The user's View HTML button is unavailable, and the user cannot view the presentations in HTML format.

To let the user display presentations in HTML format, you must edit the parameter DocumentServerViewHTML to give it the value True instead of False.

NOTE: Users of the Remote Client cannot view presentations in HTML format.

To allow users to display presentations in HTML format

1. Start the Server Manager.
2. Enter the command:

```
Srvrmgr> change param DocumentServerViewHTML=True for comp
DocServer
```

NOTE: While this procedure uses the Server Manager, parameters can also be changed using the Server Administration interface. For more information, see *Siebel Server Administration Guide*.

Sample Templates

Siebel eBusiness Applications come with a sample database. The Document Template Administration view includes several sample document templates.

These sample presentations can be used as a reference when defining your own presentation template. In this sample database you will find the following Siebel Presentations sample presentations:

- Corporate Presentation (Opportunity category)
- Corporate Presentation - Account (Account category)

Proposals 16

Siebel Proposals allows your sales representatives to create proposals (and other types of documents) based on templates that you create in Microsoft Word.

Traditionally, sales representatives create proposals by starting with a proposal that worked in the past and then modifying it for the current prospect. Sales representatives must not only change such basic information as the customer's name, but also possibly restructure the proposal so that it fits the new prospect's unique needs. For example, the original proposal may have been focused on price, whereas the new prospect is more concerned with other decision criteria, such as speed or extra functionality.

With Siebel Proposals, after the proposal administrator has created the right templates, the sales representative can click one button to build the correct proposal for a specific account or opportunity. Siebel Proposals uses information that sales representatives have entered in the early stages of an opportunity to create the proposal.

Sales representatives can add deal-specific information to the proposal without worrying about formatting or presentation. Using the Proposal Library, sales representatives can find any additional information and automatically insert it into the proposal.

NOTE: The Siebel proposal document engine is also used to create agreement documents. Administrators who create the agreement templates can follow the steps in this chapter for creating proposals. Users are then able to select the agreement template and generate an agreement document.

System Requirements for the Siebel Web Client

To use Siebel Proposals, you must have:

- All the components that are required to run Siebel 7.5, including a Siebel Server and a Web Server
- The Document Server installed on one or more Windows machines
- Microsoft Office installed on the Document Server machine

NOTE: If you are deploying the Siebel Server in UNIX and want to use Siebel Proposals, a separate Windows machine is required for the Document Server.

Siebel Proposals uses the Document Server, which is a new component of the Siebel Server that lets users on the Web work with Word documents that are on the server.

Your employees or partners who use Siebel Proposals need:

- A Web browser to use the product
- Optionally, Microsoft Office to edit documents

For information on the Web browsers that are supported by Siebel applications, see *Siebel System Requirements and Supported Platforms*.

System Requirements for the Siebel Remote Web Client

Siebel Proposals is available for the Siebel Remote Web Client as well as for the Siebel Web Client. The user interface for Proposals is identical in the Siebel Remote Web Client and the Web Client.

However, the Siebel Remote Web Client processes requests to generate documents locally, so that field sales representatives can generate correspondences, proposals, and presentations while traveling.

To run Siebel Proposals on the Remote Web client, you must have Microsoft Office installed on the same machine as the Remote Web Client.

Setting Up the Document Server

Siebel Correspondence, Siebel Presentations, and Siebel Proposals all use the Siebel Document Server to generate Microsoft Word and Microsoft PowerPoint documents through the Web.

After installing your Siebel applications, you must enable the Document Server.

For more information, see "Installing the Document Server" on page 305.

The Process of Creating Templates

To create templates, you perform the tasks shown in Figure 17.

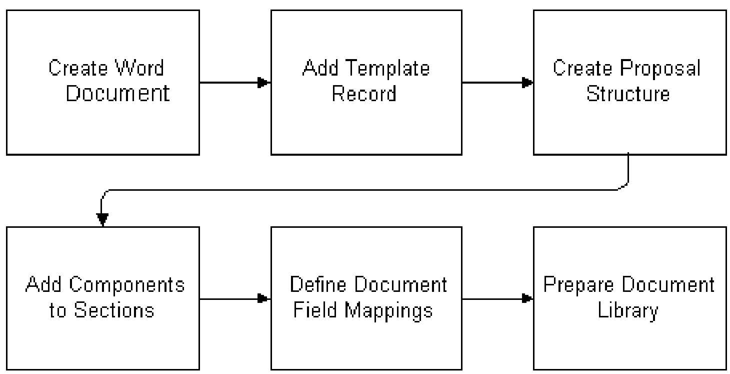


Figure 17. Siebel Proposal Process Flow

- **Create Microsoft Word documents.** To create the documents needed by the template, you must write the text and insert bookmarks for such variables as company, contact name, and address.
- **Add a template record.** Use your Siebel application to create a single record for the template.
- **Create the proposal structure.** Specify which sections the proposal should contain.
- **Add components to the sections.** Specify which components each section should contain.

- **Use conditions in sections or components.** Optionally, you can add conditions to specify that sections or components are included in the proposal only under certain circumstances.
- **Define document field mappings.** Specify which Siebel objects correspond to each bookmark in your Word component documents. You also specify the name of this mapping in the template record.
- **Prepare the Proposal Library.** In this optional step, which can be performed at any time, you create a separate library of documents that sales representatives can draw upon to customize their proposals.

Creating Template Documents in Microsoft Word

The first step is to create documents in Microsoft Word. These documents consist of one style document and multiple component documents, as shown in Figure 18.

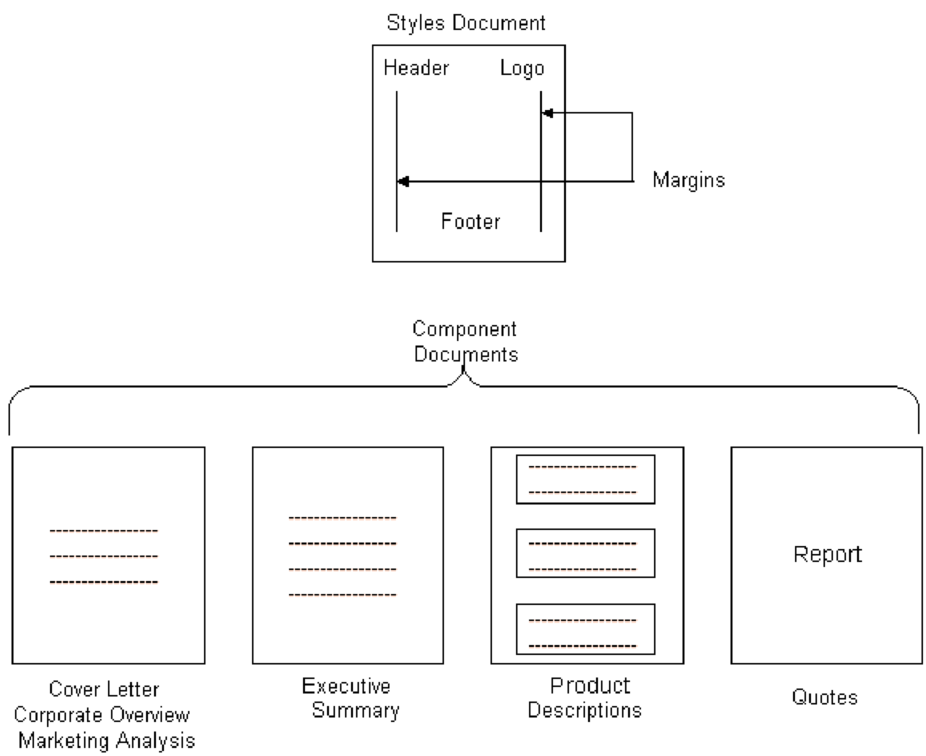


Figure 18. Word Documents That Can Make Up a Proposal Template

The components shown in Figure 18 are only examples. You could have other components, such as a table of contents or a set of collateral, and you could omit the quotes or product descriptions, for example. However, a template must have a style document and one or more component documents.

NOTE: See *Release Notes* for information about which versions of Microsoft Word are supported.

To create the template documents, you perform the following tasks:

- **Planning the template.** Decide what components the template should have.
- **Creating the style document.** Create the document that gives all the template's components a standard format.
- **Creating the component documents.** Create a document for each component of the template.

Planning the Template

Before you create the documents in Word, you must determine how the proposal should look and what type of information it should contain.

Begin by looking at previous successful proposals to see what sections they included. For example, did they all have a cover letter, an executive summary, and a quote? Also, look at the documents your company currently has on hand, and the customer questions these pieces answer. Then decide how to organize your information. What topics could be standard across all proposals? What topics are specific to certain proposals? What is the best order for the pieces in the proposal you are creating? Finally, decide what fields to insert to customize their proposals (for example, contact name, account name, and industry). You will use this information to create bookmarks in your Word documents.

As part of your planning, you should look at the sample templates that come with Siebel Proposals, which are described in "Sample Data: Field Mappings and Templates" on page 413.

NOTE: Proposals use fields from only one business object. If you want to include additional fields, you must use Siebel Tools to add the business components that include these fields to the business object that is the basis of the proposal.

Creating a Styles Document

After you plan your templates, you work on the styles document for this template. This Word document will define the layout of your proposal and may include such things as headers, footers, your logo, and special margins.

The layout options you specify will automatically be applied to all the components used in the proposal.

NOTE: Do not type any content into this document. The content will come from the individual component documents that you will create later.

To set up styles for your template

1. Create a new document in Microsoft Word.
2. Set up margins, headers, footers, fonts, and other layout options for your template.
3. When you are finished creating styles, save the file:
   - Choose a name that uses only alphanumeric characters.
   - Use the .doc extension for Microsoft Word.
4. Close the file.

Creating Components

The next step in developing your template is to create components, which are the text pieces that make up the body of your proposal.

A component is a Microsoft Word document that includes standard text and personalized data. For example, a cover letter component includes your standard cover-letter text and personalized data such as the name and address of the contact to whom the letter is addressed.

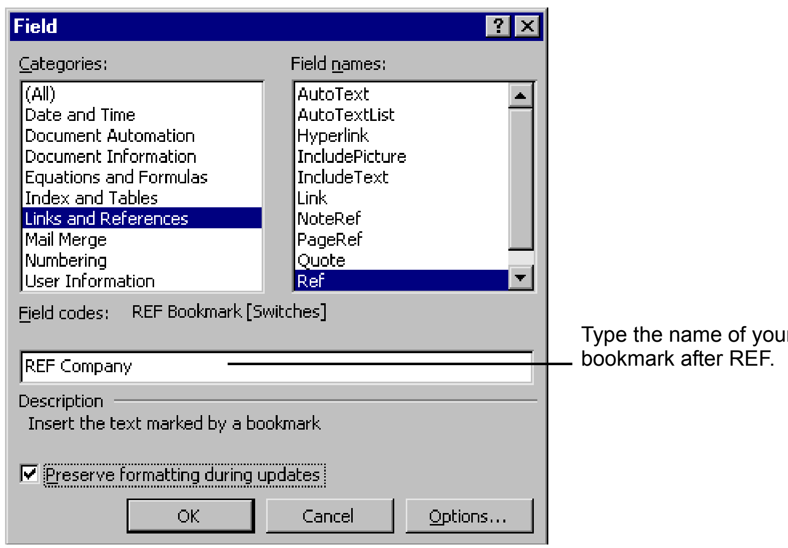
To create a component, you type the standard text and then create *bookmarks*, or Microsoft Word placeholders for custom data. When a sales representative generates a proposal, these bookmarks will be replaced with data from the Siebel application.

To create a component with bookmarks in Microsoft Word

NOTE: This procedure may vary slightly, depending on your version of Microsoft Word.

---

1. Create a new blank document in Microsoft Word.
2. Type the standard text that belongs in this component.
3. Place the cursor where you want to create a bookmark, and choose Insert > Field.



4. Click Links and References in the Categories list, and then click Ref in the Field Names list.

   REF appears in the Description box.

5 In the Comments box, enter the name of your bookmark after REF.

For example, you might type Company for company name, so that the Comments box contains:

```
REF Company
```

The bookmark name cannot begin with a number.

NOTE: If the text inserted into a bookmark contains double quotes ("), the inserted text will automatically be preceded by a backslash (\). If you do not want the backslash to appear in the inserted text, change the double quotes to single quotes in the Siebel software.

---

6 Note the name of the bookmark, because you will need it when you map the bookmark to a Siebel field names.

7 Click the Preserve Formatting During Updates check box if you want to maintain the format of the merged text.

8 Click OK to insert the field.

In your document, the following message appears:

```
Error! Reference source not found.
```

This message is Word's normal bookmarking convention. The error text will be replaced by appropriate data at the time of draft generation.

9 Repeat Step 3 on page 384 through Step 8 to add bookmarks for every field you want to insert in the text.

NOTE: If the same field is being inserted in several places, you can copy its bookmark and paste it into other parts of the document.

---

10 Save the component document as a .doc file.

Creating a Record for the Template

After you have created your template documents in Word, you can use Siebel Proposals to specify how they are assembled in the template.

To create a record for the template

1. From the application-level menu, choose View > Site Map > Document Administration > Proposal Templates.
2. In the Templates list, add a new record and complete the fields.

   Some fields are described in the following table.

Field	Comment
Name	Enter a name for the template.
Default	If you want this template to be the default proposal template, place a check mark in the Default field. When the user clicks Auto Proposal, Siebel Proposals uses the default template if there are no decision issues that match the theme of a proposal. You can select only one Opportunity Proposal default and one Account Proposal default.
Category	Select one of the following types of templates: ■ Opportunity Proposal templates are available only when you are working with Opportunities. ■ Account Proposal templates are available only when you are working with Accounts. ■ Agreement templates are available when you are working with Siebel Professional Services Agreements.
Mapping Name	Used to indicate the group of bookmark fields to be used with this template. Leave this field blank until you create a mapping.
Template File Name	The Word template document.

Field	Comment
Theme	If you want to associate the template with a particular decision issue, click Decision Issue List in the Theme field, and select a theme from the Decision Issue dialog box. When you give your proposal template a theme, you associate it with a particular decision issue that is important for your opportunity. When a proposal theme matches the number one decision issue for the current opportunity, Siebel Proposals automatically selects the correct template when the user clicks Auto Proposal. Users can also select a theme template if they want. Because accounts and agreements are not related to decision issues, the Theme field is not applicable for Account Proposal and Agreement templates. It is used only for Opportunity Proposal templates.
Description	Enter a description of the template.
Language	The language in which the template was written.
Locale	The template is specific to the locale.

About Creating the Template Structure

After you have created your Word documents and a record for your template, define the structure of your proposal template.

A proposal is made up of *sections*, which divide and subdivide your proposal. Depending on your needs, a single section might contain multiple components or a single component.

The type of a section depends on the nature of the data it contains. For example, file sections contain documents, chart sections reference Siebel charts, report sections reference Siebel reports, and so on.

Defining Template Sections

You define the structure of the proposal template by creating sections in the Proposal Template Administration view, which are associated with the Template record you created for this template. You must create top-level sections. Optionally, you can add subsections to these. Your proposal structure can have multiple levels of sections, because a subsection can contain other subsections.

Creating Top-Level Sections

First, you must create top-level sections.

To create top-level sections

1. From the application-level menu, choose View > Site Map > Document Administration > Proposal Templates.
2. In the Template Explorer list, in the left frame, click the + icon next to the template record that you created for this proposal.

   The Sections folder appears in the list.
3. In the Explorer list, click the + icon next to the Sections folder.

   The Sections list appears in the right frame.
4. In the Sections list, add a new record.
5. In the Name field, enter a name for the section, which will not appear in the proposal itself.
6. In the Sequence field, specify the order in which this section should appear in the proposal.
7. In the Section Type field, indicate the type of section you are creating. The following table describes the section types available.

Type	Comments
File	Contains only proposal text in DOC or TXT format.
Chart	Inserts a Siebel chart. The chart can be placed in the left margin, right margin or centered, and you can change the x, y, and z axes.

Type	Comments
Locator	Pulls in documents from the Siebel Encyclopedia. For example, if you create a locator section, Siebel Proposals can dynamically pull in documents from the encyclopedia that are related to the products the opportunity is interested in. For instance, if you want the proposal to dynamically insert text related to the products on the opportunity, use a Locator. The file types must be DOC, TXT, or RTF. If more than one marketing document meets the Locator criteria you specify, Siebel Proposals inserts each.
Organization Chart	Creates a slide and pulls in organization charts for the account or opportunity associated with the template. Charts are automatically centered.
Report	Dynamically inserts a Siebel report (such as Siebel Quote). When inserting reports, the Proposal engine converts the Actuate report to HTML and inserts the HTML version as a table in your proposal. When designing your reports to be included in Siebel Proposals, you may want to review headers and footers, because HTML sometimes crops these. Only Actuate reports can be included. Microsoft Access reports cannot be included.
Table	Pulls Siebel application data into a table format. You select fields to be included, the sequence of the fields, and the column length. By selecting a Table Section, you also allow creation of a Related Table section. See "Adding Related Table Subsections" on page 396

8. Complete the fields applicable to your section type. Table 27 describes the fields that you should complete for each type of section.

9. Repeat Step 4 on page 389 through Step 8 to add all the top level sections that are needed.

Table 27. Selected Fields in the Proposal Template Administration View

Section Type	Field	Comments
All	Condition	Conditions can be applied to all section types. For information about conditions, see "Using Conditions in Templates" on page 400.
File	N/A	Only the Condition field is applicable.

Table 27. Selected Fields in the Proposal Template Administration View

Section Type	Field	Comments
Chart	Business Object	The Siebel business object from which the chart information is coming (for example, Opportunity). Select from the Business Object list, which lists all available Siebel business objects.
	Chart or Table Name	The name of the chart applet you want to insert into this section (for example, "Opportunity Chart Applet - Current Opportunity Analysis"). The list contains all available applets.
	Search Spec	Any search criteria you want to use to restrict data for the chart (for example, Revenue > 500000).
	Width	How wide the chart should be in the proposal document. The default width is 400 pixels.
	Height	How high the chart should be in the proposal document. The default height is 300 pixels.
	Category	With charts that provide multiple X-axis options, this field allows you to set the option to use for the X-axis. For example, in the Lead Analysis by Rep chart, the X-axis can be Sales Representative or Quality.
	Function	With charts that provide multiple Y-axis options, this field allows you to set the option to use for the Y-axis. For example, in the Lead Analysis by Rep chart, the Y-axis can be Number of Opportunities, Opportunity Revenue, or Average Opportunity Revenue.
	Series	This field allows you to set the Z-axis you wish to use for charts that provide multiple Z-axis options.
	Chart Location	Location of the chart on the proposal page: Left, Right, or Center. Any text components you include in your chart section will wrap around the chart. For example, if you put your chart on the left, the text component will be inserted to the right of the chart.

Table 27. Selected Fields in the Proposal Template Administration View

Section Type	Field	Comments
Locator	Information Retrieval Method	Select the relationship to use to find the literature (for example, Oppty Competitor Lit, which is the literature on competitors associated with the opportunity).
	Retrieved Literature Category	Indicate the type of literature you are looking for (for example, brochures, or specification sheets). This helps you to filter out the documents from the encyclopedia that you want to include in the proposal.
Organization Chart	Business Object	The Siebel object from which the information is taken. Select from the picklist, which contains all available business objects from your repository, or enter the name in the field.
	Chart or Table Name	The name of the applet that contains the organization chart data (for example, the Opportunity Organization Analysis applet).

Table 27. Selected Fields in the Proposal Template Administration View

Section Type	Field	Comments
Report	Business Object	The Siebel business object from which the report information is coming (for example, Opportunity). Select from the Business Object list, which lists all available Siebel business objects. For example, to include a quote report in your proposal, you would select Quote.
	Report Name	The name of the report you want to insert in this section. Select from the list, which shows all available reports. For example, you might choose Proposal Quote.
	Link Spec	Specifies the data to insert in your report. In the previous quote example, the Link Spec is Opportunity, Id/Quote, Opportunity Id. The syntax of the Link Spec is: `<Parent Business Component Name><Comma><Parent-ID Field Name><Slash><Child Business Component Name><Comma><Child-ID Field Name>` Descriptions of these fields can be found in *Siebel Tools Online Help*. The Child-ID-Field-Name may vary, depending on whether the relationship between your parent business component and child business component is one-to-many or many-to-many. You or your system administrator can find Link Spec information in the Siebel Repository. You can include only Actuate reports.
	Search Spec	The search criteria. For example, if you want to insert only the Active Quotes for the Opportunity, your Search Spec is Active = 'Y'.

Table 27. Selected Fields in the Proposal Template Administration View

Section Type	Field	Comments
Table	Business Object	This is the Siebel object from which the information is taken. Select from the list, which contains all available business objects from your repository, or enter the name in the field. For example, if you want to include a list of products being offered to the opportunity, the Business Object is Opportunity.
	Chart or Table Name	This is the name of the applet where the table data is stored. In the example used for Business Object, the applet is Opportunity Product Applet.
	Width	Width represents a percentage of the space available between the template margins. If you choose 100, that equates to 100% of the space between the Template margins. If you enter 125, that represents 125% of the space between the borders. If left blank, the width of the columns in the table is based on pixels.
	Table Fields	Click the Select button to bring up the Table Fields dialog box; then, for each field you want in the table, click New and enter the following information: ■ The Field Name of the field; for example, Product. ■ The Sequence in which you want the field listed. ■ The Width of the column in the table; column Width is measure in pixels. The default (and minimum) column width is 100 pixels. A second way to define column width is by percentage of the table width. When a value is entered into table width, column width equates to percentage of total table width. For example, if there are three fields and table width is set to 100, field widths of 25, 65, and 35 would equate to 25%, 65%, and 35% of the total width of the table. In this example, if the table width was not set, the field widths would equate to 25, 65, and 35 pixels. ■ The Alignment of the data in the field: Left, Center, Right.

Adding Subsections

After adding top-level sections, you may want to add subsections to one or more of them.

To add subsections to an existing section

1. From the application-level menu, choose View > Site Map > Document Administration > Proposal Templates.
2. In the Template Explorer list, in the left frame, click the + icon next to the template to which you want to add a subsection.

   The Sections folder appears in the list.
3. In the Template Explorer, click the + icon next to the Sections folder for this template.

   The Explorer list shows the sections for this template, and the Sections list appears to the right.
4. In the Template Explorer, click the + icon next to the section to which you want to add a subsection.

   The Sections, Related Table, and Components folders for this section appear in the list.
5. Click the + icon next to the Sections folder for this section.

   The Sections list appears, listing all subsections under this section.
6. Use the Sections list to add a subsection in the same way you used it to add a top-level section, as described in "To create top-level sections" on page 389.

NOTE: When a proposal is generated, a section is generated before any of its subsections and is displayed above a subsection in the finished document.

Adding Related Table Subsections

After adding a Table Name subsection, you can add related tables that provide detailed information for the first table. For example, if the tables subsection contains a quote record, the related table can contain the quote line items. The relationship between the information is essentially a parent-child-grandchild relationship; the opportunity is the *parent* record, the quote table is the *child*, and the related table containing the quote line items is the *grandchild*.

To add a related table

1. From the application-level menu, choose View > Site Map > Document Administration > Proposal Templates.
2. In the Template Explorer list in the left frame, click the + icon next to the template to which you want to add a related table.

   The Sections folder appears in the list.
3. In the Explorer list, click the + icon next to the Sections folder.

   The Sections list appears in the right frame.
4. In the Sections list, add a new section or edit an existing section.
5. In the Section Type field, select Table and enter the table name.
6. Complete all necessary fields.
7. In the Explorer list, click the + icon next to the Related Tables folder.

   NOTE: The Related Table folder in the Template Explorer is used only for the Table section type. This folder can be edited only if a table has already been added.
8. In the Related Tables dialog box, complete the fields as described in the following table.

Field	Comments
Business Object	Select the Siebel object to which this table is related.

Field	Comments
Table Name	Select the name of the related table applet.
Field Name	Select the fields to be displayed in this table. If none are selected, all fields appear. The width is interpreted the same way as the parent table section. If the width of the table section is set, the width of the fields is used as percentages instead of pixels.

Adding Components to Template Sections

Now that you have defined the structure of your document, you must specify the location of the component documents that will probably make up the bulk of your proposal.

For sections that draw on data from a Siebel database (such as Chart and Report), you have specified all the information necessary for Siebel Proposals to generate the appropriate contents. However, the component documents, which you created earlier in Word, are not part of the proposal until you add them to the appropriate sections.

NOTE: Components can be added to any kind of section (not just a File section), and a section can contain multiple components.

To add a component to a proposal template

1. From the application-level menu, choose View > Site Map > Document Administration > Proposal Templates.
2. In the Templates Explorer, in the left frame, click the + icon next to the template to which you want to add a component.
3. Click the + icon next to the Sections folder.
4. Click the + icon next to the particular section that will include a component.

   The Sections, Related Table, and Components folders appear.
5. Click the + icon for the Components folder.

   The Components list appears on the right.
6. In the Components list, add a new record.

   The Add Sales Tools dialog box appears.
7. In the Add Sales Tools dialog box, select the component you want to add and click Add. If your component does not appear in the list, click New to add it. In the new entry applet, complete the fields as described in Step 9 on page 399.

   A new record is added to the Components list.

8 In the Components list, select the new record, and then click the Edit button.

9 Complete the fields, as described in the following table.

Field	Comments
Name	Enter a name for the component.
File Name	This field was filled in automatically when you selected a file from the Add Sales Tool dialog box.
Sequence	Specify the order in which this component should appear in the section.
Condition	Enter a condition and this component will be displayed only when the condition is true.

Using Conditions in Templates

You can add query conditions to a section or a component to specify the conditions under which the section or component will be used in the proposal. For example, if you have two executive summaries—one for deals of over $100,000 and another for smaller deals—you can use the Condition field in each Executive Summary section to allow Siebel Proposals to insert the appropriate executive summary based on the condition that is true.

Entering Criteria

You can enter query criteria in a section or component record's Condition field (such as [Revenue] > 100000). If the condition is TRUE, the section or component is included. If the condition is FALSE, the section or component is not included.

If you do not specify a condition, the section or component is always used.

You can create conditions for any field that is related to the business object of your proposal; use Opportunity fields for opportunity proposals, and Account fields for account proposals. If the definition of a condition needs to be based on fields from another business object, you must add those fields to the Opportunity or Account business object through either a link or a join.

The syntax for conditions is similar to the syntax for Siebel queries.

For more information about the syntax of Siebel queries, see *Fundamentals* and *Siebel Tools Reference*.

Examples of Criteria

The following examples illustrate the syntax for conditions:

- If the opportunity is for a Pentium computer, you want to insert a component about the advantages of the new Pentium II chip. In the Condition field for this component, type the following condition:

  ```
  EXISTS [Product] LIKE "Pentium*"
  ```

  This condition would look at the products listed for the opportunity. If the product name began with Pentium, Siebel Proposals would insert the component. Otherwise, Siebel Proposals would leave out this component.

  NOTE: For you to use a product in a condition, the product must have been entered using the Products view of the Opportunity screen. The condition will not work with products that were entered as Quote line items.

- If the account is located in Georgia, you should enter a section with terms and conditions limited to that state. In the section's Condition field, you enter the following:

  ```
  EXISTS ([State] = "GA")
  ```

  or

  ```
  [State] = "GA"
  ```

  You use the first line if the account is located only in Georgia, and the second line if the account is located in Georgia and another location.

  This condition will look at the state for the account. If the state is Georgia, then the section is included in the proposal. Otherwise, Siebel Proposals skips this section and moves on to the next.

- If the opportunity has a revenue amount greater than $1,000,000 and it is expected to close this year, you should insert a component on a special program for this type of customer. Enter the following condition in the Condition field for the component:

  ```
  [Revenue] > 1000000 AND [Close Date] <= ("12/31/2003") AND [Close
  Date] >= ("1/1/2003")
  ```

  After you enter a condition, test it as a query in the view you are going to use it in. For example, the above example involving Revenue and Close Date can be tested as a query in the My Opportunities view. If the query returns the data you expect, the query is probably in the correct format for your Condition field.

Defining Document Field Mappings

When you created the component documents of your proposal, you probably included bookmarks for personalized fields. You must map the bookmarks in the template's components to Siebel fields.

This mapping tells Siebel Proposals which Siebel field to use for substituting data for a particular bookmark in your proposal template. For example, by mapping the bookmark Company to the Account field, you tell Siebel Proposals to replace each Company bookmark with the value of the Account field.

You cannot map fields to a bookmark in the template's header or footer unless that bookmark is also somewhere else in the content of the template, other than in the footer or header.

Because you may be working with multiple proposal templates, you can have multiple sets of bookmarks. Therefore, you might have one mapping for one proposal template and another mapping for another proposal. Or you might use a single mapping for several proposal templates. In either case, you must specify a mapping name in your template record to associate the template with a specific mapping.

If you map a bookmark to a multi-value field, the primary record of the group is retrieved. If you want to retrieve multiple values from a multi-value field, you can add a Table section to the proposal template. This section type will retrieve multiple values from the multi-value field in table format.

To map the bookmarks in a template's components to fields, you must perform the following tasks:

- Create a mapping
- Associate a template with the mapping

NOTE: You may want to base your mappings on the sample mappings that come with Siebel Proposals, which are described in "Sample Field Mappings" on page 413.

Creating a Mapping

To create a field mapping, first create a record for the mapping, and then map the fields.

To create a record for a mapping

1. From the application-level menu, choose View > Site Map > Document Administration > Proposal Field Mappings.
2. In the Business Objects list, add a new record, and complete the fields.

   The fields are described in the following table.

Field	Comments
Mapping Name	Enter a name for the mapping.
Business Object	Select the business object that contains fields used in the proposal. For example, if you are creating an opportunity proposal, select Opportunity in the Business Object field.
Description	Enter a description of the mapping for your own use.

3. In the Business Objects Explorer, click the + icon next to the business object for which you just created a mapping.

   The Business Components folder for this business object appears.

4. Click the + icon next to this Business Components folder.

   The Business Components list for this business object appears.

5. In the Business Component list, add a new record, and complete the fields.

NOTE: You can associate more than one Business Component mapping to an Object. For example, if you are creating an opportunity proposal, you select the Opportunity Business Component. You can also select the TAS Account Business Component to create mappings for views under the Opportunity TAS view.

To map the fields

1. Navigate to the Business Component that contains the fields to be mapped.

2 Click the + icon next to the Business Component name.

The Business Component Fields folder appears.

3 Click the + icon next to the Business Component Fields icon.

The Business Component Fields list appears.

4 In the Business Component fields list, add a new record, and complete the fields.

5 Repeat Step 4 for each field that needs to be mapped.

For samples, see "Sample Field Mappings" on page 413.

Associating a Mapping with a Template

After you have created a mapping, you must associate it with a template to make it apply to all the components in that template. You can associate a mapping with one or more templates.

To associate a mapping with a template

1. From the application-level menu, choose View > Site Map > Document Administration > Proposal Templates.
2. In the Templates list, select the record for the template with which you want to associate the mapping.
3. In the Mapping Name field, select the mapping you created earlier.

Creating the Proposal Library

As a proposal administrator, you create and maintain the Proposal Library, which consists of pieces of text that sales representatives can add to their proposals. In the Siebel system, these pieces of text are components of the File section type.

Documents in the Proposal Library are different from the other components you created earlier, because components are parts of the proposal template, which are automatically included in proposals generated from that template. Documents in the Proposal Library are available to sales representatives only on an as-needed basis. As an administrator, you can also recommend documents to include in the templates.

After sales representatives create a default proposal automatically, they can add more documents from the Library or use the Edit Layout command to customize the proposal. The Proposal Library allows multiple proposals created from the same template to have different contents, and it can help sales representatives find answers to specific Request for Proposal (RFP) questions.

As an administrator, you place the various components in the Library and maintain the information. When the sales representatives need additional text to add to a proposal, they review the documents in the Library, select the component they want to insert, and automatically insert it into the proposal.

The sales force cannot update the information in the Library. The only sections and components available to sales representatives are those you provide for them.

To prepare the proposal library, you must:

- Create document files for the library
- Add sections for the proposal library
- Add components to the library sections
- Recommend documents to be included in templates

Creating Document Files

You create document files for the library in the same way that you create the proposal templates themselves. Use Microsoft Word to enter text and bookmarks, and then map these bookmarks to fields in your Siebel database.

NOTE: The only type of component that can be included in the Proposal Library is of the File section type. Other section types (Charts, Reports, and so on) can be included only in the template as described in "Defining Template Sections" on page 389.

Adding Sections to the Proposal Library

Sections are used to organize documents in the Proposal Library. For example, if some of the documents in the library are white papers and others are specifications, you may want to create a section for each of these. Then the users will be able to browse through the white papers and through the specifications separately. You must add at least one section to the Proposal Library. For more information about adding sections, see "Defining Template Sections" on page 389.

To add sections to the Proposal Library

1. From the application-level menu, choose View > Site Map > Document Administration > Proposal Library.

2. In the Library Explorer, in the left frame, click the + icon of the Library folder, if that folder is not already open.

3. Click the + icon of the Proposal Library folder.

   The Sections folder appears under it.

4. Add sections to this folder just as you added sections for the proposal.

Adding Components to the Proposal Library

After adding sections to the proposal library, you add components to them.

To add components to the Proposal Library

1. From the application-level menu, choose View > Site Map > Document Administration > Proposal Library.
2. Use the Library Explorer to navigate to the section to which you want to add a component.
3. Add the component to the library just as you would add a component to a proposal.

Recommending Content for a Proposal

As the administrator, you can simplify the process of creating a quick proposal by associating recommended content with the proposal template.

To associate recommended content with a proposal

1. From the application-level menu, choose View > Site Map > Document Administration > Proposal Library.
2. Use the Library Explorer to navigate to the section to which you want to add recommended content.
3. Open the selected section folder.
4. Click the + icon of the Components folder.
5. Select a component.
6. In the Components record, click the Recommended Templates field.
7. Add a Recommended Template to the Component record. You can recommend a component to one template or to many templates. For example, a legal clause might be required in all templates.
8. Repeat Step 5, Step 6, and Step 7 for each component that needs recommended content.

NOTE: Recommended contents are displayed when a proposal is edited using the Edit Layout command and the Show Recommended Only box is selected. See "Allowing Users to Customize Proposals" on page 410.

Allowing Users to Customize Proposals

The end user can select and modify the contents and section sequence of a proposal so that the proposal reflects the immediate sales needs of the situation. Proposals can be customized and created by the end user, and then quickly restructured and recreated to reflect a new situation.

To create a customized proposal

1. From the application-level menu, choose View > Site Map > Opportunities.
2. Select an existing opportunity or create a new opportunity.
3. Click the Proposals tab.
4. Click the Auto Proposal button.

   The template associated with the decision issue appears.

5. Click the Edit Layout button.

   The dialog box displays two columns:

   - The Contents Library lists the components in the Proposal Library that can be included in the proposal.
   - The Table of Contents column lists the components that are selected for the proposal and the order in which they will be displayed.

6 In the Contents column, use the directional buttons to move selected sections from the Contents column into the Sections column. If you make a mistake, click Reset Layout to undo all changes to the Table of Contents column and begin again.

NOTE: If the Show Recommended Only box is checked, only those component templates recommended by the administrator are displayed. If this box is not checked, all available components are displayed. For more information, see "Allowing Users to Display Proposals in HTML Format" on page 412.

---

7 In the Sections column, use the directional buttons to move a selected section to the desired sequence order. Use the X button to completely remove a section from the proposal.

NOTE: The Section column displays only top-level sections. User modifications to subsections must be done through the Proposal Table of Contents.

Allowing Users to Display Proposals in HTML Format

By default, proposals are saved only in document format, not in HTML format. The user's View HTML button is unavailable, and the user cannot view the proposals in HTML format.

To let the user display proposals in HTML format, you must edit the parameter DocumentServerViewHTML to give it the value True instead of False.

NOTE: Users of the Remote Client cannot view proposals in HTML format.

To allow users to display proposals in HTML format

1. Start the Server Manager.
2. Enter the command:

```
Srvrmgr> change param DocumentServerViewHTML=True for comp
DocServer
```

NOTE: While this procedure uses the Server Manager, parameters can also be changed using the Server Administration interface. For more information, see *Siebel Server Administration Guide*.

Sample Data: Field Mappings and Templates

To help you create your first proposal, your Siebel application includes sample data.

Sample Field Mappings

The Document Field Mappings Administration view includes two mappings: Opportunity and Account. These mappings list common fields you can use in creating your proposal. Table 28 and Table 29 show these mappings.

Table 28. For Business Object: Opportunity, Business Component: Opportunity

Bookmark	Business Component Field
Company	Account
Address	Street Address
City	City
State	State
ZipCode	Postal Code
Country	Country
Industry	Industry

Table 29. For Business Object: Account, Business Component: Account

Bookmark	Business Component Field
Company	Account
Address	Street Address
City	City
State	State
ZipCode	Postal Code
Country	Country
Industry	Industry
Account Type	Type

Use the Bookmark name in your Word document when you create a bookmark (for example, REF Company) and select this mapping for the Proposal Templates you create. It will match to the Siebel Business Component field (for example, Account) in your proposal draft with that assigned mapping.

Sample Templates

Siebel eBusiness Applications come with a sample database. The Document Template Administration view includes several sample proposal templates for Microsoft Word.

These sample proposals can be used as a reference when you define your own proposal template. In this sample database, you will find the following Siebel Proposals sample proposals:

- Standard
- Standard Account
- Strategic
- Quality Strategic Account

The sample templates fall into the following categories:

- Standard: Oppty Ppsl
- Standard Account: Acct Ppsl
- Strategic: Oppty Ppsl
- Opportunity Account Plan: Oppty Ppsl
- Quality Strategic Account: Acct Ppsl

Seed Templates

Customers using the Target Account Selling Module (TAS) can run an Opportunity Plan report in Microsoft Word using the TAS Opportunity Plan template. This proposal template is available in the seed database. For more information on setting up the TAS Opportunity Plan template, see the *Upgrade Guide* for the operating system you are using.

Literature 17

Siebel Literature allows you to give your users access to sales and marketing literature, such as product brochures, white papers, data sheets, and other types of literature items. Users view these documents using the application that created them, for example, Microsoft Word, Lotus Word Pro, or Adobe Acrobat.

Literature items may also be grouped into literature kits. Literature kits may include items not normally thought of as literature, such as promotional hats, coffee mugs, or T-Shirts. These kits may then be made available for distribution through fulfillment centers. Literature kits are covered later in this chapter. Fulfillment is covered in Chapter 14, “Correspondence.”

After you create literature records and associate documents with them, your employees can use literature in several ways:

- Employees can use the Literature or Infocenter screen to search through all the literature that is available to them.
- You can associate literature with business objects such as products or decision issues. Then users can display the literature when they are looking at the record for the associated business object. For example, the user can navigate to the Product screen, select a product, and click the Product Literature view tab to find all literature items associated with that product.
- When your employees use the Correspondence screen to create correspondence, they can include literature as enclosures. The user or fulfillment center may print out this literature document, or it may use preprinted copies of literature such as glossy brochures. It may also enclose promotional items that are parts of literature kits.
- Employees can track literature associated with products, industries, accounts and competitors so that they appear on your Briefing pages.

About Setting Up Literature Files

To set up a literature file, you must

- Create the document in another program
- Add a Literature record that includes the document in your Siebel application

---

NOTE: You may want to create a literature record without associating a document with it. For example, if the record represents an item such as a hat or cup, which is part of a literature kit, you need not associate a document with it.

Creating and Modifying Literature Files

Literature files can be created or saved using many kinds of software. The following file types are among the most common:

- Adobe Acrobat (.pdf)
- Excel (.xls)
- Word (.doc)
- PowerPoint (.ppt)
- Bitmap (.bmp)
- JPEG (.jpg)

To create a new literature file

1. Create a literature file in the appropriate software application.
2. Save the file on your hard drive.

To modify an existing literature file

1. From the application-level menu, choose View > Site Map > Document Administration > Literature.
2. Click the literature file that you want to modify.

   Information about the file is displayed in the More Info form. You can use this form to change existing comments or characteristics; for example, Distribution Method.

   The actual literature file opens in the type of tool that was used to create it; for example, Word.
3. Modify the file, and save it locally.
4. Upload the modified file to the existing Literature record.

Adding Literature Records

After you have created a literature file, you need to create a literature record in the Siebel database, in order to make the file available to Siebel applications users.

To add a literature record

1. From the application-level menu, choose View > Site Map > Document Administration > Literature.
2. In the Literature list, add a record and attach the literature file.

   The new file is added to the available literature. Appropriate information is displayed in the Literature list and the More Info form.
3. Enter the rest of the information required in the Literature list blank row and the More Info form of the new record. The following table briefly describes each field in the view.

Field	Comments
Name	Enter a name for the literature record.
Description	Enter a description of the document. Because literature items can be in any language, you may want to indicate the language of the item in this field (or in the Name field).
Literature Type	Select the type of the literature. You can create new literature types in the List of Values Administration view. Because the Literature Type field is used to filter literature items in various applets (by setting the Search Specification property for the applet in Siebel Tools), you should be careful when editing the Literature Type field.
Size	The size of the literature file. The information is automatically entered based on the size of the file that you select.
File Type	The file type of the literature file, for example DOC or PDF. The information is automatically entered based on the type of the file that you select.
Modified	The date that the literature file was last modified. The information is automatically updated whenever the file is updated.

Field	Comments
Update File	A check mark in this field indicates that users' copies of the literature will be updated automatically each time the original file is updated.
File Name	Click Browse and, in the Choose File dialog box, select the document file. You can also enter the file name manually.
Synopsis	Optionally, enter a synopsis of the document's content.
Web Display	If the literature item is a Web document, select the type of Web display—Frame, In-Line, New Window, or Window. This property is only for use by eBriefings and ERM.
Release Date	The release date when the document will first be displayed in My Briefings. For more information about eBriefings, see *Siebel eBriefings Administration Guide*.
Expiration Date	The expiration date when the document will no longer be displayed in My Briefings. For more information about eBriefings, see *Siebel eBriefings Administration Guide.*
Author	Optionally, click the select button and select the document's author.
Accounts	Select accounts with which the literature is associated. The literature is displayed in the Account Briefing if this account is tracked by the user. For more information, see *Siebel eBriefings Administration Guide.*
Competitors	Select competitors with which the literature is associated. Use this field to allow the user to display the literature using the Competitors screen. If you also select the Internal field, this literature will be displayed in the Comparative Literature view of the Competitors screen. If you do not select the Internal field, this literature will be displayed in the Competitor's Literature view of the Competitors screen. The literature is also displayed in a Competitor Briefing, if this competitor is tracked by the user. For more information, see *Siebel eBriefings Administration Guide.*

Field	Comments
Internal	Select this field if the document is internally sensitive and not intended for public distribution. If Internal is selected, the literature will not be available as an enclosure in the Correspondence screen, and it will be displayed in the Comparative Literature list of the Competitors screen. If Internal is not selected, the literature will be available as an enclosure in the Correspondence screen, and it will be displayed in the Competitive Literature list of the Competitors screen.
Local	For users of the Remote Client, this fields specifies whether the document is available on the local File System. If a document is not available locally, the user can request it by selecting the Request field.
Request	For users of the Remote Client, if this check box is selected, the literature will be downloaded during each synchronization session.
Distribution Method	Use this drop-down list to specify whether or not the file is automatically downloaded to users of the Remote Client. Publish: During each synchronization session, if your user does nothing, the file is downloaded automatically. If your user explicitly skips the file, the file is not downloaded in that synchronization session. By Request: During synchronization, the user receives the record, but not the actual file. To receive the file, the user must select the Request field.
Industries	Select any industries associated with the literature. The literature is displayed in My Briefing if the user tracks the industry.
Products	Select any products associated with the literature. Use this field to allow the user to display the literature using the Products screen. The literature is displayed in My Briefing if the user tracks the product.
Organization	Select organizations that will have visibility to this data.

Adding Translation Records

Translated literature files can be created using any of the previously listed software tools. (See "Creating and Modifying Literature Files.") You can create a record in the Siebel application for any translated file associated with your document.

To associate a translated document with a literature record

1. From the application-level menu, choose View > Site Map > Document Administration > Literature.
2. In the Literature list, select an existing record.
3. Click the Translations view tab.
4. In the Translation list, add a record and attach the translated document.

   Make sure that the file name clearly indicates that this is the translated file.

Adding Literature Item Kits

After you have created more than one literature file, you can combine individual files and other material to create literature item kits. This feature allows you to combine individual literature items into groups, so you can work with the group instead of with of the individual files. Literature item kits are used only as enclosures in correspondence.

For instance, you might have a set of literature items for prospective customers, including promotional brochures for your most popular products. You might also include items that are not documents: for example, a promotional kit for one of your products might include a brochure, a specifications sheet, a coffee cup, and a T-shirt.

Creating a literature item kit makes it easier to send this information out. When the user adds an attachment to correspondence, the user only has to select one literature item kit instead of all the individual items. Then the fulfillment center can mail all the items with the correspondence.

When you create a literature item kit, you create a Literature record that represents the entire kit, and you associate Literature Item records with it that represent the items in the kit. The fulfillment center can view the Literature record, but cannot view the Literature Item records. To let the fulfillment center know which items make up the kit, you can:

- **Pack kits together at the fulfillment center.** For example, you have a kit named Sales Promo that includes a brochure and a hat. The brochure and hat might be be shrink wrapped together at the fulfillment center or they might be stored in one bin at the fulfillment center, so the fulfillment center can select one of each item in the bin. Then, when the fulfillment center sees that they must fulfill the Sales Promo literature record, they would mail out this shrink-wrapped package or the items from this bin.

- **Make the Literature record a bill of materials.** You can include a document in the Literature record that describes all the Literature Items in the kit, or use the Literature records Description or Synopsis field to list all the Literature Items in the kit. For example, if the kit consists of a sales brochure and a hat, you would create a Literature record that represents the entire kit, you would attach two Literature Item records to it that represent the brochure and the hat, and you might also use the description field of the Literature record to say the kit includes a brochure and a hat. Then the fulfillment center would read the description field and mail out the items listed.

To add a literature item kit

1. From the application-level menu, choose View > Site Map > Document Administration > Literature.
2. In the Literature list, add a new record, or select an existing record. This record represents the literature item kit, so you should give it a name that indicates the kit contents.
3. Click the Literature Items tab.

   The fields previously displayed in More Info are shown under the Literature list at the top. The fields in the Literature Items list, in the middle of the view, display specific item information. The Component Items list appears at the bottom of the view.
4. In the Literature Items list, add a record and complete the necessary fields.

   Some fields are described in the following table.

Field	Comments
Primary	Indicates whether this is the primary item in the kit.
Physical Form	A description of the item’s physical form. This field supports multiple values to allow for multiple physical forms. For a document, you might choose 8 1/2 x 11 and Microfiche.
# of Pages	The number of pages in the document, if applicable.

Field	Comments
In Stock	Select the check box to specify whether the item is in stock, if applicable.
Part #	The item's part number, if applicable.

5. In the Component Items list, add a new record.
6. Select the record to be added, and then click Add.
7. In the Component Items list, add any other new records that are needed to create the kit.

About Making Literature Visible to Users

You can make literature visible to users in the following ways:

- **The Products Screen.** You can associate literature with a product, and the user can display it using the Products screen.
- **The Competitors Screen.** You can associate literature with a competitor, and the user can display it using the Competitors screen.
- **The Decision Issues Screen.** You can associate literature with a decision issue, and the user can display it using the Decision Issues screen.
- **The Correspondence Screen.** You can deselect the Internal field of a literature record and the user can select it as an enclosure in correspondence.
- **eBriefings.** You can associate literature with an account competitor, product, or industry. Literature is displayed in the Account Briefing, Competitor Briefing, or My Briefing page as a hyperlink.
- **The Literature Screen or Infocenter.** You can make literature visible to users, so it is included in the list of literature that they display in the Literature or Infocenter screen.

Sharing Literature Through the Products Screen

End users who are salespeople find it useful to view literature about your products when they are viewing other information about the products. If you associate literature with a product, end users can view this literature when they view the product record in the Products screen.

To share literature through the Products screen

1. From the application-level menu, choose View > Site Map > Document Administration > Literature.
2. In the Literature list, select a literature record or add a new literature record.
3. In the More Info form, click the select button in the Products field.
4. In the dialog box, select a Product and Part # to be associated with the literature record, and then click OK.

   If no Products were previously associated with the literature record, you can use the Associated Products dialog to set up a new association.

Sharing Literature Through the Competitors Screen

Salespeople find it useful to view their competitors' literature or to view literature that your company has prepared that compares your products with your competitors. If you associate literature with a competitor, end users can view this literature when they view the competitor record in the Competitors screen.

To share literature through the Competitors screen, you must associate it with a competitor. You must also decide whether to select the Internal flag, which determines whether it is displayed in the Comparative Literature List or the Competitive Literature list of the Competitors screen:

- If you select the Internal flag, the literature will appear in the Comparative Literature list, and it will not be available as an enclosure in the Correspondence screen.
- If you do not select the Internal flag, the literature will appear in the Competitive Literature list, and it will be available as an enclosure in the Correspondence screen.

Whether you select Internal depends on what type of literature it is:

- **Competitors' literature.** Your salespeople may want to use literature produced by competitors, such as sales brochures, to help them compare your products with what the competition is offering, However, you would not want to distribute this literature outside your company. You should select Internal, so the literature will not be available in the Enclosures list of the Correspondence screen, but it will appear in the Comparative Literature in the Competitors screen.
- **Comparative literature for internal use.** You may develop comparative literature internally, such as competitive intelligence, that is meant for use by your sales people and that you do not want to distribute outside your company. You should select Internal, so the literature will not be available in the Enclosures list of the Correspondence screen, but it will appear in Comparative Literature in the Competitors screen.

- **Comparative literature for external use.** You may develop comparative literature internally that is aimed at your customers, or you may have third party comparative reports that you want to distribute to your customers. You should not select Internal, so the literature will be available in the Enclosures list of the Correspondence screen, and it will also appear in Competitive Literature in the Competitors screen.

To share literature through the Competitors screen

1. From the application-level menu, choose View > Site Map > Document Administration > Literature.
2. In the Literature list, select a literature record or add a new literature record.
3. In the More Info form, click the select button in the Competitors field.
4. If the competitors that you want to list appear in the dialog box, select the competitors, and then click Close.
5. If the specific competitors are not listed in the dialog box, click New.

   The Competitors dialog box changes, now listing all possible competitors. You can use the Find button to locate a specific company.

6. In the Competitors dialog box, select the competitors and click OK.

   When users display this competitor record in the Competitors screen, they will be able to display the literature in Comparative Literature list if you selected Internal or in the Competitive Literature list if you did not select Internal.

Sharing Literature Through the Decision Issues Screen

End users who are salespeople find it useful to view literature about a decision issue when they are viewing other information about the decision issue. If you associate literature with a decision issue, end users can view this literature when they view the decision issue.

To share literature through the Decision Issues screen

1. From the application-level menu, choose View > Site Map > Data Administration > Decision Issues.
2. In the Decision Issues list, select the decision issue that you want to associate the literature with.

   The More Info list shows information about the issue. Existing literature records are listed under the Literature tab.
3. In the Literature list, add a new record.
4. Select the literature item that you want to associate with the decision issue, and click OK.

   The Literature list shows the selected literature item.

Sharing Literature Through the Correspondence Screen

End users may want to use literature as enclosures in correspondence. They may also use literature records that represent literature item kits as enclosures in correspondence.

Literature is available to users in the correspondence screen if the Internal field of the Literature record is not selected.

To share literature through the Correspondence screen

1. From the application-level menu, choose View > Site Map > Document Administration > Literature.
2. In the Literature list, select a literature record or add a new literature record.

   Make sure the Internal field of this record is not selected.

   When users create correspondence, they will be able to add this literature as an enclosure.

Sharing Literature Through eBriefings

Siebel eBriefings are personalized pages that combine information from the Siebel database, such as links with a user's new opportunities or new service requests, with background information about businesses the user works with. The user can choose which customer accounts and competitors to track, and information about those businesses will appear in the Account Briefing and Competitor Briefing view of that user's eBriefings screen. You can include links to literature about the account or competitor.

To share literature through eBriefings, you can associate it with Accounts, Competitors, Industries, or Products.

For more information about Briefings, see *Siebel eBriefings Administration Guide.*

To share literature through eBriefings

1. From the application-level menu, choose View > Site Map > Document Administration > Literature.
2. In the Literature list, select a literature record or add a new literature record.
3. If you want to display the literature in Account Briefings, in the More Info Accounts field, select the accounts with which the literature is associated. The end users who are tracking that account will see the literature item in the Account Briefing.
4. If you want to display the literature in Competitor Briefings, in the More Info form's Accounts field, select the competitors with which the literature is associated. End users must track that competitor for it to appear in Competitor Briefing.
5. In the Release Date field, enter the first date when the literature will appear in briefings. Literature associated with products or industries appears in My Briefing if the end user tracks those products and industries.
6. In the Expiration Data field, enter the last date that you want the literature to appear in briefings.

Sharing Literature Through Literature or Infocenter

Your end users may work with literature by displaying the Literature screen or Infocenter screen and searching the Literature list in that screen for the piece of literature they need.

You generally share literature with users by associating the user with access groups and associating literature with categories. Before you can do this, you must create categories that include literature, create access groups that include end users, and associate the categories with the access groups. For more information, see *Security Guide for Siebel eBusiness Applications*.

After you have completed this preliminary work, you can assign literature to end users as follows:

- When you produce new literature, associate it with the appropriate category and it will be visible to all end users in access groups associated with that category.
- When you hire new employees, associate them to with the appropriate access group and they will have visibility to all the literature in categories associated with that category.

A business manager who administers literature makes it visible to users by associating it with the appropriate category in either the Literature Administration screen or the Catalog Administration screen. After it is assigned in either of these ways, users in access groups associated with this category will be able to display it in the Literature screen.

To associate literature with a category using the Literature Administration screen

1. From the application-level menu, choose View > Site Map > Document Administration > Literature.
2. In the Literature list, select the record for the literature you want to associate with a category.
3. In the Category form, add a new record.
4. In the dialog box, select the item to be associated with the category, and then click OK.

   The literature is associated with the category.

To associate literature with a category using the Catalog Administration screen

1. From the application-level menu, choose View > Site Map > Catalog Administration > Catalog Administration.
2. In the Catalogs list, drill down on the Name of the catalog to be associated with the literature.

   A Categories list appears.
3. Click the Literature view tab.
4. In the Literature list, add a new record.
5. In the dialog box, enter identifying information about the literature (for example, the document Name), and then click Go.
6. When the dialog box reappears listing the needed literature, select the literature item and click OK.

   The literature is associated with the category.

D&B Integration 18

This chapter describes the integration of D&B data with your Siebel application. Some topics included in this chapter are:

- Business scenarios for using D&B data within your Siebel application.
- Overview information about loading D&B data into the Siebel database.
- Procedures for setting up the symbolic URL to allow real-time searches and on-line report access.
- Maps of D&B data to Siebel data fields.

About D&B Data

D&B is a leading provider of business information. D&B's information and technology solutions help businesses find profitable customers, reduce credit risk, manage receivables, and manage vendors. D&B's database of commercial information consists of over 75 million records world wide.

For connected users, you can use your Siebel application to integrate with D&B data and reports. As a mobile client, you can access D&B data for accounts and contacts that have been promoted from D&B marketing data.

This allows you to:

- Use D&B marketing data within your Siebel application.
- Access D&B business and credit reports from within your Siebel application.

You can use this D&B data to support the following:

- **New Business or Customer Acquisition.** By querying on company size, line of business, and other criteria provided by D&B, you can generate lists of prospects to add to the sales pipeline or to support outbound marketing programs. By using the D&B corporate family linkage information, you can identify new prospects and opportunities within a company's extended family.
- **Customer Segmentation and Penetration.** You can profile specific market segments such as geography, industry, size, and other criteria to identify untapped opportunities or better align sales territories.
- **Customer Qualification.** Use your access to D&B business and credit reports to obtain detailed background and risk information on a company in order to focus sales efforts on higher-probability accounts and shorten the sales cycle.

NOTE: This chapter describes how the administrator loads and updates D&B data. For information about viewing and using D&B data within the Siebel application, see *Siebel Sales User Guide*.

Business Scenarios

The following scenarios describe how you can use D&B data in your company.

Build and Grow Current Customer Relationships

D&B data can help you find out how many relationships you already have within the complete corporate family structure. Use the D&B D-U-N-S number to view the organizational hierarchy of your clients and also to aggregate account attributes at all levels within your clients.

For example, you are selling to 20 IBM locations and you find out that there are locations that you have never contacted.

Following the completion of a successful sales engagement, use D&B demographic data to query your existing customer base for other customers in the same industry who are approximately the same size. This gives you a targeted population for replicating the success and driving revenue.

New Business or Customer Acquisition

Despite best efforts by an organization's marketing department, the sales organization is constantly asking for more leads. To partially address the issue, the company provides all salespeople access to the companies in the D&B database so they can generate prospects in their territory.

Individual salespeople can query the D&B database using criteria matching their ideal target to find new leads. After generating a list of leads, salespeople can automatically add the companies and contacts to their accounts.

Additionally, D&B demographic data can be used to analyze customer buying habits and then applied to the business universe to provide targeted marketing lists for specific campaigns or for distribution to the sales force.

Customer Satisfaction and Account Planning

Standardizing customer information on the D&B D-U-N-S number gives you a means for house-holding your customer data and eliminating duplicate customer records. This increases your ability to manage existing customer relationships because all opportunities for a customer are linked to the same customer record.

Add D&B's corporate family linkage, and you have the ability to manage and plan for customers at a local and global level. For example, you may want to see a roll up of all opportunities and potential revenue for all companies and locations related to Coca-Cola worldwide.

Understanding the D&B D-U-N-S Number

The D-U-N-S (Data Universal Numbering System) number is a crucial component of D&B data. A D&B D-U-N-S number is a nonindicative, nine-digit number assigned to each business location in the D&B database. Each D-U-N-S number has a unique, separate, and distinct operation, and is maintained solely by D&B. Industries and organizations around the world use the D&B D-U-N-S number as a global standard for business identification and tracking.

Each company has a unique D&B D-U-N-S number associated with it. It acts as a unique identifier for a company in the D&B database.

To uniquely identify the association between different companies in the D&B database, each company also has associated D&B D-U-N-S numbers.

Several categories of D&B D-U-N-S numbers exist:

- D&B D-U-N-S Number—each unique business location listed in the D&B database is assigned a D&B D-U-N-S number. This column is called simply DUNS Number in your Siebel application.
- Global Ultimate D-U-N-S—the D&B D-U-N-S number belonging to a business's worldwide ultimate parent company.
- Domestic Ultimate D-U-N-S—the D&B D-U-N-S number belonging to the highest-level family member within a specific country.
- Parent/HQ D-U-N-S—the D&B D-U-N-S number belonging to a business's immediate headquarters or parent.

These numbers allow D&B to establish the relationships between different companies.

Process for Integrating D&B Data

The process of integrating D&B data into the D&B Account tables and the Siebel Account tables in the Siebel database involves the following steps:

- Obtaining D&B Data
- Loading D&B Data into staging tables in the Siebel database
- Running the Siebel Update Server Components

Obtaining D&B Data

You must obtain three data files from D&B:

- The Marketing Data file
- The MRC file
- The SIC file

Request these files in *Siebel format*, also referred to as 2202 or GDMDI data file format. D&B should be able to provide files in this format without difficulty.

To obtain MRC and SIC files, send email to:

dnb4siebel@dnb.com

In addition to these files, you can request D&B data layout documentation from D&B.

The Marketing Data File. This file contains detailed company information, such as the company's legal name, address, contact information, and so forth.

The MRC and SIC Files. These are both reference files required by the Siebel D&B modules. Both files contain information referenced by the demographic company data provided by D&B.

MRC stands for Management Responsibility Code. The MRC file contains a list of lookup values for the contacts and their positions such as CEO, Vice President of Marketing, and so on. Each contact has an associated numerical code that is referenced by the D&B marketing data to determine the title or position of a company contact.

SIC stands for Standard Industrial Classification, and is a code developed by the Federal government to describe the type of activity performed by the business at this location. The SIC file contains a list of SIC codes assigned and maintained by D&B along with their definitions. D&B's Primary SIC code indicates the line of business that provides the largest revenue contribution to the business. D&B also maintains and assigns six levels of subsidiary SIC codes to describe in greater detail additional lines of business activity for a given company. By default, the SIC code provided in the SIC file and the Marketing Data file is the 4-digit SIC code.

Loading D&B Data

After you have obtained the three D&B data files, you can start to load the data into the Siebel database. You can load the files in any order, but you must load all three files before running the Siebel update server component.

When creating your data loading scripts, refer to the documentation provided by D&B and to *Siebel Data Model Reference*.

The scripts and processes differ according to your database platform.

NOTE: When you integrate D&B data for the first time, you may want to contact Siebel Professional Services to obtain sample loading scripts for use as templates. See "Loading D&B Data Using Sample Scripts" on page 444.

The scripts load D&B data into staging tables in the Siebel database, as shown in Table 30.

Table 30. Staging Tables for Uploading D&B Data

File	Upload Location
Marketing Data file	S_DNB_UPDATE table This table is used as a staging area for the un-normalized D&B Marketing data.
SIC file	S_DNB_SIC table
MRC file	S_DNB_MRC table

NOTE: Definitions of these tables can be found in *Siebel Data Model Reference*.

Because SIC and MRC files change only rarely, updating D&B data usually requires deleting and reloading the D&B marketing data in the S_DNB_UPDATE table alone.

If you need to load new versions of the SIC and MRC files, you must delete the previously used staging tables.

Table 31 lists what D&B data to delete and what to load.

Table 31. Loading or Reloading D&B Data

If You Are...	Then...
Loading D&B data for the first time	■ Load the three D&B data files: Marketing Data file, SIC file, and MRC file.
Updating D&B data with a new Marketing Data file, but the SIC and MRC files have not changed	■ Delete data from the S_DNB_UPDATE table. ■ Load the Marketing file.
Updating D&B data with new Marketing Data, SIC, and MRC files	■ Delete data from the S_DNB_UPDATE, the S_DNB_SIC, and the S_DNB_MRC tables. ■ Load the three D&B data files: Marketing Data file, SIC file, and MRC file.

After loading files, you must run the D&B Update Manager (D&B) and the D&B Update Manager (Siebel) as described in "About Siebel Update Server Components" on page 448.

Loading D&B Data Using Sample Scripts

This section provides some guidance on how to load D&B data on Oracle, DB2, and Microsoft SQL Server platforms using sample scripts. These scripts are not provided as part of the Siebel product, but may be obtained from Siebel Professional Services.

CAUTION: Before running scripts, you should check them against the D&B data layout documentation and against the S_DNB_UPDATE table columns documented in *Siebel Data Model Reference*. Then, modify the scripts as required.

Loading D&B Data on Oracle

Oracle installations require you to run SQLLOADER control files. You need the following control files:

- s_dnb_update.ctl (for loading Marketing Data file into S_DNB_UPDATE table)
- s_dnb_sic.ctl (only required if loading the SIC file)
- s_dnb_mrc.ctl (only required if loading the MRC file)

NOTE: This procedure is based on the assumption that you understand how to run SQLLOADER. SQLLOADER is described in the Oracle documentation.

To load D&B data if you are using Oracle

1. Verify that the column order of your D&B file matches the column requirements in the .ctl file before running the loading script.
2. Truncate the appropriate staging tables (see Table 31 on page 443).

   To optimize loading performance, drop all indexes on the S_DNB_UPDATE table and re-create them after the scripts have completed. This can be done using Siebel utilities ddlexp (to back up the indexes before dropping) and ddlimp (to re-create them).
3. Modify the .sql file as appropriate for:
   - The name of your database

- The D&B filename and directory location
- The database table owner
- The user ID and password (with loading privileges) that you are using to load the data

4 Run SQLLOADER.

Loading D&B Data on DB2

DB2 installations require you to run DB2 IMPORT. You need the following .sql files:

- imp_update_new.sql (for loading Marketing Data file into S_DNB_UPDATE table)
- imp_sic_new.sql (only required if loading the SIC file)
- imp_mrc_new.sql (only required if loading the MRC file)

NOTE: This procedure is based on the assumption that you understand how to run DB2 IMPORT. DB2 IMPORT is described in the DB2 documentation.

To load D&B data if you are using DB2

1 Verify that the column order of your D&B file matches the column requirements in the .sql file before running the loading script.

2 Truncate the appropriate staging tables (see Table 31 on page 443).

   To optimize loading performance, drop all indexes on the S_DNB_UPDATE table and re-create them after the scripts have completed. This can be done using Siebel utilities ddlexp (to back up the indexes before dropping) and ddlimp (to re-create them).

3 Modify the .sql file as appropriate for:

   - The name of your database
   - The D&B filenames and directory location
   - The database table owner

- The user ID and password (with loading privileges) that you are using to load the data

4. Run DB2 IMPORT.
5. Optional: After running the import scripts, update the DB2 catalog statistics by executing RUNSTATS on the three tables that received the D&B data (S_DNB_MRC, S_DNB_SIC, S_DNB_UPDATE).

Loading D&B Data on Microsoft SQL Server

Microsoft SQL Server installations require you to run SQL scripts. You need the following format files and SQL scripts:

- For loading the Marketing Data file:
  - S_DNB_UPDATE.fmt—a format file to load the data into the tempS_DNB_UPDATE table
  - S_DNB_UPDATE.sql—an SQL script that loads the data into S_DNB_UPDATE table
- For loading the SIC file:
  - S_DNB_SIC.fmt—a format file to load the data into the tempS_DNB_SIC table
  - S_DNB_SIC.sql—an SQL script that loads the data into the S_DNB_SIC table
- For loading the MRC file:
  - S_DNB_MRC.fmt—a format file to load the data into the tempS_DNB_MRC table
  - S_DNB_MRC.sql—an SQL script that loads the data into the S_DNB_MRC table

---

NOTE: This procedure is based on the assumption that you understand how to run bcp (bulk copy process) or similar data-loading utility. The bcp utility is described in the Microsoft SQL Server documentation.

To load D&B data if you are using Microsoft SQL Server

1. Verify that the column order of your D&B file matches the column requirements in the .sql file before running the loading script.

2. Truncate the appropriate staging tables (see Table 31 on page 443).

   To optimize loading performance, drop all indexes on the S_DNB_UPDATE table and re-create them after the scripts have completed. This can be done using Siebel utilities ddlexp (to back up the indexes before dropping) and ddlimp (to re-create them).

3. Modify the .sql file as appropriate for:

   - The name of your database
   - The D&B filename and directory location
   - The database table owner
   - The user ID and password (with loading privileges) that you are using to load the data

4. Run bcp or another data loading utility.

About Siebel Update Server Components

Whenever you load or reload D&B data, you must update the D&B Account tables and the Siebel Account tables in the Siebel database. This update is accomplished by running server components:

- D&B Update Manager (D&B): Moving D&B marketing data from the staging table (S_DNB_UPDATE) into the normalized D&B Account tables, which are the basis for the D&B All Accounts View (Figure 19 on page 450).
- D&B Update Manager (Siebel): Updating the records in the Siebel Account tables for accounts with matching D-U-N-S numbers (Figure 20 on page 451).
- A third component, D&B Update Manager MultiTask, is also provided. This component can be used in place of D&B Update Manager (D&B) or D&B Update Manager (Siebel) to run the update using multiple, parallel processes ("About the Multiple Task Siebel Update Server Component" on page 451).

Overview of the Update Process

This section outlines the process of loading D&B data from the staging tables to the D&B Account tables and through to updating the Siebel account tables.

This process recommends using the D&B Update Manager MultiTask server component to run server component tasks in parallel. However, use of the single task D&B Update Manager (D&B) and D&B Update Manager (Siebel) server components is also documented in this chapter.

1. Make sure you have loaded the D&B data into the staging tables as discussed in "Loading D&B Data" on page 442 and "Loading D&B Data Using Sample Scripts" on page 444.
2. Update the D&B Account tables with data from the staging tables:
   - To optimize performance, you may choose to do one of the following:
     - For first time data loading, that is, when there are no D&B records in the database, drop the indexes on these D&B Account tables: S_DNB_ORG, S_DNB_ORG_SIC, S_DNB_CON_MRC, and S_PRSP_CONTACT.

- For subsequent updates, drop the indexes on the S_DNB_ORG table only, all except for the indexes S_DNB_ORG_U1 (DUNS_NUM), S_DNB_ORG_P1 (ROW_ID), and S_DNB_ORG_M01 (the clustered index) on this table.

- Create a search specification on the D-U-N-S number to set up your preferred batch sizes and determine the corresponding D-U-N-S number ranges per batch for loading the data from the staging tables to the D&B Account tables.
- Execute concurrent D&B Update Manager (D&B) server tasks by running the D&B Update Manager MultiTask server component. See "About the Multiple Task Siebel Update Server Component" on page 451 and "Running the Siebel Update Server Components" on page 455.
- Continue to execute the concurrent D&B Update Manager (D&B) server tasks until all data is loaded into the D&B Account tables.
- If you dropped indexes on the D&B Account tables, re-create them. This can be done using Siebel utilities ddlexp (to back up the indexes before dropping) and ddlimp (to re-create them).

3. Update the Siebel Account tables from the D&B Account tables for accounts with matching D-U-N-S numbers by executing concurrent D&B Update Manager (Siebel) server tasks using the D&B Update Manager MultiTask server component. See "Multiple D&B Update Manager (Siebel) Processes" on page 453 and "Running the Siebel Update Server Components" on page 455.

About the Single Task Siebel Update Server Components

The update server components are part of the Dun and Bradstreet Enterprise Component Group. This group and each of its D&B Batch Components must be enabled. Once enabled, each component can be run as a batch task. Figure 19 shows how the staging tables are mapped to the D&B Account tables.

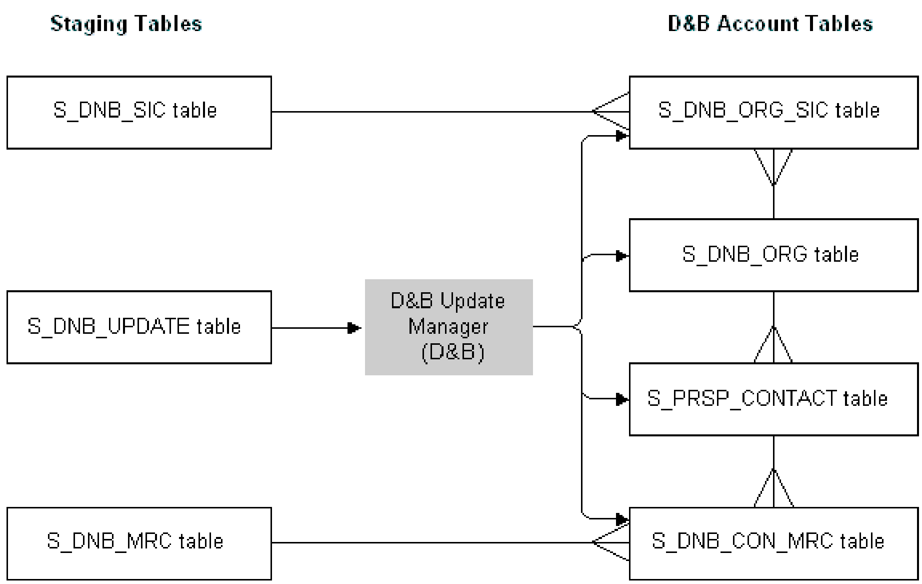


Figure 19. D&B Update Manager (D&B) Table Names

[Figure 20](#) shows how the D&B Account tables are mapped to the Siebel Account tables.

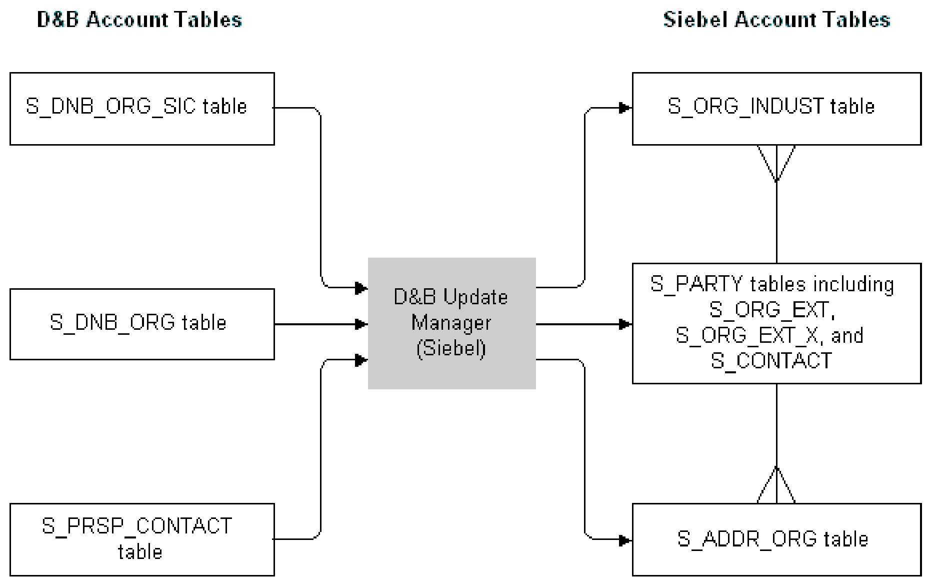


Figure 20. D&B Update Manager (Siebel) Table Names

"Field Mapping for the D&B Update Manager Process" on page 466 lists the default table mapping from the D&B Account tables to the Siebel Account tables that are used by the D&B Update Manager (Siebel) server component.

About the Multiple Task Siebel Update Server Component

You can use the server component DNBUpMgrMultiTask to spawn multiple Update Manager processes. Running several parallel processes helps you maximize your performance with large data loads and gives you greater scheduling flexibility. You can control the number of processes that are created by editing the dnbtask.cfg file. The dnbtask.cfg file contains two sections, one to set tasks for the D&B Update Manager (D&B) process and the second to set tasks for the D&B Update Manager (Siebel) process.

The dnbtask.cfg file is located in the sqltempl subdirectory, in the server installation directory.

Multiple D&B Update Manager (D&B) Processes

By default the dnbtask.cfg file sets up three simultaneous tasks, based on D-U-N-S number ranges. The DNBUpMgrDNB portion of the file looks like this:

```
[DNB]

Task1 = ,100000000

Task2 = 100000000,200000000

Task3 = 200000000,
```

These four ranges translate into four DNBUpMgrDNB tasks, each taking care of loading records within a particular D-U-N-S number range:

,100000000 means D-U-N-S numbers < 100000000

100000000,200000000 means D-U-N-S numbers >= 100000000 and < 200000000

200000000, means D-U-N-S numbers >= 200000000

Edit the file to change the number of parallel processes created or the range of D-U-N-S numbers updated.

CAUTION: If you use DNBUpMgrMultiTask to run multiple UpdateMgr processes, you must make sure that processes running at the same time have *mutually exclusive* ranges. Unpredictable results will occur if multiple processes collide.

Multiple D&B Update Manager (D&B) Processes with First Time Data Loading

The first time you load D&B data, that is, when there are no D&B records in the database, you may use a special .sql file (dnbinitial.sql) which is optimized to do only inserts. This results in faster loading of data than using the dnbmaps.tsq file.

To use the dnbinitial.sql file, set the server component parameter DNBConfigFile to dnbinitial.sql. (For examples, see Step 4 in the “To run the D&B Update Manager (D&B) server component from within your Siebel application (multiple task process)” procedure on page 457 and Step 2 in the “To run the D&B Update Manager (D&B) server component from a command line (single or multiple task process)” procedure on page 458.) This can be done from Server Manager or from your Siebel application.

For subsequent updates, the DNBConfigFile should be set to dnbmaps.tsq.

NOTE: The dnbinitial.sql file assumes that you dropped the indexes on the D&B Account tables (Step 2 in the “To load D&B data if you are using Microsoft SQL Server” procedure on page 448).

Multiple D&B Update Manager (Siebel) Processes

By default the dnbtask.cfg file sets up five simultaneous tasks, based on tables updated. The DNBUpMgrSieb portion of the file looks like this:

```
[Siebel]

Task1 = UPDATE_SIEBEL_ACCOUNT

Task2 = UPDATE_INDUST, COMMIT, UPDATE_SIEBEL_INDUST, COMMIT,
UPDATE_SIEBEL_SYNONYM

Task3 = UPDATE_SIEBEL_ADDR_PHY, COMMIT, UPDATE_SIEBEL_ADDR_MAIL

Task4 = UPDATE_SIEBEL_CONTACT

Task5 = UPDATE_SIEBEL_LOC1, COMMIT, UPDATE_SIEBEL_LOC2, COMMIT,
UPDATE_SIEBEL_LOC3
```

You may edit the file to change the number of parallel processes created. However, note that the order of the updates within individual tasks is important; for example UPDATE_INDUST should be done before UPDATE_SIEBEL_INDUST. Use caution when updating the DNBUpMgrSieb portion of the dnbtask.cfg file.

CAUTION: If you have modified the RTI configuration file to insert new accounts into the Siebel Accounts table, do not run the multiple task process. Instead you must run the single task D&B Update Mgr (Siebel) server component. Make sure you have modified the dnbmaps.sql file used by the single task server component. The order of the updates is critical to data integrity if new accounts are being added.

Running the Siebel Update Server Components

There are two ways to run the Siebel update server components:

- From within the Siebel application
- From a command line interface, using Server Manager

Procedures for running the update processes from both within the Siebel application and from the command line. (Whatever procedures you choose to follow, make sure that the D&B Update Manager (D&B) process is complete before you start the D&B Update Manager (Siebel) process.)

- "To run the D&B Update Manager (D&B) server component from within your Siebel application (single task process)" on page 456
- "To run the D&B Update Manager (D&B) server component from within your Siebel application (multiple task process)" on page 457
- "To run the D&B Update Manager (Siebel) server component from within your Siebel application (single task process)" on page 457
- "To run the D&B Update Manager (Siebel) server component from within your Siebel application (multiple task process)" on page 458
- "To run the D&B Update Manager (D&B) server component from a command line (single or multiple task process)" on page 458

- "To run the D&B Update Manager (Siebel) server component from a command line (single or multiple task process)" on page 459

NOTE: If you have just installed the Siebel Server or if you have made changes to the Siebel Name Server, you need to synchronize before running the Siebel update server component. For more information about synchronizing server components, see *Siebel Server Administration Guide*.

TIP: If you are going to run the D&B Update Mgr (Multi-task) component, make sure that the maximum number of tasks (MaxTasks parameter) is set correctly to accommodate the number of tasks that you specified in the dnbtask.cfg file. For information about MaxTasks, see *Siebel Server Administration Guide*.

To run the D&B Update Manager (D&B) server component from within your Siebel application (single task process)

1. Check the state and mode for the Update Mgr component:

   a. From the application-level menu, choose View > Site Map > Server Administration > Enterprise Configuration.

   b. Click the Enterprise Component Groups view tab.

   c. In the Enterprise Component Groups list, select the Dun and Bradstreet component group.

   d. For the Dun and Bradstreet record, make sure that the state is Enabled.

      If it is not enabled, enable it by clicking the menu button in the Enterprise Component Groups list and clicking Enable Component Group. Then synchronize. For more information on enabling component groups and synchronizing server components, see *Siebel Server Administration Guide*.

2. From the Show drop-down list, select Enterprise Operations.

3. Click the Component Requests view tab.

4. In the Component Requests list, click New.

5 In the Component Requests form, in the Component/ Job field, select D&B Update Mgr (D&B). Make sure the Mode is set to Asynchronous.

6 In the Component Requests form, click the menu button and click Submit Request.

7 When the D&B Update Mgr (D&B) is done, open the log directory. If there have been problems with the process, there will be a log file, which you should review. The log file is named DNBUpMgrDNB_*TaskNumber*.log.

To run the D&B Update Manager (D&B) server component from within your Siebel application (multiple task process)

1 Follow Step 1 to Step 4 in the "To run the D&B Update Manager (D&B) server component from within your Siebel application (single task process)" procedure on page 456.

2 In the Component Requests form, in the Component/ Job field, select D&B Update Mgr (Multi-task). Make sure the Mode is set to Asynchronous.

3 In the Component Request Parameters list, add a new record, set the Name field to DNBTaskCode, and in the Value field enter DNB.

4 If data is being loaded for the first time, add a second new request parameters record, set the Name field to DNBConfigFile and in the Value field enter dnbinitial.sql

5 In the Component Requests form, click the menu button and click Submit Request.

6 When the process is done, open the log directory. If there have been problems with the process, there will be a log file, which you should review.

To run the D&B Update Manager (Siebel) server component from within your Siebel application (single task process)

- Follow the procedure "To run the D&B Update Manager (D&B) server component from within your Siebel application (single task process)" on page 456, except that at Step 5, set the Component/ Job field to D&B Update Mgr (Siebel).

To run the D&B Update Manager (Siebel) server component from within your Siebel application (multiple task process)

1. Follow Step 1 to Step 4 in the "To run the D&B Update Manager (D&B) server component from within your Siebel application (single task process)" procedure on page 456.
2. In the Component Requests form, in the Component/ Job field, select D&B Update Mgr (Multi-task). Make sure the Mode is set to Asynchronous.
3. In the Component Request Parameters list, add a new record, set the Name field to DNBTaskCode and in the Value field enter Siebel.
4. In the Component Requests form, click the menu button and click Submit Request.
5. When the process is done, open the log directory. If there have been problems with the process, there will be a log file, which you should review.

To run the D&B Update Manager (D&B) server component from a command line (single or multiple task process)

1. Log in to the server using Server Manager. Use a command with this format:

   ```
   SIEBEL_ROOT\siebsrvr\bin\>srvrmgr /g gateway /e enterprise_name /
   u db_username /p password /s siebserver
   ```

   Examples:

   ```
   >srvrmgr /g evlab6 /e siebel /u sadmin /p sadmin /s evlab6
   ```

   ```
   >srvrmgr /g smte420s053:2321 /e siebel /u sadmin /p sadmin /s
   smte420s053
   ```

2. At the srvrmgr prompt, enter one of the following commands:
   - `start task for comp DNBUpMgrDNB` (for single task process)
   - `start task for comp DNBUpMgrMultiTask with DNBTaskCode=DNB` (for multitask process)
   - `start task for comp DNBUpMgrMultiTask with DNBTaskCode=DNB, DNBConfigFile=dnbinitial.sql` (for initial data loading; see "Multiple D&B Update Manager (D&B) Processes with First Time Data Loading" on page 452)

3 During the DNBUpMgrDNB or DNBUpMgrMultiTask server process, monitor the status by entering the list task command:

```
list task for comp DNB%
```

4 When the D&B Update Mgr (D&B) or D&B Update Mgr (Multi-task) server process is finished, open the log directory. If there have been problems with the process, there will be a log file, which you should review. The log files are named DNBUpMgrDNB_*TaskNumber*.log or DNBUpMgrMultiTask_*TaskNumber*.log.

To run the D&B Update Manager (Siebel) server component from a command line (single or multiple task process)

- Follow the procedure "To run the D&B Update Manager (D&B) server component from a command line (single or multiple task process)." At the srvrmgr prompt (Step 2 in the "To run the D&B Update Manager (D&B) server component from a command line (single or multiple task process)" procedure on page 458), enter one of the following commands:
  - `start task for comp DNBUpMgrSIEB` (for single task process)
  - `start task for comp DNBUpMgrMultiTask with DNBTaskCode=Siebel` (for multitask process)

Setting Up the Symbolic URL for Access to the D&B Database

When you have a connection to the Internet and have a D&B account set up already (with a user ID and password), you can:

- Obtain the most current account information by invoking real-time searches of the D&B database and online purchase
- Access and order D&B business and credit reports

For more information about D&B reports and about searching D&B for new accounts, see *Siebel Call Center User Guide*.

To access D&B data live from your Siebel application through the D&B Web site, you must first contact D&B for a user ID, password, and payment options. Then you can set up your Siebel application to access the D&B database.

To set up the symbolic URL for D&B real-time search and update

1. From the application-level menu, choose View > Site Map > Integration Administration > Symbolic URL Administration.
2. In the Symbolic URL list, select DNBGlobalAccess.
3. Make sure the URL is https://globalaccess.dnb.com/access/scripts/broker.asp
4. In the Symbolic URL Arguments list:
   a. Select the USERID record, and enter the user ID provided by D&B in the Argument Value field.

      NOTE: This field is not case-sensitive.

   b. Select the USERPASS record, and enter the password provided by D&B in the Argument Value field.

To set up the symbolic URL for D&B report ordering

1. From the application-level menu, choose View > Site Map > Integration Administration > Symbolic URL Administration.

2. In the Symbolic URL list, select DNBReport.

3. Make sure the URL is https://*reportserver*/scripts/ProductRetriever and that the Host Name is www.dnb.com.

4. In the Symbolic URL Arguments list:

   a. Select the USERID record, and enter the user ID provided by D&B in the Argument Value field.

   NOTE: This field is not case-sensitive.

   ---

   b. Select the USERPSWD record, and enter the password provided by D&B in the Argument Value field.

5. From the Show drop-down list, select Host Administration.

6. In the HTTP Host list, make sure that there is a record where Name is www.dnb.com and Virtual Name is *reportserver*.

NOTE: If you are using Siebel eBriefings and want to enable a link from briefing documents to the D&B report ordering site, see *Siebel eBriefings Administration Guide*.

About Configuring D&B Integration

For general guidance on configuration, refer to Table 32.

Table 32. What to Configure?

If You Need to Customize the...	Then...
Single task server processes for D&B Update Manager (D&B) or D&B Update Manager (Siebel)	■ Edit the dnbmaps.sql file in the ...\siebelserver\SQLTEMPL directory. ■ Determine and make, if necessary, corresponding changes for account promotion.
Multiple task server processes for D&B Update Manager (D&B) or D&B Update Manager (Siebel)	■ Edit the dnbmaps.tsq file in the ...\siebelserver\SQLTEMPL directory. ■ Determine and make, if necessary, corresponding changes for account promotion.
Account promotion	■ Configure the maps listed in Table 38. ■ Determine and make, if necessary, corresponding changes in the update server processes.

A number of specific configuration topics are discussed in this section:

- Update Server Process Configuration
- Account Promotion and Prospect List Creation Configuration on page 463
- Running the D&B Update Manager (Siebel) Process Without Updating Account Name or Account Location on page 464

Update Server Process Configuration

The D&B update server processes use the Batch Real-Time Integration (RTI) technology and the RTI configuration files (dnbmaps.sql for single task and dnbmaps.tsq for multiple tasks). You can edit the RTI configuration files to suit your business requirements.

The general syntax of the RTI maps specified in the configuration files is as follows:

```
UPDATE_SOME_TABLE.MOD1TABLE = [Target Table to update]
UPDATE_SOME_TABLE.MOD1WHERE = [A WHERE clause]
UPDATE_SOME_TABLE.MOD1INSERT = [TRUE/FALSE]
UPDATE_SOME_TABLE.MOD1UPDATE = [TRUE/FALSE]
UPDATE_SOME_TABLE.MOD1DELETE = [TRUE/FALSE]
UPDATE_SOME_TABLE.MOD1SQL = [A Valid SQL Query]
```

The RTI configuration files are located in the ...\siebelserver\SQLTEMPL directory.

"Field Mapping for the D&B Update Manager Process" on page 466 lists the default mapping for the D&B Update Manager (Siebel) server component.

Use caution when making changes to these RTI configuration files. It is recommended that you engage a qualified professional for your customization process.

CAUTION: Do not change the default DELETE setting in the existing UPDATE* sections. Do not set DELETE to TRUE. If your business need necessitates deleting rows in the target table as part of the D&B Update Manager process, consult Siebel Professional Services for help with this customization process.

Account Promotion and Prospect List Creation Configuration

You can select specific fields that will be populated by the D&B promotion to a Siebel account or by the D&B list-creation process. These are controlled by maps in the business component user properties within the DNB Account and DNB Contact business components. These maps are listed in Table 38 on page 472.

Using Siebel Tools, you can change, add, or delete source and destination field mapping. Reference the map descriptions given in Table 38 on page 472 to determine which map to use for a given set of source and destination fields.

Use caution when making changes to these maps. It is recommended that you engage a qualified professional for your customization process.

CAUTION: Although the delete capability is available, it is recommended that you deactivate unwanted map entries instead of deleting them. This is safer and can be accomplished by checking or clicking the deactivate column for the undesired entry.

You can add an entry using the following syntax:

```
Name Column: [MAP NAME]: [DESTINATION FIELD]

Value Column: [D&B SOURCE FIELD]
```

NOTE: Each map works only with a specific Destination Business Component and a specific Source Business Component.

Running the D&B Update Manager (Siebel) Process Without Updating Account Name or Account Location

Depending on your business process, you may want to run the D&B Update Manager (Siebel) server component without updating the existing account names and account locations. This is done by editing the RTI configuration file.

TIP: When debugging in your test environment, increase the event log level to 4 to see more details in the log file. However, it is strongly recommended that you set the level to 1 (the default) when you run in a production environment in order to prevent the log file from overflowing. For information on event logging, see *Siebel Server Administration Guide*.

To edit the RTI configuration file so that account names are not updated

1. Open the RTI configuration file (dnbmaps.sql for single task or dnbmaps.tsq for multiple task) in a text editor.

2. Search for `UPDATE_SIEBEL_ACCOUNT.MOD1SQL` under the Oracle, Microsoft SQL Server, or DB2 SQL statements.

3. Search for `dnb.BUSINESS_NAME` within the `UPDATE_SIEBEL_ACCOUNT.MOD1SQL SELECT` statement.
4. Comment out the line that begins dnb.BUSINESS_NAME… as shown.

```
UPDATE_SIEBEL_ACCOUNT.MOD1SQL =

 SELECT acct.ROW_ID              ROW_ID,

;dnb.BUSINESS_NAME             NAME,
```

5. Save and close the file.

To edit the RTI configuration file so that account locations are not updated (single task)

1. Open the dnbmaps.sql file in a text editor.
2. Search for the `UPDATE_SIEBEL = UPDATE_SIEBEL_ADDR_PHY`… statement. This statement specifies the Siebel Table Groups to be updated when D&B Update Manager (Siebel) server component is run.
3. Within this statement, remove `COMMIT, UPDATE_SIEBEL_LOC1, COMMIT, UPDATE_SIEBEL_LOC2, COMMIT, UPDATE_SIEBEL_LOC3`.
4. Save and close the file.

To edit the RTI configuration file so that account locations are not updated (multiple task)

1. Open the dnbtask.cfg file in a text editor.
2. Under the `[Siebel]` section, comment out the line that begins Task5… as shown.

```
;;Task5 = UPDATE_SIEBEL_LOC1, COMMIT, UPDATE_SIEBEL_LOC2, COMMIT,
UPDATE_SIEBEL_LOC3
```

3. Save and close the file.

Field Mappings for Configuration of D&B Integration

This section provides field mapping information for three types of D&B integration processes:

- Field Mapping for the D&B Update Manager Process
- Field Mapping for D&B Real-Time Updates
- Field Mapping for Account Promotion and Prospect Lists

Field Mapping for the D&B Update Manager Process

D&B Update Manager (D&B) server component. For the table mapping for the D&B Update Manager (D&B) component, examine the appropriate tables (Figure 19 on page 450) using Siebel Tools. The default field mappings can be determined by examining the UPDATE_DNB* sections of the RTI configuration file (dnbmaps.sql or dnbmaps.tsq).

D&B Update Manager (Siebel) server component. When the D&B Update Manager (Siebel) server component is run (Figure 20 on page 451), the fields listed in Table 33, Table 34 on page 468, and Table 35 on page 468 are mapped. The field mappings can also be determined by examining the UPDATE_SIEBEL* sections of the RTI configuration file.

For information about changing these default mappings, see "Update Server Process Configuration" on page 462.

Table 33. S_DNB_ORG Table Mapping for D&B Update Manager (Siebel)

From Column	To Table	To Column
DUNS_NUM	S_ORG_EXT	DUNS_NUMBER
BUSINESS_NAME	S_ORG_EXT	NAME
TRADESTYLE	S_ORG_SYN	NAME
SCND_TRADESTYLE	S_ORG_SYN	NAME
PHYS_STREET_ADDR	S_ADDR_ORG	ADDR
SECOND_STREET_ADDR	S_ADDR_ORG	ADDR

Table 33. S_DNB_ORG Table Mapping for D&B Update Manager (Siebel)

From Column	To Table	To Column
PHYSICAL_CITY	S_ADDR_ORG	CITY
PHYSICAL_STATE	S_ADDR_ORG	PROVINCE or STATE
PHYSICAL_ZIP	S_ADDR_ORG	ZIPCODE
COUNTRY_NAME	S_ADDR_ORG	COUNTRY
COUNTY_NAME	S_ADDR_ORG	COUNTY
MAIL_ADDRESS	S_ADDR_ORG	ADDR
MAIL_ADDRESS_2	S_ADDR_ORG	ADDR
MAIL_CITY	S_ADDR_ORG	CITY
MAIL_STATE	S_ADDR_ORG	STATE
MAIL_ZIP	S_ADDR_ORG	ZIPCODE
TELEPHONE	S_ORG_EXT	PH_NUM
FAX_NUMBER	S_ORG_EXT	FAX_PH_NUM
ANNL_SLS_AMT	S_ORG_EXT_X	ATTRIB_14
CURRENCY_CODE	S_ORG_EXT	BASE_CURCY_CD
EMPLOYEES_TOTAL	S_ORG_EXT_X	ATTRIB_26
EMPLOYEES_HERE	S_ORG_EXT	EMP_COUNT
YEAR_STARTED	S_ORG_EXT_X	ATTRIB_27
LOC_TYPE_STAT_IND	S_ORG_EXT	included in LOC
PUBLIC_PRIVATE_IND	S_ORG_EXT_X	ATTRIB_08
GLBLULT_DUNS_NUM	S_ORG_EXT	GLBLULT_DUNS_NUM
DOM_ULT_DUNS_NUM	S_ORG_EXT	DOM_ULT_DUNS_NUM
PAR_DUNS_NUM	S_ORG_EXT	PAR_DUNS_NUM
LINE_OF_BUSINESS	S_ORG_EXT_X	ATTRIB 03
PCT_GROWTH_SLS_3YR	S_ORG_EXT_X	ATTRIB_15

The S_PRSP_CONTACT table contains information about the D&B contacts such as the name of the CEO and various company executives. D&B provides up to four contacts per D&B account.

Table 34. S_PRSP_CONTACT Table Mapping for D&B Update Manager

From Column	To Table	To Column
LAST_NAME	S_CONTACT	LAST_NAME
FST_NAME	S_CONTACT	FST_NAME
MID_NAME	S_CONTACT	MID_NAME
PER_TITLE	S_CONTACT	PER_TITLE
PER_TITLE_SUFFIX	S_CONTACT	PER_TITLE_SUFFIX
JOB_TITLE	S_CONTACT	JOB_TITLE
SEX_MF	S_CONTACT	SEX_MF

The S_DNB_ORG_SIC table contains the Standard Industrial Classification (SIC) code developed by the US Government. The code is assigned to businesses and other organizations by classifying and subdividing the activity performed by that establishment at that location. D&B provides up to six SICs per D&B account. In the D&B Update Manager process, the primary SIC code is mapped to the S_INDUST table and all SIC codes are mapped to the S_ORG_INDUST table.

Table 35. S_DNB_ORG_SIC Table Mapping for D&B Update Manager

From Column	To Table	To Column
ROW_ID	S_INDUST	PR_INDUST_ID
	S_ORG_INDUST	INDUST_ID

Table 36 describes how address and contact information is updated by the D&B Update Manager (Siebel) process.

Table 36. Update Rules for Addresses and Contacts

If This D&B Information Changes...	Then...
Street address City (Abbreviated) state	A new address record is added to the Address table.
Address information other than street address, city, or state	The address record is updated in the Address table.
Phone number Fax number	The address record is updated in the Address table.
Contact first name or Contact last name	A new contact record is added to the Contact table.
Contact information other than first or last name	The contact record is updated in the Contact table.

Field Mapping for D&B Real-Time Updates

When you purchase account information through the D&B Web site using the D&B real-time search and update feature in the Siebel application, certain fields in the Siebel business components are populated. These fields are a subset of the fields that are populated by the D&B Update Manager (D&B) server component. For example, D&B does not provide the contact first, last, and middle names fields in the real-time update.

Table 37 lists the fields that may be populated or updated when you purchase account information using the D&B real-time search and update feature.

Table 37. Fields Populated by D&B Real-Time Search and Update

D&B WorldBase Marketing Plus with Linkage	Siebel *Business Component Name.Field Name*
Business Structure Code (Location Type)	DNB Account.Location Type
Domestic Ultimate Name	DNB Account.Domestic Ultimate Business Name
Global Ultimate Name	DNB Account.Global Ultimate Business Name
Parent/HQ Business Name	DNB Account.Parent HQ Name
Physical State	DNB Account.State Name
Business Name	DNB Account.Business Name
Trade Style	DNB Account.Trade Style
Street Address	DNB Account.Physical Address
Mail Address	DNB Account.Mail Address
City Name	DNB Account.Physical City
Mail City Name	DNB Account.Mail City
Physical State/Province Abbreviation	DNB Account.Physical State
Mailing State/Province Abbreviation	DNB Account.Mail State
ZIP/Postal Code	DNB Account.Physical Zip
Mail Postal/ZIP Code	DNB Account.Mail Zip
Country Name	DNB Account.Country Name
D&B D-U-N-S Number	DNB Account.DUNS Number
Telephone Number	DNB Account.Main Phone 2
Cable/Telex Code	DNB Account.Cable Telex Number
Facsimile Number	DNB Account.Main Fax 2

Table 37. Fields Populated by D&B Real-Time Search and Update

D&B WorldBase Marketing Plus with Linkage	Siebel *Business Component Name.Field Name*
National ID	DNB Account.National Identification Number 2
SIC Code	DNB Account.SIC Code
Primary Local Activity Code	DNB Account.Primary Local Activity Code
Year Started	DNB Account.Year Started 1
Employees Here	DNB Account.Employee Here
Employees Total	DNB Account.Employee Total
Annual Sales US Dollars	DNB Account.Sales Volume
Annual Sales Local	DNB Account.Annual Sales Local Currency
Legal Status	DNB Account.Legal Status
Subsidiary Code	DNB Account.Subsidiary Indicator
Import / Export / Agent Ind.	DNB Account.Import Export Code
Global Ultimate D&B D-U-N-S Number	DNB Account.Global Ultimate DUNS
Global Ultimate Indicator	DNB Account.Global Ultimate Indicator
Global Ultimate WorldBase Country Code	DNB Account.Global Ultimate Country Code
Domestic Ultimate D&B D-U-N-S Number	DNB Account.Domestic Ultimate DUNS
Headquarter/Parent D&B D-U-N-S Number	DNB Account.Parent HQ DUNS
HQ/Parent WorldBase Country Code	DNB Account.Parent/HQ Country Code

Field Mapping for Account Promotion and Prospect Lists

When end users promote D&B accounts or create prospect lists from the D&B screen, fields in the DNB Account and DNB Contact business components are mapped to fields in other business components. These maps are listed in Table 38 and can be viewed in detail in the Business Component User Properties window of Siebel Tools.

For information about promoting accounts and creating prospect lists, see *Siebel Sales User Guide*.

Table 38. Maps of D&B to Siebel Fields for Promotion and List Creation

User Property Prefix and Map Name	D&B Source Business Component	Siebel Destination Business Component	Process and Description
Account Map	DNB Account	Account	Promotion Specifies the fields in DNB Account that will be copied to Account business component
Contact Map	DNB Contact	Contact	Promotion Specifies the fields in DNB Contact that will be copied to Contact business component
Mailing Address Map	DNB Account	Business Address	Promotion Specifies the mailing address fields in DNB Account that will be copied to Business Address
Physical Address Map	DNB Account	Business Address	Promotion Specifies the physical address fields in DNB Account that will be copied to Business Address
Prospect Info Map	DNB Contact	List Mgmt Prospective Contact	Create Prospect List Specifies the biological information (such as last name, first name, and so forth)
Prospect Contact Info Map	DNB Account	List Mgmt Prospective Contact	Create Prospect List Specifies the contact information (such as company, address, phone number, and so forth) fields in the DNB Account that will be copied into the List Mgmt Prospective Contact

19 Integration Using ASIs

ASIs allow you to integrate Siebel applications with other applications in real time.

The Accounts, Contacts, or Households screens use ASIs to exchange data with any external system such as a back-office application. These are listed in Table 39.

You must set up these ASIs shipped with your Siebel application before they can be used. This chapter provides the procedures that you must perform to set up these ASIs. Depending on your business needs, you may choose to set up ASIs and activate workflows for some or all of the GUI commands listed in Table 39.

For general information about ASIs, see *Application Services Interface Reference*.

Table 39. ASIs for Accounts, Contacts, and Households

Screen	GUI Command	Workflow	Outbound and Inbound ASI Pairs	End-User Information
Accounts	Update External System	Synchronize Account ASI	External Account Siebel Account	*Siebel Call Center User Guide* *Siebel Sales User Guide*
Accounts (Credit Profile view)	Refresh	Get Account ASI		
Contacts	Update External System	Synchronize Contact ASI	External Contact Siebel Contact	*Siebel Call Center User Guide* *Siebel Sales User Guide*
Households	Update External System	Synchronize Household ASI	External Household Siebel Household	*Siebel Call Center User Guide*

Setting Up Account, Contact, and Household ASIs

This section describes how to set up the prebuilt ASIs for Accounts, Contacts, and Households:

1. **Set up outbound and inbound Web services.** See Setting Up Web Services for Account, Contact, and Household ASIs.

2. **Activate workflows.** See Activate Workflows for Account, Contact, and Household ASIs on page 476.

Other tasks you may want to perform are:

- **Extending ASIs.** See *Application Services Interface Reference*.

- **Deactivating fields in the ASIs.** See *Application Services Interface Reference*.

- **Customizing ASI workflows.** See *Siebel Business Process Designer Administration Guide*.

Setting Up Web Services for Account, Contact, and Household ASIs

To set up the Web services, you must set up both outbound and inbound Web services for the ASIs. The procedures below show you the steps required for each ASI.

To set up an outbound Web service

1. From the application level menu, choose View > Site Map > Web Services Administration > Outbound Web Services.

2. In the Outbound Web Services list, create a query to display the record with External Account, External Contact, or External Household in the Name field.

3 Verify that the fields in the Outbound Web Services list match those in the following table.

Namespace	Name	Status
http://siebel.com/asi/	*One of the following:* External Account External Contact External Household	Active

4 In the Service Ports list, click New, and enter the following values in the fields of the new record.

Field	Comments
Name	Enter a name for the port.
Port Type	Enter External Account, External Contact, or External Household.
Transport	Select from the drop-down list.
Address	When you select a transport, the field will be populated with a template address. Edit the address based on where you are sending the data.
Binding	If a SOAP header is expected by the receiving application, select SOAP_RPC.

To set up an inbound Web service

1 From Show drop-down list, select Inbound Web Service.

2 In the Inbound Web Service list, create a query to display the record with Siebel Account, Siebel Contact, or Siebel Household in the Name field.

3 Verify that the fields in the Inbound Web Services list match those in the following table.

Namespace	Name	Status
http://siebel.com/asi/	*One of the following:* Siebel Account Siebel Contact Siebel Household	Active

4 In the Service Ports list, review the information in the fields for the service port and make any changes required for your system.

5 In the Operations list, review the information shown and make any changes required for your system.

Activate Workflows for Account, Contact, and Household ASIs

You must activate the following workflow processes used for real-time integration of account, contact and household data:

- Synchronize Account ASI
- Get Account ASI
- Synchronize Contact ASI
- Synchronize Household ASI

For a description of these workflows, see "ASI Workflow Descriptions" on page 478.

To activate workflows used by Account, Contact, and Household ASIs

1 From the application level menu, choose View > Site Map > Business Process Administration > Workflow Processes.

2 In the Workflow Processes list, use a query to find all processes where the Name field contains the word ASI. You can query on *ASI*.

3 For the workflows listed above, activate each workflow process that has the status Inactive.

   a Select the workflow process record.

   b Click Revise.

   A copy of the workflow process record is created with a status of In Progress. The copy is automatically selected.

   c Click Activate.

   d Verify that the Status is Active.

4 When you are finished activating the workflow processes, restart the server.

For more information about workflow processes, see *Siebel Business Process Designer Administration Guide*.

ASI Workflow Descriptions

This section describes the workflow processes that are used to invoke the ASIs for account processes.

It is not necessary to modify these workflows, but you can modify them to suit your business model.

Synchronize Account ASI

This workflow submits the account information to the outside system to synchronize the information between the two systems.

- Query For Account By Id: Queries for the account on the current system using the object ID. Returns an account property set containing the account information.
- External Account Proxy: Calls the Synchronize method on the outside system, passing in the account property set. This step returns an account property set, which will contain any changes the outside system made to the account.
- Synchronize Account: Takes the account property set returned by the previous step and synchronizes it with the account in the current system.

Synchronize Contact ASI

The Synchronize Contact ASI process is essentially the same as the Synchronize Account ASI process, except that contact replaces account.

Synchronize Household ASI

The Synchronize Household ASI process is essentially the same as the Synchronize Account ASI process, except that household replaces account.

Get Account ASI

This workflow queries the outside system to retrieve the latest information on the account. It returns the new information and synchronizes the account on the current system.

- Query Account By Id: Queries for the account on the current system using the object ID. Returns an account property set containing the account information.

- Isolate Integration Id: In the next step, the workflow uses a query by example. Query by example takes the property set and looks for an account with exactly the same values for the fields in the property set. If the account has changed on the outside system, those values will no longer match. The workflow needs to query by a value that does not change, that is, the integration ID. Isolate Integration Id takes in a property set and removes all the fields, except the integration ID.
- External Account Proxy: Using the property set, which only has an integration ID now, this step queries by example on the outside systems. Once it finds the account with that integration ID, it returns an account property set containing the account information.
- Synchronize Account: Takes the account property set returned by the previous step and synchronizes it with the account in the current system.

System Preferences A

Table 40 lists the system preferences provided throughout your Siebel applications. For information about how to change system preferences, see Chapter 3, “Ongoing Application Administration Tasks.”

Table 40. System Preferences

Preference	Description
Alarm Manager Load Frequency	Number of minutes the system waits before rechecking for alarms. Default: 60
AllocationRule	Substitution rule specified by value. Specify “1”, “2”, or “3” to control substitution behavior: ■ Always allocate a substitute before going to the next inventory location. ■ Allocate a substitute only if it allows shipment from a single inventory location. ■ Never allocate a substitute if the exact product can be found in another inventory location. For more information, see *Siebel Field Service Guide*.
Always Show Message Bar Alerts	This system preference has no effect.
Auto Mgr Calendar Access	Allow employee’s manager access to the employee’s calendar, even if the employee does not explicitly give the manager access. *Note:* If multiple employees share a position, only the calendar of the primary employee is accessible. Default: True

Table 40. System Preferences

Preference	Description
BucketAvailCDtobeCounted	Valid values for the buckets' availability code. The values should be selected from the Bucket Availability Code LOV, comma separated, and individual values should be language independent values (LIVs). Values must be delineated with single quotes, such as 'On Hand'. For more information, see *Siebel Field Service Guide*.
BucketStatusCDtobeCounted	Valid values for the buckets' status code. The values should be selected from the Bucket Status Code LOV, comma separated, and individual values should be language independent values (LIVs).Values must be delineated with single quotes, such as 'Good'. For more information, see *Siebel Field Service Guide*.
CSM Logging	Enables logging of merge transactions. Merge transactions are created when connected users combine or merge two or more business components such as accounts or opportunities into one. Information from this log can be used to relink orphaned records created when the merge process is crossed with an update process during a synchronization. This is only applicable if the installation uses Siebel Remote or Replication Manager. Default: False
DB2: Default Opt Level	Default optimization level which defines the optimizing algorithm that DB2 will use to execute SQL statements.
DBX Vis Rules per Statement 1	Number of visibility or routing rules checked per SQL statement processed by the Database Extract component for the first SQL statement with header information.
DBX Vis Rules per Statement N	Number of visibility or routing rules checked per SQL statement processed by the Database Extract component for other SQL statements.
Default Campaign Source Code	Default campaign for Web offers used in Siebel eMarketing. All offers that are a part of the default campaign will appear in the Featured Offers Applet in Siebel eMarketing.
Default Offer Code	Code to track the click path of a customer on the eMarketing Web site who does not select a specific offer.

Table 40. System Preferences

Preference	Description
Default Time Zone	Default time zone for all users of that database. When a user logs in, the Time Zone field of the User business component is checked. If it is empty, the Default Time Zone system preference is checked. Default: UTC
DefaultFulfillInvloc	Value that represents the default inventory location to use as a source inventory location for the Fulfillment Engine and Part Locator. Used as the Source Inventory Location if the user does not specify a Source Inventory Location at run time. The value must be the Row ID of the service inventory location. To find this ID, use the following procedure: 1. In any Service Inventory view, select an inventory location. 2. From the Help menu, select About Record. 3. In the dialog box, click Details. The Row # field contains the Row ID. For more information, see *Siebel Field Service Guide*.
Docking: Get All PostnCon rows	Enables the Transaction Router and Database Extract component to get *all* records in S_POSTN_CON table for a contact. Use this parameter to improve Siebel Remote performance. For more information, see *Siebel Remote and Replication Manager Administration Guide*. Default: False
Docking: Transaction Logging	Enables docking transaction logging. For more information, see *Siebel Remote and Replication Manager Administration Guide*. Default: False
eAuc:AllowTimeStampAdvantage	Give an advantage to a bid based on when the bid was made. Default: True
eAuc:AsyncNoticeCalls	Invoke notice workflows through asynchronous request manager. Default: False
eAuc:AuctionURLRoot	The URL placed in email messages for auction events. Default: http://www.<yourDomain>.com

Table 40. System Preferences

Preference	Description
eAuc:AutoApproveBidder	Automatically approve a user's request to become a bidder. Default: True
eAuc:AutoApproveLister	Automatically approve a user's request to become a lister. Default: True
eAuc:AutobidToReservePrice	When a bid is placed, if it does not meet an auction's reserve price and the bid has an AutoBid amount, then automatically adjust the bid to come as close to or match the reserve price. Default: False
eAuc:BidIncrementMultiple	A floating point number that determines the minimum monetary unit increment (or decrement) for bids. Default: 0.01
eAuc:BidIncrMultipleTolerance	A floating point number between 0 and 0.005 which specifies the allowed deviation from an exact multiple of the eAuc:BidIncrementMultiple property. This provides accommodation for math rounding errors that could result if the BidIncrementMultiple is set to certain problematic number values (such as 0.17).Default: 0.005
eAuc:BidTimeTieBreakOption	Preference specified as either 1, 2, or 3: ■ If 1, then users who have prior winning bids have their follow-up bids time-stamped to the time of the prior winning bid. ■ If 2, then users who have placed any prior bid have their follow-up bids time-stamped to the time of the prior bid. ■ If 3, new and replacement bids and AutoBids are time-stamped when placed Default: 1
eAuc:DynamicCloseEnabled	Allow extending an auction past its posted end time according to its dynamic close properties.
eAuc:DynamicCloseMaxDelay	The maximum number of minutes an auction's end time can be delayed because of dynamic close extensions. (Works in conjunction with eAuc:DynamicCloseEnabled set to True.) Default: 60

Table 40. System Preferences

Preference	Description
eAuc:EnforceExactBidIncrement	Enforce bids to be exact multiples of an auction's bid increment (or decrement). Default: True
eAuc:MaxMoneyValueAccepted	The maximum monetary value accepted for an auction's starting price, an auction's bid increment (or decrement), a bid, or a lister fee. Default: 1000000000
eAuc:MaxRatingsPerSale	The number of times a user is allowed to rate another user per auction. This property applies to both bidders and listers.Default:2
eAuc:MaxThirdPartyListingDays	The maximum number of days between a third-party auction's start and end times Default:14.
eAuc:Notice Wf-Auction Alert	Name of workflow process used to notify user that an Auction Alert has triggered. Default: eAuction Alert Notice
eAuc:Notice Wf-Autobid	Name of workflow process used to notify user that they have successfully registered to participate in auctions. Default: eAuction Autobid Notice
eAuc:Notice Wf-Bid	Name of workflow process used to notify Bidder that they have placed an acceptable bid. Default: eAuction Bid Notice
eAuc:Notice Wf-ListerBidAccept	Name of workflow process used to notify Lister that a Bid has been placed on one of their Items. Default: eAuction Bid Accepted Notice
eAuc:Notice Wf-ListerClose	Name of workflow process used to notify Lister that their Auction has closed. Default: eAuction Lister Close Notice
eAuc:Notice Wf-ListerInvoiced	Name of workflow process used to notify Lister that their Auction has been invoiced. Default: eAuction Lister Invoiced Notice

Table 40. System Preferences

Preference	Description
eAuc:Notice Wf-Outbid	Name of workflow process used to notify Bidder that they have been outbid. Default: eAuction Outbid Notice
eAuc:Notice Wf-PartialOutbid	Name of workflow process used to notify Bidder that they have been outbid on some number of items. Default: eAuction Partially Outbid Notice
eAuc:Notice Wf-UserStatus	Name of workflow process used to notify User of their status. Default: eAuction User Status Notice
eAuc:Notice Wf-UserWelcome	Name of workflow process used to notify User that they have been accepted into an auction. Default: eAuction User Welcome Notice
eAuc:Notice Wf-Winner	Name of workflow process used to notify Bidder that they have won. Default: eAuction Win Notice
Entitlement: Verify Consumer	Check the authorization of the contact requesting service. If preference is set to `TRUE`, the entitlements displayed must meet *one* of these criteria: ■ The contact for the entitlement matches the service request contact. ■ The entitlement account is set to All Contacts, and the entitlement account matches the service request account or the account for the contact for the service request. If no contact is selected, Siebel Field Service tries to verify the entitlement using the other entitlement settings. For more information, see *Siebel Field Service Guide*.
Entitlement: Verify Dates	Check that the service request falls within the time span of the entitlement. If the preference is set to `TRUE`, then the entitlements displayed are only those that provide coverage on the date the service request was opened: a date between the start and end dates for the entitlement. If the entitlement has no start or end date, it is not displayed. For more information, see *Siebel Field Service Guide*.

Table 40. System Preferences

Preference	Description
Entitlement: Verify Product	Check that the asset or product is entitled to service. If the preference is set to TRUE, the agreements displayed must meet *one* of these criteria: ■ The entitlement asset matches an asset in the service request. ■ The entitlement product matches a product in the service request (no asset or serial number specified). ■ The entitlement is set to All Products and the product or asset for the entitlement matches the product or asset for the service request. If no product is selected, Siebel Field Service tries to verify the entitlement using the other Entitlement settings. For more information, see *Siebel Field Service Guide*.
ETL Analysis End ETL Analysis Start ETL Date Format	ETL Date format indicates the way dates need to be interpreted. The other two parameters mention the date range for which the Exchange Rates will be adjusted. This does not indicate that only the data created within this range will be extracted. Select the earliest date for the Analysis Start Date—that is, when the transactions may have begun. In addition to considering the created and modified dates, consider other relevant dates such as order date. Setting this to an early value such as 19700101 (January 1, 1970) does not affect the processing time. A similar logic applies for choosing Analysis End Date. Note that the values need to be entered in the format defined by ETL Date Format. Default Analysis End: 20101231 Default Analysis Start: 19940101 Default Date Format: YYYYMMDD.
ETL Base Exchange Currency	Currency in which all the financial data will be converted. While the OLTP supports transactions in many different currencies, the data in the OLAP is converted to a single currency for analysis purposes. The Exchange rates are derived from the Exchange Rates table in the OLTP. Default: USD.
ETL Default Continent	Value for any address that does not have Continent defined. Set this to a value, which will be used if the value of Continent is not defined in the OLTP. Default: North America.

Table 40. System Preferences

Preference	Description
ETL Default Country	Value for any address that does not have the Country defined. Set this to a value, which will be used if the value of Country is not defined in the OLTP. Default: USA.
ETL Default Currency	Value for currency code that will be used if the currency code for a specific financial transaction is not set. Default: USA.
ETL Default Language	Language code used when language translation occurs when looking up the List of Values table. Default: ENU.
ETL LOV Maximum Value ETL LOV Minimum Value	In some fields, bucketing of values happens. Instead of saying the number of employees at an account is 45, 96, the values can be bucketed to 0-50, 50-100 and so on. In the List of Values, if the minimum and maximum values are not specified, the values of these parameters will be used. Defaults: 9999999999 and 0.
ETL Unknown Exchange Rate	Value used when an exchange rate for a currency to the Datamart Default Currency is undefined in the OLTP. Default: 1.
Forecast: Auto-Forecast	Creates subordinates' forecasts to be used in a rollup forecast, if the subordinates have not created forecasts themselves.
Forecast: Use Server Task	Send forecast processing requests to the Siebel Server for batch processing. If the value is False, requests are processed locally.
FSDB:Override Service Region	Maximum monetary value accepted in Auction Item, Bid, and Fee currency fields.
FSPrevMnt: Def Act Owner ID	The value of this system preference is used when creating activities from a template in which the activity owner (Employees) has not been defined. The value specified should be the ROW_ID of the desired employee. For more information, see *Siebel Field Service Guide*.

Table 40. System Preferences

Preference	Description
FSPrevMnt: Default Org ID	ROW_ID of the default organization. This default organization is stamped on generated service requests when the asset for which the service request is being generated does not have a specified account. If the owner account is specified for the asset, then the account's BU_ID is used. For more information, see *Siebel Field Service Guide*.
InventoryTypeForPT	Inventory location type. The values should be from the Inventory location type LOV and individual values should be any of the language independent values (LIVs). For more information, see *Siebel Field Service Guide*.
InvLocTypeForReplenishRelation	Default replenishment level. Orders to replenish any level of an inventory location have this value as their Destination.Value should be from the Inventory Location Type LIV. For more information, see *Siebel Field Service Guide*.
LOGMGR:Vis Rules per Statement	Set to 50 by default. For implementations that use any database other than Oracle, you should change this value to 20.
MRG:Docking Timestamp Source	Specifies whether the timestamp is based on the time a change was made on the client or on the server. For more information, see *Siebel Remote and Replication Manager Administration Guide*.
MRG:System Conflict Resolution	Sets the rule to be used for resolving database update conflicts. The rule may be either Server Wins (the default) or Client Wins. For more information, see *Siebel Remote and Replication Manager Administration Guide*.
MRG:Txns per Commit	Number of database transactions the Transaction Merger processes before it issues a database commit. Setting a low value (1) reduces the frequency with which users encounter a locked database row and reduces the risk of deadlock. Setting a high value (10) minimizes processing overhead. For more information, see *Siebel Remote and Replication Manager Administration Guide*. Default DB2: 10. Default Microsoft SQL Server: 1. Default Oracle: 1.

Table 40. System Preferences

Preference	Description
MRG:User Friendly Notification	Determines whether Siebel Remote writes information about database updates to the Siebel Remote Status view on the Mobile Web Client. If the value is TRUE, Siebel Remote writes information about database updates. If the value is CONFLICTS, Siebel Remote writes information about database updates that caused conflicts. If the value is FALSE, Siebel Remote does not write any information about database updates. For more information, see *Siebel Remote and Replication Manager Administration Guide*.
OrderItemStatusForOnOrderQty	Specifies the valid values for the existing order item status. The values should be from the Order Item Status LOV and individual values should be language independent values (LIVs). For more information, see *Siebel Field Service Guide*.
OrderItemStatusToBeFulfilled	Specifies the valid values for Order Item Status. The values are from the Order Item Status LOV and the individual values are language independent values (LIVs). For more information, see *Siebel Field Service Guide*.
OrderStatusForOnOrderQty	Specifies the valid values for the existing order status. The values should be from the Order Status LOV and individual values should be LIVs. For more information, see *Siebel Field Service Guide*.
OrderStatusToBeFulfilled	Specifies the valid values for Order Status. The values should be from the Order Status LOV and individual values can be any of the language independent values (LIVs). For more information, see *Siebel Field Service Guide*.
OrderTypeForOnOrderQty	Specifies the valid values for the existing order type. The values should be from the Order Type LOV and individual values should be language independent values (LIVs). For more information, see *Siebel Field Service Guide*.
OrderTypeToBeFulfilled	Specifies the valid values for Order Type. The values should be from the Order Type LOV and individual values can be any of the language independent values (LIVs). For more information, see *Siebel Field Service Guide*.

Table 40. System Preferences

Preference	Description
ReplenishOrderPriority	Specifies the default order priority. The values should be from the Order Priority LOV and individual values should be language independent values (LIVs). For more information, see *Siebel Field Service Guide*.
Satmetrix Key Value	A string provided by Satmetrix to customers of Siebel Satmetrix eSurveys. Required for generating encrypted tokens that are part of URLs for displaying survey reports.
Sch:Break Time Id	Specifies the Row ID of the work type to be used when calculating the schedule cost where activities contain breaks. The default value is -1. To find the Row ID, navigate to the Application Administration screen > Work Type Administration view, select the record, choose About Record from the Help menu, and note the Row # value.
Sch:Default Constraint Set	Specifies the Row ID of the constraint set to be used where no constraint set is associated with the service region loaded. The default value is -1. To find the Row ID, navigate to the Scheduling Administration screen > Constraint Sets view, select the record, select About Record from the Help menu and note the Row # value.
Sch:Default Cost Function	Specifies the Row ID of the cost function to be used where no cost function is associated with the service region loaded. The default value is -1. To find the Row ID, navigate to the Scheduling Administration screen > Cost Functions view, select the record, select About Record from the Help menu and note the Row # value.
Sch:Default Parameter Set	Specifies the Row ID of the parameter set to be used where no cost function is associated with the service region loaded. The default value is -1. To find the Row ID, navigate to the Scheduling Administration screen > Parameter Sets view, select the record, select About Record from the Help menu and note the Row # value.

Table 40. System Preferences

Preference	Description
Sch:Default Time Window	Specifies the Row ID of the time window to be used where no cost function is associated with the service region loaded. The default value is -1. To find the Row ID, navigate to the Scheduling Administration screen > Time Window view, select the record, select About Record from the Help menu and note the Row # value.
SecExternalUserAdministration	An entry of FALSE allows administration of the directory through the Siebel application. For more information, see *Security Guide for Siebel eBusiness Applications*.
SecThickClientExtAuthent	Allow changes to user data done on the dedicated client to propagate to the directory. Set this parameter to TRUE only on the dedicated Web client. For more information, see *Security Guide for Siebel eBusiness Applications*.
Security Adapter CRC	Calculate the checksum value for your security adapter DLL, and enter the calculated value here. For more information, see *Security Guide for Siebel eBusiness Applications*.
SM WebIntelligence Server	The URL that points to the Web Intelligence server that serves up reports for Siebel Analytics.
SqlStyle	Indicate which SQL statements are to be used with this implementation—Oracle, Microsoft SQL Server, Informix, or Sybase. Case-sensitive.
SubSqlStyle	An SQLStyle that falls within a family of similar database products.
Technical Support (Alt. 1)	Specifies the telephone numbers to display in the Siebel Technical Support dialog box. Update this number to match your internal help desk number. The alternate numbers (Alt. 1 and Alt. 2) provide expansion for pager numbers and email addresses. Set a value to None to leave it blank in the dialog box.
Technical Support (Alt. 2)	Specifies the telephone numbers to display in the Siebel Technical Support dialog box. Update this number to match your internal help desk number. The alternate numbers (Alt. 1 and Alt. 2) provide expansion for pager numbers and email addresses. Set a value to None to leave it blank in the dialog box.

Table 40. System Preferences

Preference	Description
Technical Support (FAX)	Specifies the fax number to display in the Siebel Technical Support dialog box. Update this number to match your internal help desk fax number. Set a value to None to leave it blank in the dialog box.
Technical Support (URL)	Specifies the support URL to display in the Siebel Technical Support dialog box. Update this URL to match your internal help desk Web address. Set a value to None to leave it blank in the dialog box.
Technical Support (Voice)	Specifies the voice number to display in the Siebel Technical Support dialog box. Update this number to match your internal help desk number. Set a value to None to leave it blank in the dialog box.
Universal Time Coordinated	Turns on global time zone support for the entire system. Set this preference to TRUE to enable global time zone support. The default setting is TRUE. Note: This is a one-time setting. Once you have turned on global time zone support in a production environment, you should not turn it off. If you intend to operate your deployment with the Global Time Zone feature enabled, you must also set the operating system of your database servers to UTC time, or its equivalent. Failure to set the OS to UTC when the UTC parameter is set to TRUE will result in asynchronous server request errors. For more information on enabling Global Time Zone, see *Global Deployment Guide*. Although enabling this feature is optional, it is strongly recommended that you operate your production environment with Global Time Zone enabled.

Content Center Reference B

This appendix provides detailed information on two subjects:

Prebuilt Content Objects for Content Center

Each Content Object is based on a business object that was derived from an existing business object by removing unnecessary fields. You can modify these content objects according to your business needs.

Table 41 lists each content object, the primary business object on which it is based, and its primary business component.

Table 41. Prebuilt Content Objects

Content Object	Business Object	Primary Business Component
Catalog Content Object	Product Catalog (Content Management)	Product Catalog
Catalog Category Content Object	Catalog Category (Content Management)	Catalog Category Admin
ContentBase Content Asset Content Object	ContentBase Asset EAI	ContentBase Asset (Content Management)
ContentBase Content Set Content Object	ContentBase Content Set EAI	ContentBase Content Set (Content Management)
ContentBase Content Type Content Object	ContentBase Content Type EAI	ContentBase Content Type (Content Management)
ERM Group News Item Content Object	ERM Group News Item EAI	ERM Group News Item EAI
Literature Content Object	Admin Sales Tool (Content Management)	Admin Sales Tool
Microsite Management Page Content Object	ePortal MM Page EAI	ePortal MM Page EAI
Microsite Management Page Item Content Object	ePortal MM Page Item EAI	ePortal MM Page Item EAI
Price List Content Object	Price List (Content Management)	Price List
Product Content Object	Product Admin Definition (Content Management)	Internal Product

Table 41. Prebuilt Content Objects

Content Object	Business Object	Primary Business Component
Product Class Content Object	XA Authoring Object	XA Class
Product Feature Content Object	Product Feature (Content Management)	Product Feature
Product Line Content Object	Admin Product Line (Content Management)	Admin Product Line
Resolution Item Content Object	Resolution Item	SR Resolution Item
Solution Content Object	Solution	Solution
Volume Discount Content Object	Volume Discount (Content Management)	Volume Discount

The tables below describe the data that is transferred for each business component that is included in the content object.

Catalog Content Object

Catalog is a prebuilt content object based on the business object Product Catalog (Content Management). Table 42 lists the business components for the prebuilt content object Catalog.

Table 42. Prebuilt Content Object: Catalog

Business Components	Transferred Data	Links
Product Catalog	Catalog Information	Primary
Product Catalog Translation	Language Translations of Catalog Information	Product Catalog/Product Catalog Translation

Catalog Category Content Object

Catalog Category is a prebuilt content object based on the business object Catalog Category. Table 43 lists the business components for the prebuilt content object Catalog Category.

Table 43. Prebuilt Content Object: Catalog Category

Business Components	Transferred Data	Links
Catalog Category	Catalog Category	Primary
Catalog Subcategory	Association relationships	Catalog Category/Catalog Subcategory
Internal Product	Association relationships	Catalog Category/Internal Product

ContentBase Content Asset Content Object

ContentBase Content Asset is a prebuilt content object based on the business object ContentBase Asset EAI. Table 44 lists the business components for the prebuilt content object Content Asset.

Table 44. Prebuilt Content Object: ContentBase Content Asset

Business Components	Transferred Data	Links
ContentBase Asset (Content Management)	ContentBase Asset identity	Primary
ContentBase Asset (Content Management)_Access Group	ContentBase Access Group relationship	
ContentBase Asset (Content Management)_Current Version	ContentBase Asset current version identification	
ContentBase Version (Content Management)	Asset revision information	ContentBase Asset (Content Management)/ ContentBase Version (Content Management)
ContentBase Data (Content Management)	Content stored in database repository	ContentBase Version (Content Management)/ContentBase Data (Content Management)

Table 44. Prebuilt Content Object: ContentBase Content Asset

Business Components	Transferred Data	Links
ContentBase Namespace Aliases (Content Management)	XML namespace information	ContentBase Version (Content Management)/ContentBase Namespace Aliases (Content Management)
ContentBase Version File Attachment (Content Management)	Content stored in file system	ContentBase Version (Content Management)/ContentBase Version File Attachment (Content Management)
ContentBase Version for Version Children	Asset version interrelations	ContentBase Asset (Content Management)/ ContentBase Version for Version Children
ContentBase Ref (Content Management)	Links to other assets	ContentBase Version for Version Children/ ContentBase Ref (Content Management)

ContentBase Content Set Content Object

ContentBase Content Set is a prebuilt content object based on the business object ContentBase Content Set EAI. Table 45 lists the business components for the prebuilt content object ContentBase Content Set.

Table 45. Prebuilt Content Object: ContentBase Content Set

Business Components	Transferred Data	Links
ContentBase Content Set (Content Management)	Set identity	Primary
ContentBase Content Set (Content Management)_Pr. Asset	Home page identification	
ContentBase Asset (Content Management)	Asset identity	ContentBase Content Set (Content Management)/ContentBase Asset (Content Management)
ContentBase Asset (Content Management)_Access Group	ContentBase Access Group relationship	
ContentBase Asset (Content Management)_Current Version	ContentBase Asset current version identification	

Table 45. Prebuilt Content Object: ContentBase Content Set

Business Components	Transferred Data	Links
ContentBase Version (Content Management)	Asset revision information	ContentBase Asset (Content Management)/ ContentBase Version (Content Management)
ContentBase Data (Content Management)	Content stored in database repository	ContentBase Version (Content Management)/ ContentBase Data (Content Management)
ContentBase Namespace Aliases (Content Management)	XML namespace information	ContentBase Version (Content Management)/ ContentBase Namespace Aliases (Content Management)
ContentBase Version File Attachment (Content Management)	Content stored in file system	ContentBase Version (Content Management)/ ContentBase Version File Attachment (Content Management)
ContentBase Version for Version Children	Asset version interrelations	ContentBase Content Set (Content Management)/ContentBase Version for Version Children
ContentBase Ref (Content Management)	Links to other assets	ContentBase Version for Version Children/ ContentBase Ref (Content Management)

ContentBase Content Type Content Object

ContentBase Content Type is a prebuilt content object based on the business object ContentBase Content Type EAI. Table 46 lists the business components for the prebuilt content object ContentBase Content Type.

Table 46. Prebuilt Content Object: ContentBase Content Type

Business Components	Transferred Data	Links
ContentBase Content Type (Content Management)	ContentBase Asset data type	Primary
ContentBase DocType (Content Management)	SGML document type	ContentBase Content Type (Content Management)/ContentBase DocType (Content Management)

Table 46. Prebuilt Content Object: ContentBase Content Type

Business Components	Transferred Data	Links
ContentBase Namespace (Content Management)	XML namespace information	ContentBase Content Type (Content Management)/ContentBase Namespace (Content Management)
ContentBase NS Node Type (Content Management)	Namespace node information	ContentBase Namespace (Content Management)/ContentBase NS Node Type (Content Management)

ERM Group News Item Content Object

ERM Group News Item is a prebuilt content object based on the business object ERM Group News Item EAI. Table 47 lists the business components for the prebuilt content object ERM Group News Item.

Table 47. Prebuilt Content Object: ERM Group News Item

Business Components	Transferred Data	Links
ERM Group News Item EAI	News Item identity, content references	Primary
ERM Group News Content Path EAI	Publication stages for news item	ERM Group News Item EAI/ERM Group News Content Path EAI
ERM Group News Content Path Stages EAI	Publication stage details	ERM Group News Content Path EAI/ ERM Group News Content Path Stages EAI
ERM Group News Position EAI	Publication approvers for news item	ERM Group News Content Path EAI/ ERM Group News Position EAI
Access Group	Contentbase Asset access groups	ContentBase Asset (Content Management)/Access Group
ERM Group News Access Group Member EAI	Group News access group information	Access Group/ERM Group News Access Group Member EAI
ContentBase Content Set (Content Management)	Set identity	ERM Group News Item EAI/ ContentBase Content Set (Content Management)

Table 47. Prebuilt Content Object: ERM Group News Item

Business Components	Transferred Data	Links
ContentBase Content Set (Content Management)_Pr. Asset	Home page identification	
ContentBase Asset (Content Management)	Asset identity	ContentBase Content Set (Content Management)/ContentBase Asset (Content Management)
ContentBase Asset (Content Management)_Access Group	ContentBase Access Group relationship	
ContentBase Asset (Content Management)_Current Version	ContentBase Asset current version identification	
ContentBase Version (Content Management)	Asset revision information	ContentBase Asset (Content Management)/ContentBase Version (Content Management)
ContentBase Data (Content Management)	Content stored in database repository	ContentBase Version (Content Management)/ContentBase Data (Content Management)
ContentBase Namespace Aliases (Content Management)	XML namespace information	ContentBase Version (Content Management)/ContentBase Namespace Aliases (Content Management)
ContentBase Version File Attachment (Content Management)	Content stored in file system	ContentBase Version (Content Management)/ContentBase Version File Attachment (Content Management)
ContentBase Version for Version Children	Asset version interrelations	ContentBase Content Set (Content Management)/ContentBase Version for Version Children
ContentBase Ref (Content Management)	Links to other assets	ContentBase Version for Version Children/ContentBase Ref (Content Management)

Literature Content Object

Literature is a prebuilt content object based on the business object Admin Sales Tool. Table 48 lists the business components for the prebuilt content object Literature.

Table 48. Prebuilt Content Object: Literature

Business Components	Transferred Data	Links
Admin Sales Tool	Literature record and associated files	Primary
Literature Item	Detailed relationships	Admin Sales Tool/Literature Item
Literature Component Item	Association relationships	Literature Item/Literature Component Item - Admin

Microsite Management Page Content Object

Microsite Management Page is a prebuilt content object based on the business object ePortal MM Page EAI. Table 49 lists the business components for the prebuilt content object Microsite Management Page.

Views associated with this content object are:

- Add/Edit - ePortal MM Page Administration
- Preview - ePortal MM Page Designer View

Table 49. Prebuilt Content Object: Microsite Management Page

Business Components	Transferred Data	Links
EPortal MM Page EAI	Page identity	Primary
ePortal MM Page Section EAI	Page layout information	ePortal MM Page EAI/ePortal MM Page Section EAI
ePortal MM Page Item EAI	Page Item display information	ePortal MM Page Section EAI/ ePortal MM Page Item EAI

Table 49. Prebuilt Content Object: Microsite Management Page

Business Components	Transferred Data	Links
ContentBase Content Set (Content Management)	Set identity	ePortal MM Page EAI/ContentBase Content Set (Content Management)
ContentBase Content Set (Content Management)_Pr. Asset	Home page identification	
ContentBase Asset (Content Management)	Asset identity	ContentBase Content Set (Content Management)/ContentBase Asset (Content Management)
ContentBase Asset (Content Management)_Access Group	ContentBase Access Group relationship	
ContentBase Asset (Content Management)_Current Version	ContentBase Asset current version identification	
ContentBase Version (Content Management)	Asset revision information	ContentBase Asset (Content Management)/ContentBase Version (Content Management)
ContentBase Data (Content Management)	Content stored in database repository	ContentBase Version (Content Management)/ContentBase Data (Content Management)
ContentBase Namespace Aliases (Content Management)	XML namespace information	ContentBase Version (Content Management)/ContentBase Namespace Aliases (Content Management)
ContentBase Version File Attachment (Content Management)	Content stored in file system	ContentBase Version (Content Management)/ContentBase Version File Attachment (Content Management)

Table 49. Prebuilt Content Object: Microsite Management Page

Business Components	Transferred Data	Links
ContentBase Version for Version Children	Asset version interrelations	ContentBase Content Set (Content Management)/ContentBase Version for Version Children
ContentBase Ref (Content Management)	Links to other assets	ContentBase Version for Version Children/ContentBase Ref (Content Management)

Microsite Management Page Item Content Object

Microsite Management Page Item is a prebuilt content object based on the business object ePortal MM Page Item EAI. Table 50 lists the business components for the prebuilt content object Microsite Management Page Item.

Views associated with this content object are:

- Add/Edit - ePortal MM Page Administration
- Preview - ePortal MM Page Designer View

Table 50. Prebuilt Content Object: Microsite Management Page Item

Business Components	Transferred Data	Links
ePortal MM Page Item EAI	Page Item display information and asset link	Primary
ContentBase Asset (Content Management)	Asset identity	ePortal MM Page Item EAI/ ContentBase Asset (Content Management)
ContentBase Asset (Content Management)_Access Group	ContentBase Access Group relationship	
ContentBase Asset (Content Management)_Current Version	ContentBase Asset current version identification	

Table 50. Prebuilt Content Object: Microsite Management Page Item

Business Components	Transferred Data	Links
ContentBase Version (Content Management)	Asset revision information	ContentBase Asset (Content Management)/ContentBase Version (Content Management)
ContentBase Data (Content Management)	Content stored in database repository	ContentBase Version (Content Management)/ContentBase Data (Content Management)
ContentBase Namespace Aliases (Content Management)	XML namespace information	ContentBase Version (Content Management)/ContentBase Namespace Aliases (Content Management)
ContentBase Version File Attachment (Content Management)	Content stored in file system	ContentBase Version (Content Management)/ContentBase Version File Attachment (Content Management)
ContentBase Version for Version Children	Asset version interrelations	ContentBase Asset (Content Management)/ContentBase Version for Version Children
ContentBase Ref (Content Management)	Links to other assets	ContentBase Version for Version Children/ContentBase Ref (Content Management)

Price List Content Object

Price List is a prebuilt content object based on the business object Price List. Table 51 lists the business components for the prebuilt content object Price List.

Table 51. Prebuilt Content Object: Price List

Business Components	Transferred Data	Links
Price List	Price List Association relationships to Organizations	Primary

Product Content Object

Product is a prebuilt content object based on the business object Product Admin Definition. Table 52 lists the business components for the prebuilt content object Product.

Table 52. Prebuilt Content Object: Product

Business Components	Transferred Data	Links
Internal Product	Internal Product	Primary
Admin Product Definition (Content Management)	Association relationships Defined in the intersection table: Rank column; Value column	Internal Product/Admin Product Comparison - Admin (Content Management)
Component Product	Association relationships Defined in the intersection table: Relation Type	Internal Product/Component Product - Admin
FS Inventory Options	Association relationships	Internal Product/FS Inventory Options
FS Product Measurement Characteristics	Association relationships	Internal Product/FS Product Measurement Characteristics
Internal Product Sales Tool	Association relationships	Internal Product/Internal Product Sales Tool - Admin
Key Feature	Association relationships	Internal Product/Key Feature - Admin
Price List	Association relationships Defined in the intersection table: some columns	Internal Product/Price List - Admin

Product Class Content Object

Product Class is a prebuilt content object based on the business object XA Authoring Object. Table 53 lists the business components for the prebuilt content object Product Class.

Table 53. Prebuilt Content Object: Product Class

Business Components	Transferred Data	Links
XA Class	Product Class	Primary
XA Class Translation	Product Class Language Translations	XA Class/XA Class Translation
XA Attribute	Product Class Child Attributes	XA Class/XA Attribute
XA Attribute Translation	Product Class Child Attribute Language Translations	XA Attribute/XA Attribute Translation

Product Feature Content Object

Product Feature is a prebuilt content object based on the business object Product Feature (Content Management). Table 54 lists the business components for the prebuilt content object Product Feature.

Table 54. Prebuilt Content Object: Product Feature

Business Components	Transferred Data	Links
Product Feature	Product Feature	Primary
Product Feature_Product Line	Association of Features to Product Line	N/A

Product Line Content Object

Product Line is a prebuilt content object based on the business object Admin Product Line (Content Management). Table 55 lists the business components for the prebuilt content object Product Line.

Table 55. Prebuilt Content Object: Product Line

Business Components	Transferred Data	Links
Admin Product Line	Product Line	Primary
Admin Product Line_Position	Association to Position	N/A

Resolution Item Content Object

Resolution Item is a prebuilt content object based on the business object Resolution Item. Table 56 lists the business components for the prebuilt content object Resolution Item.

Table 56. Prebuilt Content Object: Resolution Item

Business Components	Transferred Data	Links
SR Resolution Item	Resolution Item	Primary
Solution	Association relationships	SR Resolution Item/Solution

Solution Content Object

Solution is a prebuilt content object based on the business object Solution. Table 57 lists the business components for the prebuilt content object Solution.

Table 57. Prebuilt Content Object: Solution

Business Components	Transferred Data	Links
Solution	Solution	Primary
Related Solution	Association relationships	Solution/Related Solution
SR Resolution Item	Association relationships	Solution/SR Resolution Item

Volume Discount Content Object

Volume Discount is a prebuilt content object based on the business object Volume Discount. Table 58 lists the business components for the prebuilt content object Volume Discount.

Table 58. Prebuilt Content Object: Volume Discount

Business Components	Transferred Data	Links
Volume Discount	Volume Discount	Primary
Volume Discount Item	Detailed relationships	Volume Discount/Volume Discount Item - Admin (This link has no restriction on insert/update.)
Price List	Association relationships Defined in the intersection table: some columns	Internal Product/Price List - Admin

Content Project Business Service

The Content Project business service allows clients to perform various operations on Siebel Content Projects. Business service scripts, workflow-driven services, and business components can call the Content Project business service methods to manipulate Content Projects. It can be used to start and publish a content project and to add, delete, and update a content project or a content item.

AddContentItem Method

This method adds a content item to the specified project. First it searches the project in the Content Project business component, and then it searches content type name, pick applet, picklist name, and source field name in the Content Type business component.

Table 59 lists the arguments for the AddContentItem method.

Table 59. Arguments for the AddContentItem Method

Argument	Type	Description	Required
ProjectId	Input	The project ID to add a content item	X
ItemName	Input	The item name to add	X
ItemAction	Input	The action for item to perform	X
ItemDescription	Input	The description for the item	
ItemTypeId	Input	Type ID for the item	X
ItemReference	Input	The reference for the item	
ItemId	Output	The item ID for the added item	

AddProject Method

This method creates a new content project.

Table 60 lists the arguments for the AddProject method.

Table 60. Arguments for the AddProject Method

Argument	Type	Description	Required
ProjName	Input	The project name to create	X
ProjectDescription	Input	The description for the project	
ProjectOwnerId	Input	The owner ID for the project	
ProjectPlanPublicationDate	Input	The planning publication date for the project	
ProjectPublicationWorkflowId	Input	The publication workflow ID for the project	
ProjectId	Output	The project ID for the created project	

Export Method

If Connect String is not empty, this method exports the project from the staging environment to the production environment. If Connect String is empty and Export Directory is not empty, the method exports the project to the export directory. The method fails if both Connect String and Export Directory are empty.

Table 61 lists the arguments for the Export method.

Table 61. Arguments for the Export Method

Argument	Type	Description	Required
Content Project Id	Input	The project ID to export	X
Connect String	Input	Connect string to export	
Export Directory	Input	The directory to export	

Import Method

This method imports a project which has been exported using Export method.

Table 62 lists the arguments for the Import method.

Table 62. Arguments for the Import Method

Argument	Type	Description	Required
Content Project Id	Input	The project ID to import into	X
Export Directory	Input	The directory containing the export project	

PublishProject Method

This method publishes the project by calling the methods RequestPublish and Publish of Content Project business component. If SynchronousIndicator = "N", the method calls the RequestPublish method. Otherwise, it calls the Publish method.

Table 63 lists the arguments for the PublishProject method.

Table 63. Arguments for the PublishProject Method

Argument	Type	Description	Required
ProjectId	Input	The project ID to publish	X
SynchronousIndicator	Input	Indicator for sync (Y or N; default is Y)	

RemoveContentItem Method

This method removes a content item. If ItemId is provided, ProjectId and ItemName are not necessary. Otherwise, ProjectId and ItemName are required.

Table 64 lists the arguments for the RemoveContentItem method.

Table 64. Arguments for the RemoveContentItem Method

Argument	Type	Description
ProjectId	Input	The project ID from which the content item is removed
ItemName	Input	The item name to remove
ItemId	Input	The item ID to remove

RemoveProject Method

This method removes a content project.

Table 65 lists the arguments for the RemoveProject method.

Table 65. Arguments for the RemoveProject Method

Argument	Type	Description	Required
ProjectId	Input	The project ID to remove	X

StartProject Method

This method starts the project by calling the methods RequestStartProject and StartProject of the Content Project business component. If SynchronousIndicator = "N", the method calls the RequestStartProject method. Otherwise, the method calls the StartProject method.

Table 66 lists the arguments for the StartProject method.

Table 66. Arguments for the StartProject Method

Argument	Type	Description	Required
ProjectId	Input	The project ID to start	X
SynchronousIndicator	Input	Indicator for sync (Y or N; default is Y)	

UpdateContentItem Method

This method updates a content item. If ItemId is provided, ProjectId and ItemName are not necessary and the item name can be updated. Otherwise, ProjectId and ItemName are required. If ItemTypeId is provided, the method searches content type name, pick applet, picklist name, and source field name in Content Type business component.

Table 67 lists the arguments for the UpdateContentItem method.

Table 67. Arguments for the UpdateContentItem Method

Argument	Type	Description
ProjectId	Input	The project ID where update the content item
ItemName	Input	The item name to update
ItemId	Input	The item ID to update
ItemAction	Input	The action for item to update
ItemDescription	Input	The description to update
ItemTypeId	Input	Type ID to update

Table 67. Arguments for the UpdateContentItem Method

Argument	Type	Description
ItemReference	Input	The reference to update
ItemStatus	Input	The item status to update

UpdateProject Method

This method updates a content project.

Table 68 lists the arguments for the UpdateProject method.

Table 68. Arguments for the UpdateProject Method

Argument	Type	Description	Required
ProjectId	Input	The project ID for updating	X
ProjName	Input	The project name to update	
ProjectDescription	Input	The description to update	
ProjectOwnerId	Input	The owner ID to update	
ProjectPlanPublicationDate	Input	The planning publication date to update	
ProjectPublicationWorkflowId	Input	The publication workflow ID to update	

Index

B

C

D

E

F

L

M

N

O

P

Q

R

T

U

V

W

Z