



Siebel Email Response Administration Guide

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What's New in This Release

What's New in Siebel Email Response Administration Guide, Version 7.7

Table 1 lists changes described in this version of the documentation to support release 7.7 of the software.

Table 1. New Product Features in Siebel Email Response Administration Guide, Version 7.7

Topic	Description
"Understanding the Communications Inbound Receiver (CIR) and Communications Inbound Processor (CIP) Server Components" on page 11.	As part of the new Siebel Email Response server architecture, these two new server components replace the Communications Inbound Manager component. You can use the CIR and CIP to create a higher-performing, more scalable architecture that meets your business requirements.
"Using Siebel Email Response Analytics" on page 11	This new feature allows you to record a timestamp at different stages of email processing.
"Using the Siebel Email Response Smart Character Set" on page 111.	This new feature allows Web-based email to be read, processed, and responded to in the language of the person sending the email.
"Creating Secure Sockets Layer (SSL) Connections for SMTP and POP3 Drivers" on page 12.	This new feature allows you to establish secure connections between your Siebel Server and email server.
Chapter 8, "Troubleshooting Siebel Email Response."	New troubleshooting techniques and improved diagnostics for resolving Siebel Email Response issues are described in this chapter.

2

Overview of Siebel Email Response

This chapter provides an Overview description of Siebel Email Response. It includes the following topics:

- “Fundamentals of Using Siebel Email Response”
- “Siebel Email Response Features” on page 10
- “Deploying Siebel Email Response” on page 17
- “Determining How Agents Use Siebel Email Response” on page 19
- “Working with Siebel Applications” on page 20
- “Understanding the Siebel Email Response Architecture” on page 21

Fundamentals of Using Siebel Email Response

Siebel Email Response allows organizations to manage and respond to a high volume of incoming email. It has a browser-based user interface, accesses a single company-wide customer information database, and can be used with other Siebel eBusiness applications.

Siebel Email Response and Siebel Communications Server are installed with the Siebel Server and work together to receive email and send responses. Siebel Communications Server supports and integrates communications channels used to communicate with customers. The following Communications Server components handle email traffic to and from Siebel Email Response.

- Communications Inbound Receiver (CIR) pulls email from the email server, converts the email into event data, and creates an SRM request for Communications Inbound Processor.
- Communications Inbound Processor (CIP) receives the events from Communications Inbound Receiver and processes them using workflows.
- Communications Outbound Manager manages outbound communications with customers. Siebel Email Response uses the Communications Outbound Manager server component to send responses.

In addition to handling email traffic, the Communications Server can support a multichannel toolbar when you install Siebel Universal Queuing. This toolbar includes buttons used by agents to access different communications channels, such as voice and email. Many Siebel products, such as Siebel Email Response and Siebel Call Center, use the communications toolbar to allow agents to initiate outgoing communications and accept incoming communications using any supported communications channel. For details about Communications Server components and the communications toolbar, see *Siebel Communications Server Administration Guide*.

Siebel Email Response performs the following tasks:

- Monitors one or more mailboxes on your email system.

- Parse an inbound email message for various fields, such as Sender, Message Body, and Message attributes for further processing.
- Creates an activity record in the Siebel database for each inbound email and stores the content of the email in fields within the new record.
- Sends an acknowledgment message to let the sender know that the sender's email has been received.
- Routes an inbound email message to an agent, based on parameters such as agent skills, when integrated with Siebel Business Process Designer and Siebel Assignment Manager or Siebel Universal Queuing.
- Automatically routes an email message to an agent.
NOTE: You can use Siebel Smart Answer (optional module) with Siebel Email Response to also receive a suggested response to an email.
- Allows an agent to compose and send a response message using templates configured for your company's needs. Templates save agents' time and give them preapproved responses to send to customers.
- Includes a spell-checking feature to improve the accuracy of messages.
- Accesses customer data and history in one customer information database.
- Provides international support for companies that receive email messages from customers around the world in the following ways:
 - Many different international languages. For information on supported languages, see *Siebel System Requirements and Supported Platforms* on Siebel SupportWeb.
 - Unicode support. Organizations can deploy Siebel Email Response around the globe, without requiring separate Siebel environments.

Siebel Email Response Features

This section presents an overview of the following Siebel Email Response features:

- [Understanding the Communications Inbound Receiver \(CIR\) and Communications Inbound Processor \(CIP\) Server Components](#)
- [Using Siebel Email Response Analytics](#)
- [Creating Secure Sockets Layer \(SSL\) Connections for SMTP and POP3 Drivers](#)
- [Processing Structured and Unstructured Messages](#)
- [Processing Responses Based on Service-Level Agreements \(SLAs\)](#)
- [Using Siebel Business Process Designer and Routing and Queuing Methods](#)
- [Analyzing Email Content With Siebel Smart Answer \(Optional Module\)](#)
- [Associating Multiple Organizations With Siebel Email Response](#)
- [Identifying Contacts By Email Addresses](#)

■ Receiving Email With the Smart Character Set

Understanding the Communications Inbound Receiver (CIR) and Communications Inbound Processor (CIP) Server Components

In the Siebel 7.7 release, the Communications Inbound Receiver (CIR) and Communications Inbound Processor (CIP) server components replace the Communications Inbound Manager component. You use Communications Inbound Receiver (CIR) for receiving inbound email messages and Communications Inbound Processor (CIP) for processing (using business logic) email message. You can use Communications Inbound Receiver (CIR) and Communications Inbound Processor (CIP) to process all inbound emails, whether they are Web-structured or unstructured messages.

This new architecture allows for better performance and greater scalability. Your system can now run continuously (24 hours/day, 7 days/week) with no manual restart required when making changes to profiles and response groups. Depending on your business needs, you can also run Siebel Email Response in real-time mode, with only the Communications Inbound Receiver (CIR) component processing email, or nonreal-time mode, with both Communications Inbound Receiver (CIR) and Communications Inbound Processor (CIP) processing email with multiple instances of Communications Inbound Receiver (CIR) and Communications Inbound Processor (CIP) on different Siebel Servers. For more information on the Siebel Email Response architecture, see [“Understanding the Siebel Email Response Architecture” on page 21](#).

Using Siebel Email Response Analytics

Siebel Email Response Analytics allows you to create a timestamp for an email as it moves through the different stages of email processing. The timestamp fields are initially recorded at various points in the workflow and then written to the S_EM_RESP_TM table using the *Update Analytics Record* method in the Inbound Email Database Operation business service.

You can capture the time an email is received, processed, created, sent by the server, assigned to, replied to or sent by an agent. [Table 2](#) provides a list of the timestamp fields.

Table 2. Siebel Email Response Timestamp fields

Field	Description
Received	The time Siebel Email Response receives an email.
Processing	The time Siebel Email Response begins processing an email.
Created	The time Siebel Email Response creates an activity for an email.
Server Send	The time Siebel Email Response sends either an auto acknowledgement or an auto response for an email.
Reply	The time an agent responds to an email.

Table 2. Siebel Email Response Timestamp fields

Field	Description
Agent Send	The time an agent sends out a responding email.
Assigned	The time an event is assigned to an owner either through Universal Queuing (UQ) or Assignment Manager.

Creating Secure Sockets Layer (SSL) Connections for SMTP and POP3 Drivers

Siebel Email Response allows the SMTP and POP3 drivers to work with email servers that are enabled for SSL. This provides secure transmission of data between the Siebel Server and the email servers. For information on how to enable an SSL connection for SMTP and POP3 drivers, see ["Enabling a Secure Sockets Layer \(SSL\) Connection for SMTP and POP3 Drivers" on page 68.](#)

Processing Structured and Unstructured Messages

Siebel Email Response can process two types of the most common messages sent to many organizations, structured and unstructured. The following sections describe the way Siebel Email Response handles each type of message and the advantages and disadvantages of each type of message:

Processing Structured Email Messages

Siebel Email Response uses the eMail Response - Process Service Request workflow to process structured (keyword-based or Web-form) messages. You can use a number of keywords (such as help, query, status, submit, and update) when processing and creating service requests for keyword-based emails.

To use structured email processing, you should provide your customers with email templates or with Web forms (Web-based forms on your Web sites).

NOTE: You can create Web forms with the Web development product used to maintain your current Web site. Siebel Systems does not make a Web-form product. However, organizations using Siebel eService can configure Web pages, views, and applets to meet many of their business needs. For more details, see *Siebel eService Administration Guide*.

Examples of incoming structured (keyword-based or Web-form) messages are:

- New service requests
- Status requests for pending service requests
- Updates for existing service requests
- Searches for specific service requests

Structured email messages should be processed using the eMail Response - Process Service Request workflow process. This workflow process creates service request records in the Siebel database that can be viewed on the Communications screen.

Processing Keyword-Based Email

For keyword-based email, specific keywords are required in the subject headers of incoming email messages to indicate different actions. For example, Help, Status, Query, Submit, and Update are keywords that can be required in the subject to initiate an action. The keyword allows Siebel Business Process Designer to determine the appropriate process for a given email. In keyword-based email messages, customers must understand and use the required format or the data will not be parsed correctly.

Processing Web Forms

Web forms allow the customer to communicate the severity of a problem, allow Siebel Email Response to categorize the problem, and provide information that Siebel Assignment Manager can use to notify the appropriate service representatives in your organization. If you use Web forms, you will need administrators to build and maintain them.

Processing Unstructured Email

Unstructured email (free-form) messages require no special subject or structure in the incoming email. They allow a broad range of communications, such as:

- Requests for general information
- Requests for information about a product or event
- Order requests

Unstructured email messages should be processed using the eMail Response - Process Message workflow process. This workflow process creates activity records in the Siebel database that can be viewed on the Communications screen.

This method is useful when Web forms are not available or when your customers must receive personalized service. However, free-form messages make it more difficult to automate the response process because customer emails frequently do not include all the information necessary to process a message.

Processing Responses Based on Service-Level Agreements (SLAs)

Siebel Email Response can use information from your customers' service-level agreements when processing incoming emails. For example, if your organization has two levels of support, standard and premier, your Siebel Email Response administrator can implement Siebel Email Response in the following ways:

- Customers with standard agreements can have access to full online support but do not receive any premier services.

- Customers with premier agreements can send an email message and receive an immediate auto-acknowledgment giving the latest date and time that they will receive a response.

Using Siebel Business Process Designer and Routing and Queuing Methods

You use Siebel Business Process Designer with routing and queuing products or methods to further automate your email interactions. Routing and queuing applications and methods assign incoming records to employees, positions, and organizations.

Your company can manage your email processes by using Siebel Business Process Designer with one of the following routing and queuing methods or by integrating Siebel Email Response with a third-party routing and queuing application:

- **Manual routing.** A person must manually assign every work item as it comes in. This is the most labor-intensive method.
- **Siebel Assignment Manager (optional).** Assigns inbound work items such as opportunities, email, or service requests to agents based on your business rules and the agents' skills, product expertise, language skills, availability, workload, and other criteria. You can change the rules as your business requirements change.
- **Siebel Universal Queuing (optional).** Can assign, route, and queue work items from multiple channels. Siebel Universal Queuing tracks customer interactions (email, telephone calls, Web collaboration, and so on), agent states, and channel states, and determines the way to route and assign work items using a combination of channel type, skill type, and agent availability. Agents can access communications channels by using the communications toolbar.

Using the communications toolbar, Siebel Universal Queuing allows agents to work on a combination of call center channels such as inbound and outbound calls, faxes, pages, and email, prioritizing each communication by volume and service level.

- **Custom routing and queuing.** You can design and program your own routing and queuing using Siebel Business Process Designer.

See ["Tables and Reference"](#) for a comparison chart that describes various routing and queuing methods and their advantages and disadvantages. For additional information about Siebel Email Response routing and queuing requirements, see ["Revising, Testing, and Activating Workflow Processes"](#) and ["Implementing Routing and Queuing Processes"](#).

Using the Spell Check Feature

Siebel Email Response uses a spell-checking feature that is available with Siebel eBusiness applications. It can identify many spelling errors in text communications (including email, service requests, and solutions) before they are sent to customers. The spell check feature is automatically installed and enabled as part of the Siebel Server and Mobile Web Client installation processes.

By default, the spell check feature ignores HTML in outbound email messages. You can change this and other spell check options (for example, the option to automatically check spelling when an email is sent) in the Spelling view of the User Preferences screen. For more information about setting user preferences, see *Applications Administration Guide*.

Setting Up a Default Dictionary

The spell check feature uses the dictionary for the default language specified during installation. During installation, dictionary files (lexicons) for the most common international languages are installed. Common dictionary files (two files for each language, with the TLX and CLX extensions) are stored in the [ROOT]\lex directory during installation. All included language dictionaries are installed regardless of the default language your systems administrator selects during installation. For a list of supported languages, see *Siebel System Requirements and Supported Platforms* on Siebel SupportWeb.

NOTE: Medical and legal dictionaries are available only in U.S. English.

In the User Preferences screen, agents can change the default language used for the spell check feature. If you assign a default language in user preferences, the spell check feature uses that default language to check the spelling in replies to inbound emails. For more information about user preferences, see *Applications Administration Guide*.

Creating a Personal Dictionary

An agent can add frequently used words to a personal dictionary (custom user dictionary) that is saved on the server so that it is accessible from any workstation the agent uses. These dictionaries are stored in the following locations:

[FILESERVERROOT]\userpref\[USERNAME&]\[USERNAME_LANGID].tlx and
[FILESERVERROOT]\crm\[USERNAME_LANGID].tlx.

Analyzing Email Content With Siebel Smart Answer (Optional Module)

Siebel Smart Answer analyzes email content and sends an automatic response to the customer or suggests a response for the agent. For more information and setup instructions, see *Siebel Smart Answer Administration Guide*.

Automatic response. Answers customer inquiries and Web requests without agent intervention by automatically interpreting the customer's request and locating an appropriate response.

Automatic suggestion. This feature analyzes an email's content and recommends a response for agents to review before sending the response to the customer. You use automatic suggestion for complex situations in which the auto-response feature is not appropriate. Using a solution or template associated with the response category, Smart Answer creates a suggested response.

In many situations, you can use both the automatic suggestion and automatic response features of Siebel Smart Answer, depending on the confidence of the Smart Answer engine. For example, the administrator can establish a rule whereby Smart Answer automatically responds if the confidence parameter is greater than 90 percent, and if the confidence parameter is less than 90 percent, Smart Answer suggests a response for an agent to evaluate.

Self-learning technology. The automatic response and automatic suggestion features are based on a technology that determines the way to respond to email messages by learning from the behavior of the agents. When an agent chooses a category and clicks send, the feedback is sent to the knowledge base. Over time, this feedback trains the knowledge base using the categories that agents choose.

Language support. For a list of languages supported by Smart Answer, see *Siebel System Requirements and Supported Platforms* on Siebel SupportWeb.

Associating Multiple Organizations With Siebel Email Response

In Siebel Email Response, you can associate business entities with a specific organization. This gives you a way to filter and access records. If your company consists of multiple organizations, you can look up contacts by organization.

Identifying Contacts By Email Addresses

Siebel Email Response allows you to identify one contact that has multiple email addresses or multiple contacts that share one email address. The eMail Response - Process Message and eMail Response - Process Service Request workflows support contact verification.

Identifying One Contact With Multiple Email Addresses

Many customers have multiple email addresses. For example, they might work from multiple locations (office, home, other remote locations, and so on). Therefore, when your customers contact you, you need to be able to identify them no matter what email address they use. Siebel software is preconfigured to allow you to add a contact's alternate email addresses in the Contacts screen, More Info view.

NOTE: In the Contacts screen, the Do Not Email check box applies to all email addresses in this contact record.

Identifying Multiple Contacts That Share One Email Address

When Siebel Email Response receives an email, it searches all contact records for the sender's email address.

- First, Siebel Email Response compares the sender's email address to the email address in the Email field.

- When Siebel Email Response finds a match, it creates an activity record and associates it with that contact record. If multiple contact records contain the sender's email address, Siebel Email Response associates the email with the first contact record found and creates an activity record for that contact.

After Siebel Email Response creates an activity record, the following events occur:

- One inbound email is routed, if routing is enabled.
- In a preconfigured Siebel Email Response application, an auto acknowledge response is sent to the email sender. However, you will have to add the response group parameter for no response to be sent.
- The eMail Response - Update Activity Status workflow process updates the activity status for the contact.
- The eMail Response - Client Send Email workflow process updates the response activity status and inbound activity status for the contact.

Receiving Email With the Smart Character Set

The Smart Character Set feature allows you to receive, process, and reply to an email in the same character set as the inbound email. For more information on this feature, see ["Using the Siebel Email Response Smart Character Set" on page 111](#).

Deploying Siebel Email Response

You can implement Siebel Email Response in the following ways:

- To use only the Siebel Email Response features, a base application such as Siebel Sales, Siebel Marketing, Siebel Service, or Siebel Call Center is required. Instead of configuring both Siebel Email Response and the base application, only Siebel Email Response needs to be configured. Using a Siebel base application as a foundation for your deployment of Siebel Email Response can solve the immediate challenge of routing and processing a high volume of incoming email and can be an interim step before you implement a larger, more integrated solution.
- The Siebel Email Response add-on module (integrated solution) includes Siebel Email Response features (without Siebel Service functionality) and can be added to many other Siebel applications, including Siebel Sales, Siebel Marketing, Siebel Service, and Siebel Call Center. For example, if you wanted only Siebel Marketing and Siebel Email Response, you would purchase the Siebel Marketing base application and the Siebel Email Response add-on module.

Siebel Email Response is installed during the installation of your purchased Siebel base application package and does not require separate installation.

The following topics provide additional information about Siebel Email Response deployment:

- ["Designating an Implementation Team"](#)
- ["Implementing Siebel Email Response in an International Environment"](#)

Designating an Implementation Team

You should designate several people to serve as the Siebel Email Response deployment team. They will coordinate the setup and maintenance of its new email system by using [Chapter 3, “Planning a Siebel Email Response Deployment,”](#) as a guide. After the planning process is complete, the email response administrator uses the instructions in [Chapter 4, “Completing Basic Setup Tasks,”](#) to set up the Siebel Email Response components. Employees who perform the following roles should be on your Siebel Email Response implementation team:

- **System administrator.** Responsible for installing, configuring, and maintaining the network, including the email server, the Smart Answer server component, and the Siebel environment.
- **Siebel Email Response administrator.** Responsible for setting up and maintaining Siebel Email Response, including profiles, drivers, response groups, catalogs, response categories, and templates.
- **Developer.** Responsible for configuring and customizing the Siebel application to meet the customer’s business requirements, including view modifications and process automation.
- **Business analyst.** Responsible for:
 - Mapping and developing customer business processes in Siebel Business Process Designer.
 - Developing response categories, solutions, and templates for use by agents.
 - Creating and maintaining the knowledge base for Smart Answer. For additional information, see *Siebel Smart Answer Administration Guide*.
- **Agent.** Responsible for providing feedback to the system administrator and business analyst during the development process.

NOTE: The same employee may perform more than one role.

Implementing Siebel Email Response in an International Environment

Siebel Email Response supports Unicode and the ability to filter templates based on language and locale settings in a single Siebel Systems environment. No matter whether the database is unicode or not, incoming email content will be converted to Unicode. If the database is Unicode, then all characters after the conversion will be saved in the database. However, non-ASCII characters will *not* be able to be saved after the conversion. For global deployment resources, see the following list:

Topic	Resource
Configuring Siebel software to use multiple languages. For general Unicode information, see the sections about global deployment scenarios.	<i>Global Deployment Guide</i> .
Siebel Email Response global deployment setup, including the Smart Character Set feature.	Chapter 7, “Global Deployment Setup and Configuration” in this guide.

Topic	Resource
Supported database code pages.	The server installation guide for your operating system.
Supported languages.	<i>Siebel System Requirements and Supported Platforms</i> on Siebel SupportWeb.

Determining How Agents Use Siebel Email Response

Agents receive incoming email messages in the Communications screen in the Inbound Item List view or when a work item is routed to the communications toolbar by Siebel Universal Queuing.

Agents select incoming email messages from their Communications list or accept messages using the communications toolbar. The way they reply to email depends on the way your organization chooses to implement Siebel Email Response.

- **Siebel Email Response.** Agents select appropriate templates or solutions, or compose free-form content.
- **Siebel Email Response with Siebel Smart Answer.** Smart Answer reviews the intent of incoming messages and assigns a category and score that indicates how closely the incoming email matches the category. The agent reviews the incoming email’s content and the suggested category. The agent might need only to verify the suggested category, select a solution or template that is associated with that category, and make additional comments before sending the reply to the customer.

If an agent is not satisfied with a category provided by Smart Answer, that agent can change the category for the message and use a different solution or template. Smart Answer records this change as feedback so that it can improve categorization accuracy.

With both implementations, an agent can attach useful literature or files to a reply, use the spell check feature to find spelling errors, and look for errors not found by the spell check feature. When the reply is finished, the agent sends it.

NOTE: No matter whether the database is Unicode or not, incoming email content will be converted to Unicode. If the database is Unicode, then all characters after conversion will be saved into the database. Otherwise, non-ASCII characters will *not* be saved after the conversion. When agents reply to incoming email, the character set of the reply is determined by the Smart Character Set feature. For more information on this feature, see [“Using the Siebel Email Response Smart Character Set” on page 111](#).

For more information about how agents use Siebel Email Response, see *Applications Administration Guide*. For more information about Siebel Smart Answer, see *Siebel Smart Answer Administration Guide*.

Working with Siebel Applications

Siebel Email Response can be used with any Siebel application, such as Siebel Sales, Siebel Marketing, Siebel Service, and Siebel Call Center.

■ Siebel Sales

Agents can generate opportunities from Siebel Email Response that are accessed by sales representatives.

■ Siebel Marketing

Companies need to be prepared to handle the large quantities of inbound messages generated as a result of large outbound email campaigns. Siebel Email Response processes customer responses to the campaign and outgoing messages that are returned to your company because of incorrect email addresses or overloaded email servers, using the same routing rules defined for the rest of your company.

■ Siebel Service

Siebel Service schedules service requests, installations, projects, and preventive maintenance activities and dispatches them to the right person. When customers send email requesting a service call status or a change request, Siebel Email Response routes email to the correct field agents, allowing them to respond and adjust their schedules immediately.

■ Siebel Call Center

A unified, multichannel desktop application with voice, email, and fax channels. The Siebel Call Center base application includes Siebel Service, Siebel Sales, and the Siebel Email Response optional module. When logged on to Call Center, an agent can use any available channel to communicate with customers. If the customer sends email, the agent replies using Siebel Email Response. If the customer makes a phone call, the agent can switch to the voice channel and handle the phone call.

Understanding the Siebel Email Response Architecture

The Siebel Server and the Siebel Email Response application process incoming emails and handle the replies. Figure 1 provides a high-level overview of a typical email process, which starts when a customer sends an email and ends when Siebel Server components (either Communications Inbound Receiver or Communications Inbound Receiver and Communications Inbound Processor) process the incoming email and send a reply back to the customer.

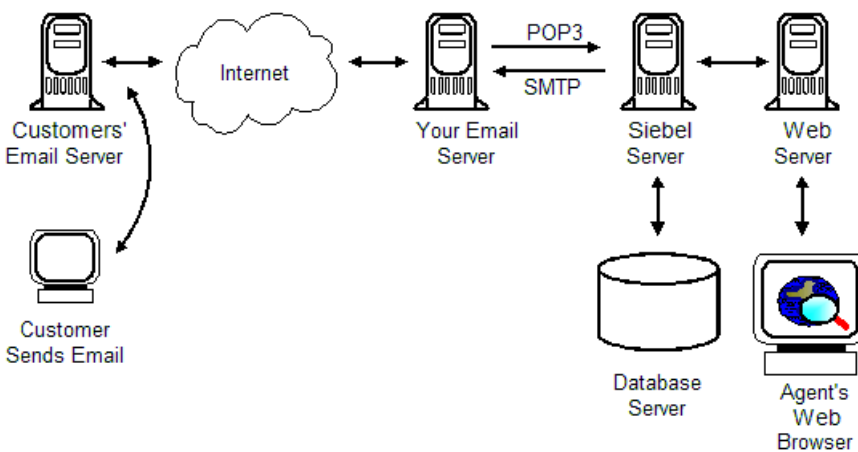


Figure 1. Siebel Email Response Architecture Overview

Understanding Siebel Email Response Workflows

The Siebel Email Response workflow begins when a customer sends an email to your company over the Internet using that customer's email software. In example described in Figure 1, the email passes through the customer's email server and communicates with your email server using SMTP/POP3 (Simple Mail Transport Protocol and Post Office Protocol 3) communication protocols. The Communications Inbound Receiver (CIR) uses POP3 to retrieve the inbound message.

Determining Supported Email Sender Software and Email Server

The following guidelines describe the types of email software a sender can use and the types of email servers that should be used by your company.

- **Sender's email system.** The sender can use any email software product currently used on the Internet.
- **Your email server.** The Siebel-provided Internet SMTP/POP3 Server driver has been tested and certified with a number of email servers. Although many email servers support the SMTP and POP3 email protocols, it is recommended that you use a supported email server for the following reasons:
 - These servers have been certified and tested by Siebel Engineering.

- Siebel Technical Support has access to these servers in supporting customer issues.

See *Siebel System Requirements and Supported Platforms* on Siebel SupportWeb for support information about your email system.

Managing Siebel Server Components to Process Incoming Email

Once a customer sends an email to your company, your email server that is connected to the Siebel Server receives the email and passes it to the Communications Inbound Receiver (CIR). The Communications Inbound Receiver (CIR) resides on the Siebel Server and has a primary role in the Siebel Email Response processes. Three Communications Server components manage inbound and outbound email messages: Communications Inbound Receiver (receives email), Communications Inbound Processor (processes and routes email), and Communications Outbound Manager (sends responses to the email). Workflow Manager invokes other Siebel Server components, such as Assignment Manager, Universal Queuing, and Smart Answer Manager. Communications Inbound Receiver uses the Internet SMTP/POP3 Server driver to periodically connect to your email server and check for new email messages. When Communications Inbound Receiver detects a new message, it does the following:

- Downloads the message and attachments from the email server.
- Parses elements of the email message (To:, CC:, Subject:, and body content) and places them in memory.
- Converts this email data into event data which will be saved in the database (if less than 15K) or the Siebel File System (if greater than 15K).
- If you are using nonreal-time email processing, the Communications Inbound Receiver creates a SRM request to inform the Communications Inbound Processor that a new event has been created.
- If you are using nonreal-time email processing, the Communications Inbound Receiver passes event data from memory to the Communications Inbound Processor.

NOTE: Communications Inbound Processor can start multiple subprocesses so that multiple instances of a workflow can operate in parallel.

Processing Email in Real-Time and Nonreal-Time

Depending on your business requirements, you can process email in one of the following ways:

- [Processing Email in Real-Time](#)
- [Processing Email in Nonreal-Time](#)

Figure 2 provides examples of different Communications Inbound Receiver and Communications Inbound Processor configurations for your Siebel Enterprise.

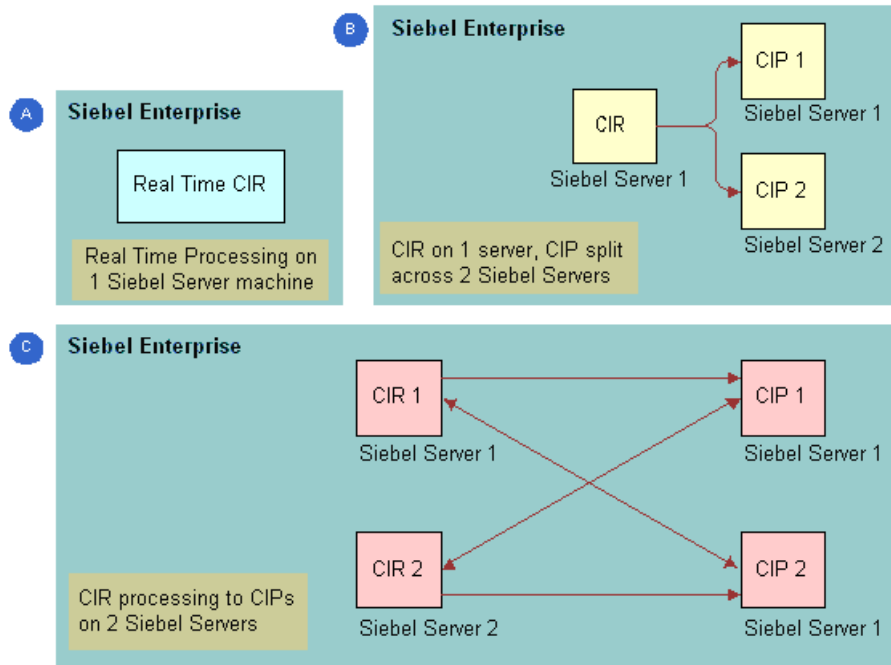


Figure 2. Communications Inbound Receiver and Communications Inbound Processor Configuration Examples.

Processing Email in Real-Time

Real-Time email processing only uses one server component, Communications Inbound Receiver. This type of processing is best for businesses with a low volume of email customers or businesses who primarily use phone events, as these types of events *always* use real-time mode. [Figure 3](#) describes the architecture for real-time email processing. For information on how to enable real-time email processing, see ["Enabling Real-Time Email Processing"](#) on page 63.

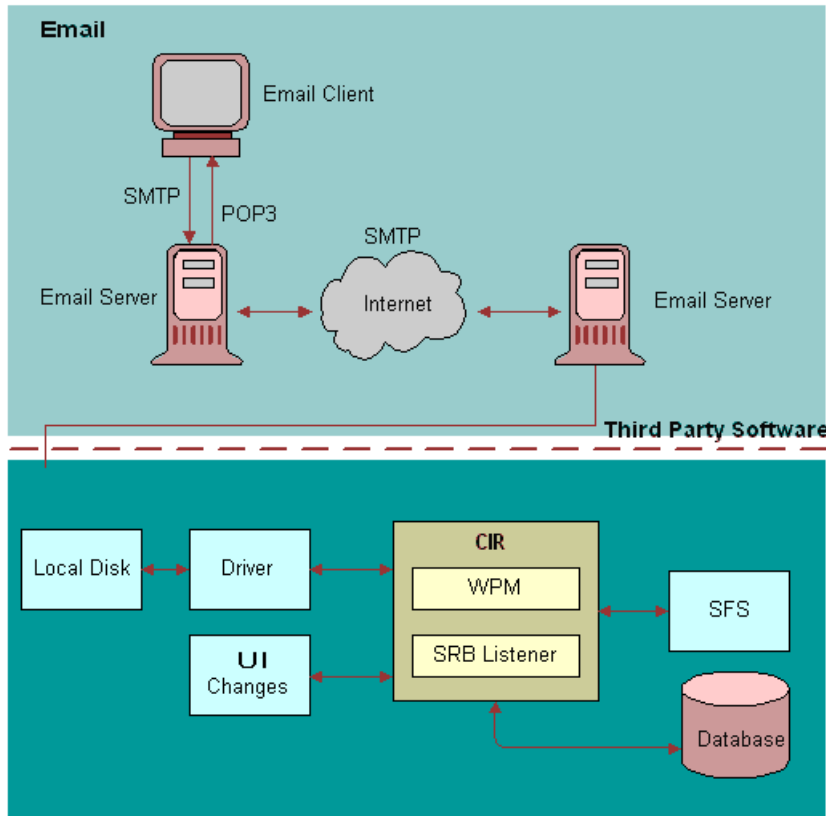


Figure 3. Real-Time Email Processing.

Processing Email in Nonreal-Time

Nonreal-Time email processing has both server components, Communications Inbound Receiver (CIR) and Communications Inbound Processor (CIP) running as separate server components. This type of processing allows you to have multiple instances of Communications Inbound Receiver (CIR) and Communications Inbound Processor (CIP) on different Siebel Servers, providing a distributed architecture which is more scalable and reliable than real-time email processing. Figure 4 describes the architecture for Nonreal-Time email processing. For information on how to enable nonreal-time email processing, see “Enabling Nonreal-Time Email Processing” on page 63.

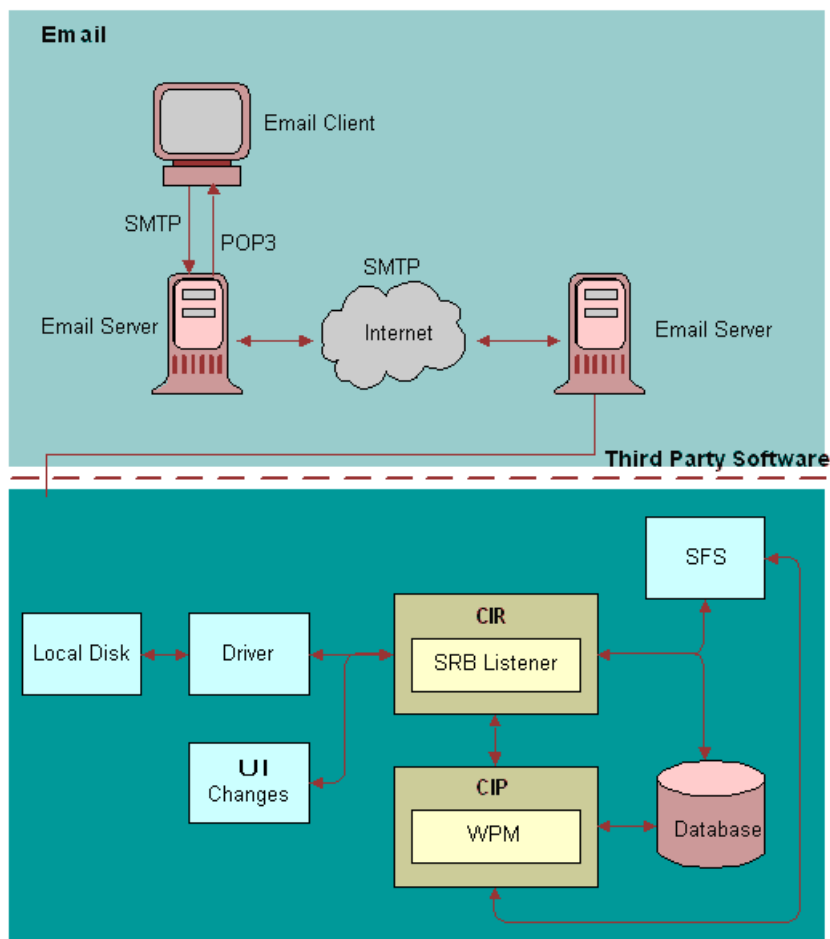


Figure 4. Nonreal-Time Email Processing.

Processing Incoming Email with Siebel Business Process Designer

Communications Inbound Processor uses the Workflow Process Manager in the Siebel Business Process Designer to process an email message in a number of ways, depending on the workflow process you select to handle that type of message. Siebel Systems ships several preconfigured workflow processes that provide email processing features. For more information, see Chapter 5, “Setting Up Siebel Email Response Workflows.” The Workflow Process Manager in Siebel Business Process Designer can be set up to perform the following tasks:

- Determine the commit time (the time by which you should reply to the message) based on the customer's service-level agreement.
- Send the message to Smart Answer Manager for language detection and categorization.
- Send the message to Assignment Manager or Universal Queuing for routing.
- Write a record to your database if the message is routed to an agent for response.
- When integrated with routing and queuing software, route incoming email to an agent based on defined parameters such as agent skills. The selected routing and queuing processes route and queue messages to the agent with the skills that are necessary to respond to the message.

Determining How an Agent Replies to Email

The agent reviews the message using the Siebel client and composes and sends a reply using templates configured for your company's needs. See [Figure 1 on page 21](#) for an illustration of this process.

Understanding How the Communications Server Returns a Reply to a Customer

When the agent sends the message, Communications Outbound Manager, a Communications Server component, sends the replies through your email server using SMTP/POP3 communication protocols. Your email server then sends the email over the Internet to the customer's email server and the customer's email server sends it to the customer's mailbox. See [Figure 1 on page 21](#) for an illustration of this process.

3

Planning a Siebel Email Response Deployment

This chapter covers planning a Siebel Email Response Deployment. It includes the following topics:

- [“Using the Siebel Email Response Tools and Resources”](#)
- [“Performing a Business Analysis for Your Siebel Email Response Deployment” on page 27](#)
- [“Gathering System Setup Information For Siebel Email Response” on page 30](#)

Using the Siebel Email Response Tools and Resources

This chapter provides tools and resources to help you implement Siebel Email Response. Setting up Siebel Email Response for your business will be easier if you:

- Use the planning tools provided.
- Follow recommendations, unless your business needs dictate otherwise.

This section provides instructions for business analysis and setup planning. Use information gathered during the business analysis and setup planning processes to set up Siebel Email Response after installation.

Instructions in each section tell you what needs to be done and why it needs to be done, and provide suggestions for obtaining answers and more information. Your answers will consist of data you will use to set up Siebel Email Response.

- **Business Analysis Planning.** This section helps you analyze your business needs by gathering business information before you set up Siebel Email Response.
- **Setup Planning.** This section helps you gather additional system information you need to set up Siebel Email Response.

Performing a Business Analysis for Your Siebel Email Response Deployment

Before you set up Siebel Email Response, analyze your company’s email business needs. Often Siebel Email Response products are deployed to meet the needs of one group within an organization. After additional research, other groups that may benefit from the capabilities of a Siebel Email Response product may be included.

1 Which groups in your organization have the largest email volume?

Groups with the largest email volume benefit most from using Siebel Email Response. Analyze all groups in your organization to determine which can benefit from using a Siebel Email Response product. Mail server administrators in your organization can help you identify the email addresses that are the most heavily used.

2 What email addresses will you use for Siebel Email Response?

Develop a list of current and/or new email addresses that you want to use for all groups that will use Siebel Email Response. Specify the email addresses you need to create to receive incoming email. Your mail server administrator can tell you what email addresses your company currently uses.

Each email address must be designated as receiving unstructured (free-form) or structured (keyword-based or Web-form) email.

3 Does your organization use structured (web-form) or unstructured (free-form) email messages?

If your company uses many structured email messages, you might want to use Siebel eService. This product can automate many of the processes solved with Web forms. For example, service request submissions or status updates can be automated with Siebel eService.

- **Web forms.** An example of a Web form is an order status form. Make a list of Web forms that you may use. If you currently use Web forms, gather examples with your standard responses.

A Web form saves time because no human interaction is necessary to respond to the initial email. However, it takes special skills and time to set up and maintain Web forms with their associated responses. You cannot use them in every situation, but they are useful to handle high-volume communications that require standard responses.

- **Free-form messages.** Examples of free-form messages are a free-form email request for a customer's order status and a free-form request for help with a product purchased from your company.

Agents have to respond to each free-form email individually.

When you set up your workflow processes, you will decide which workflow you want to use to process incoming messages, eMail Response - Process Message or eMail Response - Process Service Request.

4 What are the most frequently asked questions that you currently receive at each corporate email address?

Gather examples of the most common questions (with their responses) and estimate how many you receive of each. Templates can be modified, so you should concentrate on determining the most frequently asked questions you receive at present.

One of the most valuable features of any email response product is the ability to store templates that can be used by agents to respond to common questions.

You can identify questions that can be answered with templates by asking customer service agents for a list of the most commonly asked questions, including the appropriate response for each. Other sources of template candidates are FAQs (Frequently Asked Questions documents) that have been developed for your customers.

5 What solution documents do you currently use?

A solution document can be any document prepared for customers that provides a fix or a recommended approach to a problem.

See “[Solutions and Templates Decision Table](#)” to find out when to use solution documents (called FAQs in Siebel eService), when to use reply templates, and how each compares to a free-form reply.

Gather copies or make a list of these electronic documents and their network locations. Specify new documents that are needed and existing documents that can be converted to electronic documents.

6 What categories do you want to associate with templates and solutions?

Sort the templates and solutions from [Step 4](#) and [Step 5](#) into types of email questions (categories) and assign a category to each solution and template. During Siebel Email Response setup, you will associate solutions and templates with categories so that solutions and templates can be inserted into the body of Siebel Email Response replies.

NOTE: Only templates intended to be used as body templates should be associated to a category.

7 Who will be responsible for template maintenance and developing maintenance procedures?

Develop a process and specify a person to be responsible. Develop procedures for maintaining templates and notifying agents that new or changed templates are available and how templates are to be used.

You must review templates for changes if your business changes in some way. For example, when you launch a new product or discontinue a product, you may want to review the templates to determine whether they need updating. Another example would be adding the URL of a new Web site to the signature line of an email template.

8 Do you want to automatically acknowledge receipt of incoming mail?

An auto-acknowledge message sets reasonable customer expectations for a response and reduces the chance that customers will send follow-up emails or communicate through other channels.

If there is an existing auto-acknowledge message, obtain a copy. An auto-acknowledge message should thank the customer for the inquiry and tell the customer how long it will take to respond.

9 How are groups currently routing email messages? Why do you use the current routing approach?

Determine how each of your target email response deployments (such as, Sales or Call Center) currently routes an incoming email message to an agent best suited to handle the message. Most organizations simply have agents select email messages from a list of messages sent to a particular address. How are incoming email queues managed and why? Why do you use your current approach to email queues?

10 Which routing and queuing method meets your needs for email response?

When using Siebel Email Response, you can choose from several methods to route email messages to the correct agent. To review a comparison of different routing and queuing methods, see "[Routing and Queuing Methods Comparison Table](#)."

The method you use should be based on the way your business needs to route incoming mail. For example, if you need to notify agents immediately after routing a message, you need Siebel Universal Queuing or another universal queuing engine. For more information, see *Siebel Universal Queuing Administration Guide*.

If your contact center already has CTI software set up, you can use universal queuing technologies to make multiple media channels available to your agents. For example, customer service representatives may be dedicated to handling telephone calls, but when they are not busy with telephone calls, they can be assigned email messages.

11 Language Support.

- a** In what languages do your customers send email? In what languages do you reply using email?
- b** Do you have templates in multiple languages?

For additional information about supported languages, see *Siebel System Requirements and Supported Platforms* on Siebel SupportWeb.

12 Do you need to set up multiple organizations for your company?

Gathering System Setup Information For Siebel Email Response

In this section, you gather system setup information for Siebel Email Response by answering the following questions:

- 1** Do you have a working Siebel Systems environment installed and configured by the system administrator? (Prerequisite.)

For more information, see the *Siebel Server Installation Guide* for your operating system.

- 2** Has your email server been installed and configured? (Prerequisite.)

The email server should have been set up by the Communications Server administrator.

3 What communications drivers and profiles will you use for Siebel Email Response?

NOTE: You should use the Internet SMTP/POP3 Server driver for connecting to all supported email servers.

Create communications profile names that correspond to all the mailboxes that you will monitor. For example, support@siebel.com and sales@siebel.com.

To obtain communications driver parameters (settings), see *Siebel Communications Server Administration Guide*. Values assigned to driver parameters apply to every profile that uses that driver unless you add a profile parameter override value to a profile. Profile parameter overrides allow you to make each profile unique. These will be explained later in this checklist.

See *Siebel Communications Server Administration Guide* for more information about communications drivers, communications driver parameters, and communications driver profiles.

4 What profile parameter overrides and values need to be established for each profile (email address) assigned to the communications driver?

A profile parameter override is a setting that overrides the values on the driver used by the profile.

- If you do not supply a profile parameter override, the default parameter value is taken from the driver. Some required parameters do not have a default value, such as POP3 Account Name. You must provide values for all required parameters.
- If you supply a profile parameter override, the override value will be used instead of the parameter value on the driver.

Each profile has its own parameter overrides that are necessary to connect to the email server account. For example, a common parameter override is From Address. The From Address parameter is passed to the SMTP server as the address that will show in the From field in an email reply. Values you assign make each profile unique. You add profile parameter overrides during Siebel Email Response setup procedures. For more information about driver profiles and parameter overrides, see *Siebel Communications Server Administration Guide*.

5 Which email profiles (mailboxes) will receive Web-form messages and which will receive free-form messages?

Separate your email profiles into two groups, one to receive Web-form messages (such as, service requests) and one to receive free-form messages.

Take each of these two groups of email profiles and separate the profiles into groups that have the same types of email behaviors (input arguments). Each of these profiles will be associated with a single response group. Assign a meaningful name to each group.

These groups will be response groups and their associated profiles that you will create in [Chapter 4, "Completing Basic Setup Tasks."](#) Choose the following values for each group:

- **Name.** Choose a meaningful name for each response group.
- **Administrator email address.** Choose the email address to which you want to direct unprocessed email (email that cannot be processed due to database error, routing error, and so on) that is sent to profiles in each response group.

- **Description.** Describe the types of email behaviors each response group controls. This information prepares you to set up input arguments for each response group.

6 What email behaviors (input arguments) are needed for each profile type?

Input arguments provide information to a business service so it can process incoming email. Because input arguments control the way email is handled, all profiles in a response group must have the same input arguments.

Using the response group description from [Step 5](#), assign the input arguments for each group of email profiles. For a list of available input arguments, see ["Siebel Email Response and Business Services."](#)

7 Do you need to modify the workflows included with Siebel Email Response?

Even if you decide not to modify the predefined workflows, you must activate them in the Administration - Business Process screen before starting Siebel Server and receiving incoming email. For additional information about predefined workflows, see ["Using Siebel Email Response Workflow Processes"](#) in [Chapter 5, "Setting Up Siebel Email Response Workflows."](#)

CAUTION: If you modify a workflow, it will not be upgraded when you upgrade your Siebel application. You will need to recreate all modifications in the prebuilt workflows in the new version of your application.

For information about creating and modifying workflows, see *Siebel Business Process Designer Administration Guide*.

8 Which routing and queuing method will you use to route incoming email to agents?

By default, email messages are recorded in your database as activities or service requests.

Identify the routing and queuing methods you will use: manual assignment, Siebel Assignment Manager, Siebel Universal Queuing, or custom routing and queuing. See ["Routing and Queuing Methods Comparison Table"](#) for a description of the advantages and disadvantages of each.

See *Siebel Assignment Manager Administration Guide* and *Siebel Universal Queuing Administration Guide* for information about creating routing and queuing rules for each system.

9 Do you need to set up Siebel Smart Answer?

If you have purchased the Siebel Smart Answer module (optional), use *Siebel Smart Answer Administration Guide* to implement it.

10 Do you want to process emails using real time mode or nonreal-time mode?

Depending on your business requirements, you can set up Siebel Email Response for real-time or nonreal-time processing. For more information, see ["Processing Email in Real-Time"](#) on [page 24](#) and ["Processing Email in Nonreal-Time"](#) on [page 25](#).

11 Is your email server enabled for Secure Sockets Layer (SSL)?

Siebel Email Response allows the POP3 and SMTP drivers to work with email servers that are enabled for SSL. For more information, see ["Creating Secure Sockets Layer \(SSL\) Connections for SMTP and POP3 Drivers"](#) on [page 12](#).

4

Completing Basic Setup Tasks

This chapter covers completing basic setup tasks for Siebel Email Response. It includes the following topics:

- "Setting Up Siebel Email Response"
- "Performing Prerequisite Tasks for Siebel Email Response" on page 34
- "Performing Setup Tasks for Siebel Email Response" on page 35
- "Revising, Testing, and Activating Workflow Processes" on page 36
- "Implementing Routing and Queuing Processes" on page 38
- "Setting Up Communications Server for Siebel Email Response" on page 40
- "Creating Templates, Catalogs, and Categories" on page 51
- "Starting Siebel Email Response Server Tasks" on page 63
- "Enabling a Secure Sockets Layer (SSL) Connection for SMTP and POP3 Drivers" on page 68

Setting Up Siebel Email Response

Setting up Siebel Email Response for your business will be easier if you plan your setup using [Chapter 3, "Planning a Siebel Email Response Deployment,"](#) before you use the setup procedures in this chapter.

NOTE: Before implementing Siebel Email Response, you must provide your users with adequate training.

Prerequisite tasks. Your organization needs to complete some configuration and installation tasks before setting up Siebel Email Response. This section describes these tasks and tells you where you can find more information about them.

Basic setup instructions. This section provides step-by-step instructions for setting up Siebel Email Response using information you gathered in [Chapter 3, "Planning a Siebel Email Response Deployment."](#)

If you purchased the Siebel Smart Answer add-on module, use *Siebel Smart Answer Administration Guide* to implement Smart Answer after completing this chapter.

Performing Prerequisite Tasks for Siebel Email Response

This section describes the tasks that need to be completed before you set up Siebel Email Response. See *Siebel System Requirements and Supported Platforms* on Siebel SupportWeb for specific system requirements, such as names of supported email servers.

Before you attempt to set up Siebel Email Response, confirm that the following tasks have been completed. Your network administrator can help identify who in your organization performs each task.

- **Siebel Server is installed.** For more information, see the *Siebel Server Installation Guide* for your operating system.

You must have a working Siebel Systems environment installed and configured by the system administrator before setting up Siebel Email Response.

- During the Siebel Server installation, the following items are installed and configured:
 - Database server
 - Gateway server
 - Siebel Server
 - Siebel eBusiness Application Integration (if you will use a universal queuing application)
 - Siebel Web Server Extension (EAppWeb)
- During the Siebel Server installation, the following components are enabled:
 - Communications Management includes (Communications Inbound Receiver, Communications Inbound Processor, and Communications Outbound Manager)
 - Siebel Call Center (includes Siebel Email Response, Siebel Smart Answer, and Siebel Service)

Component groups can also be enabled after the Siebel server installation.

- During the Siebel Server installation, the spell check feature is installed.

The spell check feature is automatically installed and enabled as part of the Siebel Server and Mobile Web Client installation processes. Spell Check dictionaries are installed in several languages. For a list of supported languages, see *Siebel System Requirements and Supported Platforms* on Siebel SupportWeb.

- **Siebel Universal Queuing is installed (optional).** If you have chosen to use Siebel Universal Queuing or a third-party universal queuing application, install and configure it using the application documentation. For information about Siebel Universal Queuing, see *Siebel Universal Queuing Administration Guide*.
- **The email server is installed, configured, and tested.** For installation and configuration information, see the installation instructions you received with your email server. See *Siebel System Requirements and Supported Platforms* on Siebel SupportWeb for a list of supported email servers.

- **Basic tests are performed.** Before you set up Siebel Email Response, perform the following tests:
 - Verify network connectivity by establishing the presence of the email server from the Siebel Server.
 - Test the email server, and make sure your email server is properly set up. To do this, verify that you can communicate to and from each email account you create. For each email account, you can use any email client to:
 - Set up test accounts
 - Send email from each test account to itself
 - Send email from each test account to an account outside your company

Performing Setup Tasks for Siebel Email Response

You must complete the following tasks before you can use Siebel Email Response.

- **Revise and test workflow processes.** Workflow processes from the Siebel Business Process Designer control the way incoming email is processed. All revisions and tests of workflow processes are done through Siebel Tools. For information on revising workflow processes, see [“Revising Workflow Processes” on page 37](#). For information on testing workflow processes, see [“Testing Workflow Processes” on page 37](#).
- **Activate workflow processes.** Once you have completed your revisions, you need to activate the workflow processes in your Siebel Email Response application. For information on activating workflow processes, see [“Activating Workflow Processes” on page 38](#).
- **Implement your routing and queuing application.** Tasks depend on the routing and queuing application you choose to implement. You can choose one of the following applications:
 - Use Siebel Assignment Manager to create new assignment rules that route email to an agent who has the appropriate skills.
 - Use Siebel Universal Queuing to create an email channel, routes, and escalation rules, and associate escalation rules with routes.

NOTE: If you have chosen to use a third-party routing and queuing product, consult that product’s documentation for implementation instructions.
- **Set up Communications Server for Siebel Email Response.** You use the Administration - Communications screen to assign values to communications driver fields (such as, email server name) and create Siebel Email Response driver profiles and response groups. The server components you will use are Communications Inbound Receiver (for receiving email), Communications Inbound Processor (for processing emails in nonreal-time mode) and Communications Outbound Manager (for replying to emails).
- **Create templates, a catalog, and categories.** Use the Administration - Communications screen to create templates. Use the Administration - Catalog screen to create a catalog and categories. This includes associating templates and solutions with categories.

- **Start the server components.** Depending on your server architecture, start one or more of the following server components:
 - Communications Inbound Receiver
 - Communications Inbound Receiver and Communications Inbound Processor (if you are using nonreal-time email processing)
 - Communications Outbound Manager (for either real-time or nonreal-time email processing)
- If you make any changes (other than profile or response group changes) to your Siebel Email Response setup after implementation, you must stop and restart the Communications Inbound Receiver, Communications Inbound Processor, and Communications Outbound Manager server components so that your changes take effect. If you make profile or response group changes, you can submit them without stopping the server components. For information on submitting profile, see ["Submitting Profile Changes" on page 45](#). For information on submitting response group changes, see ["Submitting Response Group Changes" on page 50](#).
- If you purchase Siebel Smart Answer (optional module), set it up using *Siebel Smart Answer Administration Guide* after you complete your Siebel Email Response setup.

Revising, Testing, and Activating Workflow Processes

Siebel Email Response comes with a number of predefined workflow processes, which allow organizations to deploy Siebel Email Response without having to create an entire workflow. Some organizations may want to use one or more of these workflows with a few modifications. An organization with complex needs might want to revise one of the existing workflows or create its own custom workflow. See *Siebel Business Process Designer Administration Guide* for information about creating or revising a workflow process. You activate workflows in the Repository Definitions view under the Administration - Business Process screen.

Determining Workflow Status

Workflows are shipped with a status of *Completed*. You may want to make changes to the workflows, but it is not required. A workflow can have the following status:

- **Completed.** Preconfigured Siebel Email Response workflows have a status of *Completed*. *Completed* workflows must be activated before they can be used.
- **In Progress.** You must change the status of a workflow process to *In Progress* before you can make changes to it.
- **Active.** An activated workflow will be used to process Siebel Email Response work items. Only one workflow for each process can be active.

Setting the Workflow Step Execution Log Level

The Workflow Step Execution Log Level allows you to follow the steps in a workflow as it processes an email. The following procedure describes how to set the Workflow Step Execution Log Level.

To set the Workflow Step Execution Log Level

- 1** From the application-level menu, choose Navigate > Site Map > Administration - Server Configuration > Servers.
- 2** In the Siebel Servers list, select the server containing the workflow whose status you want to check.
- 3** Click the Components view tab.
- 4** Perform a query for *Communications Inbound Receiver*.
- 5** In the Components list, select the *Communications Inbound Receiver*.
- 6** Click the Events subview tab.
- 7** In the Event Type list, perform a query for Workflow Step Execution.
- 8** Select Workflow Step Execution and set the log level to 5.

Revising Workflow Processes

Some organizations may want to use one or more of these workflows with a few modifications. An organization with complex needs might want to revise one of the existing workflows or create its own custom workflow. See *Siebel Business Process Designer Administration Guide* for information about creating or revising a workflow process. The following procedure describes how to revise a workflow process.

To revise a workflow process

- 1** In the Siebel Tools Object Explorer, select the Workflow Processes object.
- 2** In the Workflow Processes list, perform a query for Process Name = *eMail**.
- 3** In the Workflow Process list, select the workflow process you want to change and click Revise.
The status of the workflow process changes to *In Progress*.
- 4** Right-click the workflow process you want to change and choose Edit Workflow Process.
The Business Process Designer appears.
- 5** In the Business Process Designer, make your changes to the workflow process and return to Siebel Tools.
- 6** Right-click the workflow process you have made changes to and choose Validate...
- 7** In the Workflow Processes list, select the workflow process you have made changes to and click Deploy.

Testing Workflow Processes

Before activating a workflow process, you can test it to make sure the workflow is functioning correctly.

To test a workflow process

- 1 In the Siebel Tools Object Explorer, select the Workflow Processes object.
- 2 In the Workflow Processes list, perform a query for Process Name = *eMail**.
- 3 Right-click the workflow process you want to test and choose Simulate Workflow Process.

Activating Workflow Processes

You must activate all Siebel Email Response workflows *before* starting Siebel Email Response. From the application you can *only* view and activate workflow processes. If you want to make changes to the workflow processes you must use Siebel Tools. A server parameter (Workflow Version Checking Interval) controls how often the server component checks for recently activated versions of each process definition. Workflows are refreshed approximately every hour. After each refresh, recently activated workflows are available. For a list of predefined Siebel Email Response workflows, see [Chapter 5, "Setting Up Siebel Email Response Workflows."](#)

You activate workflow processes by completing the following procedure.

To activate workflow processes

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Business Process > Workflow Deployment.
- 2 In the Repository Workflow Processes list, perform a query for Siebel Email Response workflow processes with a status of *Completed*.
- 3 Select the workflow process you want to activate and click Activate.

In the Repository Workflow Processes list, the Status of the workflow processes changes to *Active*.
- 4 Repeat [Step 1](#) through [Step 3](#) for each Siebel Email Response predefined workflow you want to use. For a list of predefined Siebel Email Response workflows, see ["To see a list of preconfigured Siebel Email Response workflows" on page 71](#).

Implementing Routing and Queuing Processes

Siebel Email Response workflows record incoming emails in your database, except for messages identified as junk email. The eMail Response - Process Message workflow creates an activity record and the eMail Response - Process Service Request workflow creates a service request record.

The Process Message and the Process Service Request workflows can use the routing and queuing features in Siebel Assignment Manager and Siebel Universal Queuing to further automate your email interactions. Routing and queuing application choices include Siebel Assignment Manager, Siebel Universal Queuing, and third-party universal queuing applications. See [Step 9](#), where you determined the routing and queuing method you will implement.

Siebel Assignment Manager can assign ownership of email activities and service requests. Siebel Universal Queuing can queue an email to a specific individual based on real-time analysis of agent availability, agent skills, language, and variety of other routing and escalation attributes.

Your organization can use the preconfigured routing and queuing rules provided by Siebel Email Response, revise the preconfigured rules, or create new rules. Before you start Siebel Email Response and process your incoming email messages, you must activate the Siebel Email Response workflows, make changes to the routing and queuing method you choose to implement, and start the server tasks associated with that routing and queuing method.

You can route email in one of the following ways:

- **Manual assignment.** A person dedicated to the routing process manually assigns each incoming email to an agent as it arrives, or agents select a message from a message queue.
- **Siebel Assignment Manager.** You can use Assignment Manager to assign emails by setting the Enable Assignment Manager process property in the Email Response - Process Message workflow in the following ways:
 - Assignment Manager will assign emails for all response groups if you set the process property to TRUE.
 - Assignment Manager will assign emails for a specific response group if you set the process property to TRUE for that response group.

After enabling Assignment Manager, you use information in *Siebel Assignment Manager Administration Guide* to:

- Verify that each employee in your database has been assigned the appropriate skills to respond to incoming email. For example, you might assign each employee an email recipient address and define competencies, expertise level, and exception hours.
 - Set up the service regions and associate each employee with a service region.
 - Create new assignment rules, assign criteria, define employees, and release the rules.
 - Activate Territory Assignment Manager.
 - Test your Territory Assignment Manager setup.
- **Siebel Universal Queuing or a third-party universal queuing product.** You can use UQ to assign emails by setting the Enable Universal Queuing process property in the eMail Response - Process Message workflow in the following ways:
 - UQ will route and escalate emails for all response groups if you set the process property to TRUE.
 - UQ will route and escalate emails for a specific response group if you set the process property to TRUE for that response group.

After enabling UQ, use information in *Siebel Universal Queuing Administration Guide* to perform the following tasks in the UQ Administration screen:

- In the Channels view, create one email channel and add properties. Two properties can be used for Siebel Email Response channels: Receiver Address and Sender Address.
- In the Routes view, create routes, escalations, and escalation rules and associate escalation rules with routes.

- Routes define high-level criteria such as route priority and service-level times.
- An escalation step defines the time an email can wait in queue before it is passed to the next step. Steps are assigned an order number to control the escalation sequence.
- Escalation rules establish the criteria that determine the agent skills (such as language and level of product knowledge) that are necessary to handle each escalation step.
- In the Employees view, for each employee, assign skills, employee competencies for each skill, expertise for each competency, and the number of simultaneous sessions the employee can have open.
 - Assign skill categories such as language, employee competencies, and expertise for each competency, such as French (Expert) and English (Novice).
 - Select the email channel and assign the maximum number of email items (Simultaneous Sessions) for a specific channel that an agent can be assigned at any given time. This number must be at least 1 for the agent to receive email for the email channel. When set to 1, an agent can receive a maximum of one work item at a time for that channel.
- Activate UQ and test your UQ setup.

Setting Up Communications Server for Siebel Email Response

Siebel Communications Server supports many communication channels used to communicate with customers through server components including Communications Inbound Receiver, Communications Inbound Processor, and Communications Outbound Manager.

NOTE: If you ever need to change the number of tasks or threads for Communications Inbound Receiver, be aware that *Maximum Tasks* should always be greater than *Maximum Threads*.

Setting Up Communications Server for Real-Time Email Processing

When you use real-time email processing, you are only using one server component, the Communications Inbound Receiver, to receive and process email. The Communications Inbound Receiver monitors email accounts (email addresses) by using communications driver profiles to check for inbound messages. When an inbound email is detected, the Communications Inbound Receiver receives the email message and sends it through the Workflow Process Manager for processing. After the email has been processed and an activity created, the message is either stored in the database (if it is less than 16K) or the Siebel File System (if the email is larger than 16K). The role of the SRB Listener is to receive inbound requests from some other component. For example, when you submit profile or response group changes, the SRB executes these commands.

Setting Up Communications Server for Nonreal-Time Email Processing

When you use nonreal-time email processing, the Communications Inbound Receiver monitors email accounts (email addresses) by using communications driver profiles to check for inbound messages. When an inbound email is detected, Communications Inbound Receiver pulls the email from the email server, converts it into event data, and creates an SRM request to inform Communications Inbound Processor that a new event has been created. Communications Inbound Processor uses workflows to process and routes the event. Communications Outbound Manager uses communications driver profiles to handle outbound communications to customers.

You set up communications drivers and profiles to connect the communications server to your email server.

Communications drivers. Drivers specify the protocol used to access the email server, and driver parameters control the behavior of each driver. For example, the Internet SMTP/POP3 Server driver logs in to the POP3 server and checks for new mail at an interval set in the PollingInterval driver parameter.

You can use the same communications driver for different purposes. For example, you can associate the same communications driver to perform the following tasks:

- Monitor multiple email accounts (addresses).
- Monitor email addresses for other departments in your organization, such as an eMarketing outbound campaign.

NOTE: Although you can use the same communications driver for multiple purposes, make sure that you set up a unique email address and response group for each group and purpose.

CAUTION: Changes made to a communications driver's parameters affect everyone who uses that driver. Therefore, the person in your organization who maintains communications drivers should make or approve all changes. See *Siebel Communications Server Administration Guide* for more information.

Communications driver profile. A driver profile specifies a specific mailbox for monitoring and rules (profile parameter overrides) for the way the driver should behave while monitoring that mailbox.

Communications drivers and profiles used for Siebel Email Response allow Communications Inbound Receiver to monitor mailboxes for inbound messages. Other communications channels, such as voice use different communications drivers and profile types.

Each communications driver profile used by Siebel Email Response processes both incoming and outgoing email. Therefore, each driver profile should be configured for both.

To set up Communications Server for Siebel Email Response:

- Set up your communications driver parameters to establish defaults for all profiles using this driver.
- Create a communications driver profile for each email account that Siebel Email Response will monitor (includes creating profile parameter overrides).
- Create at least one response group (includes creating input arguments and associating a profile with a response group).

To accomplish these tasks, use this chapter and *Siebel Communications Server Administration Guide*.

Setting Up Communications Driver Parameters

Siebel Email Response uses the Internet SMTP/POP3 Server driver for sending and receiving email messages. The Internet SMTP/POP3 Server driver has a number of driver parameters that define the default behavior of this driver. Organizations may have multiple mailboxes they wish to monitor such as support@siebel.com, sales@siebel.com, and marketing@siebel.com. These mailboxes can share common parameters. For example, support@siebel.com, sales@siebel.com, and marketing@siebel.com might have the same SMTP Server and POP3 Server parameter (mail.siebel.com). For more information, see ["How the Internet SMTP/POP3 Driver Processes Email Messages."](#)

The administrator can set default driver parameters for the SMTP/POP3 driver, instead of setting these values for each profile they create. If, however, the administrator has another mailbox (such as support-japan@siebel.com) that is on a different POP3 server and SMTP server (such as japan.siebel.com), the administrator has to create profile parameter overrides for POP3 and SMTP Server only for the support-japan@siebel.com profile.

The most common driver parameters that an administrator might change are parameters that are relatively consistent across most of an organization's mailboxes, such as those for the SMTP Server and POP3 Server, or parameters that need to be changed occasionally for all profiles. For example, if an administrator is troubleshooting the communications setup and wants to turn on debug logging, the administrator changes the LogDebug parameter to TRUE.

The administrator can set up a SMTP backup server, the host name or IP address of the machine on which the backup Internet SMTP server is running, as appropriate for your network configuration. This parameter is used when you have implemented a failover strategy for your SMTP server handling outbound email or fax communications. For more information, see *Siebel Communications Server Administration Guide*.

To set up your communications driver parameters, see *Siebel Communications Server Administration Guide*.

NOTE: To make sure you use a supported communications driver, see *Siebel System Requirements and Supported Platforms* on Siebel SupportWeb for specific system requirements.

Understanding Communications Driver Profiles

Siebel Communications Server profiles map to individual accounts or mailboxes on a server. For example, support@siebel.com or info@siebel.com are valid accounts to which a profile can be mapped.

Because you can use the same driver for many different profiles, you must create a unique profile to differentiate each of your email server accounts. For example, support@siebel.com and info@siebel.com must have separate profiles. Although you can use any name you choose, it is recommended that you use the email address as the profile name. This makes each profile easier to identify.

You can determine what email profiles are available in the From drop-down list on an email reply by associating profiles with responsibilities. For example, you might want your support representatives to send replies only from support@siebel.com and your marketing representatives to send replies only from info@siebel.com. To accomplish this, create a responsibility for each group and associate each profile and agent with the appropriate responsibility.

Each profile has parameter overrides that assign unique behaviors to it. For example, a common parameter override is Mail Password. The instructions in this section provide basic information for creating a communications driver profile. For more detail, see *Siebel Communications Server Administration Guide*.

NOTE: Repeat the following procedures for *each* Siebel Email Response mailbox. For more information, see *Siebel Communications Server Administration Guide*.

To create a communications profile, complete the following tasks in the order presented:

- 1 [Creating a Communications Driver Profile](#)
- 2 [Assigning Parameter Overrides for a Communications Profile](#)
- 3 [Submitting Profile Changes](#)

CAUTION: To delete a profile, you should delete it only from the response group. Do not delete it from the Profiles list because Communications Outbound Manager might be using it to send a message and emails could be lost.

Creating a Communications Driver Profile

When creating a communications profile, you must first create a communications driver profile. You can create a communications driver profile by completing the following procedure.

To create a communications driver profile

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Communications > Communications Drivers and Profiles.

The Communications Drivers list appears.

- 2 In the Communications Drivers list, select the Internet SMTP/POP3 Server driver.
- 3 Click the Profiles tab.
- 4 In the Profiles list, click New.
- 5 Using information gathered during the planning process, complete the necessary fields to add a profile. Use the values you chose in "[Gathering System Setup Information For Siebel Email Response](#)."

See the table at the end of this procedure for profile field descriptions.

- a In the Name field, type the name of the profile you want to add.
- b Select an organization to associate with the profile.
 - If your company has only one organization, do not change the default value.

- If your company has multiple organizations, click the select button and select the appropriate organization in the Pick Organization dialog box.
- c To assign the appropriate responsibilities, click the select button and select the responsibilities needed for this profile in the Responsibilities dialog box.

Field Name	Default Value	Description
Name		Required. The name of the profile (the mailbox you want to monitor). It is recommended that you use the email address as the profile name.
Organization	Default Organization	Required. When an email sender has contact records that exist in multiple organizations, Siebel Email Response can use the organization ID on the receiving profile to look up the sender. To make this possible, you must add an input argument called Lookup Sender By Organization to the response group and set the value to TRUE. This value also dictates which profile is being shown in the picklist.
Responsibilities		Optional. Determines what email profiles show in the From drop-down list on an email reply. Only the email profiles associated with these responsibilities show for users whose personal profiles contain the same responsibilities.

Assigning Parameter Overrides for a Communications Profile

The next task is to assign parameter overrides for the profile. Some driver parameters have no default value. If a parameter is required, you must assign the value as a profile parameter override when you create the profile. This is what determines whether a profile would be shown as owner, same organization, or one of responsibility.

To assign parameter overrides for a profile

- 1 In the Profiles list, make sure you have selected the appropriate profile.
- 2 In the Profile Parameter Overrides list, click New.
- 3 Using information gathered during the planning process, add the necessary parameter override fields. Use the values you chose in ["Gathering System Setup Information For Siebel Email Response."](#)
 - a In the Name drop-down list, select the name of the driver parameter for which you want to change the value.

If you cannot see the entire name in the drop-down list, pass your cursor over it to make the full name appear.
 - b Complete the Value field.
 - c Repeat for each profile parameter override.

Submitting Profile Changes

The final step in creating a communications profile is to submit any profile changes. When you submit profile changes, you *unload* the profile and profile configuration settings from all response groups that are loaded with the profile. You also *load* the profile in all of the response groups that are configured with the profile.

You should submit profile changes in the following situations:

- If you have only changed the communication profile parameters (or the underlying driver parameters) on a communications profile that is currently loaded by at least one response group.
NOTE: If you submit profile changes for a communication profile that is not loaded by a response group, nothing will happen.
- If you have removed a profile from a response group and you only want the profile to be unloaded without unloading and reloading all of the other profiles. To accomplish this, remove the profile from the response group and then submit profile changes. This causes the response group to unload the profile.
- If you want to move a communication profile from one response group to another you have to remove the profile from one response group do a submit and then add the same profile to another response group and do a submit. By submitting profile changes you cause the communication profile to stop executing in one response group (the one you moved the communication profile *from*) and start executing in the other response group (the one you moved the communication profile *to*).

You can submit profile changes by completing the following procedure.

To submit profile changes

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Communications > Communications Drivers and Profiles.
- 2 In the Communications Drivers list, select Internet SMTP/POP3 Server.
- 3 Click the Profiles tab.
- 4 In the Profiles Menu drop-down list, select Submit Profile Changes.

Setting Up a Response Group

A response group defines behaviors (input arguments) for one or more profiles. Communications Inbound Receiver processes each item based on the input arguments in the response group. When Communications Inbound Receiver starts, it searches for all active response groups and starts them. Because Siebel Email Response processes are managed by Siebel Business Process Designer, response groups use the Workflow Process Manager business service and the RunProcess method for Siebel Email Response work items as defaults.

You begin the setup process by first creating a response group. Then, you assign input arguments that tell Communications Inbound Receiver how to monitor incoming mail for all profiles in the response group. Input arguments allow you to define auto-acknowledgment messages, error messages, and business component fields. Each response group method has different input argument settings.

NOTE: You cannot change the method name of a response group after you generate input arguments.

If you want to make changes to a response group or profile, see ["Making Changes to Response Groups and Profiles" on page 49](#). After making any changes to a response group or profile, you must submit the response group changes for them to take effect.

The final task in setting up response groups is associating the response group with profiles (email addresses). All mail sent to these profiles will be handled as specified by the input arguments assigned to the response group.

CAUTION: A profile should not be associated with more than one active response group or messages may be lost.

To set up response groups, perform the following tasks in the order in which they are presented:

- [Creating a Response Group](#)
- [Adding Input Arguments to a Response Group](#)
- [Associating Profiles with a Response Group](#)
- [Making Changes to Response Groups and Profiles](#)
- [Submitting Response Group Changes](#)
- [Starting a Response Group](#)

CAUTION: When deleting a response group, you should only delete it from the response group. Do *not* delete it from the Profiles list because Communications Outbound Manager might be using it to send a message and emails could be lost.

Creating a Response Group

The first task is to create a response group.

To create a response group

- 1** From the application-level menu, choose Navigate > Site Map > Administration - Communications > All Response Groups.
- 2** In the Response Groups form, click New.

- Using information gathered during the planning process, complete the necessary response group fields from the table below.

Use [Table 3](#) to complete the response group fields.

Table 3. Response Group Fields

Name	Default Value	Description
Name		Required. The name of the response group.
Service Name	Workflow Process Manager	Required. Do not change.
Method Name	RunProcess	Required. Do not change.
Administrator Email Address		Optional. You should change this value. The email address to which a notification is sent when server errors occur.
Description		Optional. A field to enter notes about this response group. It is recommended that you the behaviors that apply to all profiles in this response group.

Adding Input Arguments to a Response Group

The next task in setting up a response group is to add input arguments to the response group.

To add input arguments to a response group

- Click the Input Arguments view tab.

- 2 In the Input Arguments list, click Generate Defaults.

Default input arguments appear on the Input Arguments list.

Default input arguments are based on the business service method. For a list of Siebel Email Response process properties used as input arguments, see ["Modifying Frequently Used Siebel Email Response Process Properties."](#) For more information about frequently used input arguments, see [Chapter 5, "Setting Up Siebel Email Response Workflows."](#)

Table 4 lists the input arguments for response groups.

Table 4. Input Arguments For Response Groups

Name	Type	Description
Process Name	Email Response - Process Message	Required field. The name of the workflow process that processes Siebel Email Response inbound messages. Change to Email Response - Process Service Request for keyword-based response groups.
		Required field. Default input argument. Not used.
Catalog Name	String	Required field. Kilobyte name to be used in Smart Answer.
Disable Send Acknowledgment	TRUE or FALSE	Default value is FALSE. If you change this input argument to True, no acknowledgement will be sent.
Enable Assignment Manager	TRUE or FALSE	Default value is FALSE.
Enable Universal Queuing	TRUE or FALSE	Default value is FALSE.
Enable Lookup Sender By Organization	TRUE or FALSE	Default value is FALSE.
Enable Test Mode	TRUE or FALSE	Default value is FALSE.
Real Time	TRUE or FALSE	
MsgDefaultLanguageCode		Input argument for the default language of the email message.

- 3 Select the eMail Response - Process Message workflow, and add the Catalog Name input argument:
 - a In the Input Argument list, click New.
 - b In the Name field, type Catalog Name.

- c In the Value field, type the catalog name.
You will create this catalog and its categories in the procedure named ["To create a catalog for the Email Response - Process Message workflow."](#)
- 4 Add other new input arguments using information gathered during the planning process. Use the values you chose in ["Gathering System Setup Information For Siebel Email Response"](#) on page 30.
 - a Click New.
 - b Type the name and value of the input argument exactly as they appear in the tables in ["Siebel Email Response and Business Services."](#)
- 5 To delete an input argument record, click Delete.

Associating Profiles with a Response Group

The next task you must perform is to associate profiles with the response group.

To associate profiles with a response group

- 1 Click the Profiles view tab.
- 2 In the Profiles list, click New.
The Add Communication Profiles dialog box appears, listing existing profiles.
- 3 In the Add Communication Profiles dialog box, select profiles you identified in ["Gathering System Setup Information For Siebel Email Response."](#)
Only profiles you have added will display on the list. To add more profiles, see ["To create a communications driver profile."](#)
- 4 Click the drop-down arrow to view and select additional profiles.
- 5 Click OK to associate the selected profiles with the response group.
The profiles appear in the Profiles list.

Making Changes to Response Groups and Profiles

Most of the changes that you can make to a response group do not automatically take effect. To have a change take effect, you must click Submit Response Group Changes (for response group changes) or Submit Profile Changes (for profile changes) from the File menu. The one change that *does* automatically take effect is **deleting** a response group.

The types of changes you can make are:

- Adding or deleting a profile
- Changing an input argument
- Changing a workflow

NOTE: The Submit Response Group menu item does not work on the Siebel Mobile Web Client.

Submitting Response Group Changes

If you make changes to the response group input parameters, add a profile to the response group, or remove a profile from the response group, you must submit the response group changes for them to take effect.

To submit response group changes

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Communications > All Response Groups.
- 2 In the Response Group list, select the response group to which you want to make changes.
- 3 Click the Response Group view tab.
- 4 In the Response Group form, verify the following fields:

Field	Value
Server	<Siebel Server name>
Startup	Active

- 5 In the Response Groups menu drop-down list, select Submit Response Group Changes.

Starting a Response Group

You can choose to manually or automatically start a response group.

Manually Starting a Response Group

Complete the following procedure to manually start a response group.

To manually start a response group

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Communications > All Response Groups.
- 2 In the Response Group list, select the response group you want to start.
- 3 In the Response Groups menu drop-down list, select Submit Response Group Changes.

Automatically Starting a Response Group

When Communications Inbound Receiver starts, it looks at the *Active and Server* field to determine whether a response group should be started or not. When the response group status changes from *Blank/Manual* to *Active*, the change will be picked up by Communications Inbound Receiver and the response group will be started.

NOTE: There is one component task for each response group. If you have two or more response groups, two or more component tasks will be started automatically.

Communications Inbound Receiver can start multiple component tasks, one for each response group. Each task has multiple subtasks, representing a workflow thread that can process inbound messages.

Creating Templates, Catalogs, and Categories

Templates allow agents to respond to inbound email messages by using templates, messages that have already been created and approved for specific situations. Your initial templates can be created at any time during the planning process and can be modified or new ones added any time after implementation.

NOTE: Usually your database contains the same repository data as the SRF file. However, if you create templates on a local database, such as on a mobile Web client, they will be available in the picklist only when you access the local database.

The templates that appear to an agent depend on the agent's Outbound Communications user preference settings and how the templates are filtered. For more information about setting user preferences, see *Applications Administration Guide*. Templates are filtered in the following ways:

A catalog is the name you give to a group of categories. You can define one or more catalogs for use by Siebel Email Response as follows:

- You need only one catalog if everyone in your organization can share the same categories.
- You need multiple catalogs if some categories cannot be used by everyone in your organization.

A company could have two groups that share one catalog and a third group that has its own catalog.

A catalog must be defined as a response group input argument. It contains categories that you can associate with templates and solutions. During the planning process, you gathered and categorized templates and solutions.

Templates and solutions that contain answers to similar questions are associated with a single category. When agents use categories, they do not have to look through all templates and solutions to find the information that they want to send to a customer. They can use Search Center to look through the templates and solutions that are grouped in the appropriate categories. To use Search Center for this purpose, the categories have to be indexed. For information, see *Siebel Search Administration Guide*.

Using Substitution Fields in Siebel Email Response Templates

Templates can include template substitution fields that obtain data directly from your database, such as a customer name or a service request status. You insert a substitution field by selecting it in the Available Substitutions list, copying the substitution, and pasting it into the Template Text field at the place where you want the value to appear. In a template, you can use substitution fields from only one recipient group.

Setting Up Workflow to Use Substitution Fields

Templates in Siebel Email Response can include substitution fields from any business component that has a correctly configured relationship to the Communications Outbound Email Business Component. Business components with this relationship include Account, Campaign, Contact, Opportunity, and Service Request.

Before you attempt to set up templates that include substitution fields other than the default active business component, you must modify the Email Response - Response Workflow.

To set up Siebel Email Response templates substitution fields

- 1 In the Siebel Tools Object Explorer, select the Workflow Processes object.
- 2 In the Workflow Processes list, perform a query for *eMail Response - Response Workflow*.
- 3 In the Workflow Processes list, select *eMail Response - Response Workflow*, and click Revise.
- 4 In the Workflow Processes list, right-click *eMail Response - Response Workflow* and choose Edit Workflow Process.

The Business Process Designer appears.

- 5 Right-click the Get Response Text business service step and choose Show Input Arguments.
- 6 In the Input Arguments list, add the following input arguments:

Input Argument	Type	Value	Property Name
ActivityBusComp	Literal	Action	
ActivityBusObj	Literal	Action	
SourceId	Process Property		Object Id

- 7 Right-click the Expand Template Text business service step and choose Show Input Arguments.
- 8 In the Input Arguments list, add the following input argument:

Input Argument	Type	Value	Property Name
Expand Template	Literal	Y	

- 9 In the History Toolbar, click Back to return to Siebel Tools.
- 10 In the Workflow Processes list, right-click *eMail Response - Response Workflow* and choose Validate...
- 11 In the Workflow Processes list, select *eMail Response - Response Workflow* and click Deploy.

NOTE: Additional business components can be enabled for template substitutions using Siebel Tools. For information, see *Using Siebel Tools*.

Enabling Additional Business Components to Use as Substitutions

Recipient groups are based on business objects. When you create a template, you associate it with a recipient group. Siebel Email Response checks the recipient group assigned to the template to determine the associated business object. For example, the Service Request Contact recipient group is based on the Service Request business object and the Opportunity Sales Team recipient group is based on the Opportunity business object. Fields from any business component can be used as substitution fields in any template.

Siebel Email Response looks at the Communications Outbound Email business component's user properties for a record that describes the relationship between the Communications Outbound Email business component and the Target business component. The following record shows that the Communications Outbound Email business component is related to the Account BO, using the Account Id field.

Source Id Field: Account = Account Id

Other business components can be enabled for substitutions by associating the Target business component with the Communications Outbound Email business component and then creating a new User Property on the business component. See the following example:

Customers may wish to configure the Quotes business component. To add the Quotes business component, they create the necessary links in tools and add the following User Property entry:

Source Id Field: Quotes = Quote Id

Quotes is the name of the business component and Quote Id is the name of the foreign key between Communications Outbound Email and Quotes.

To use solutions and create templates, catalogs, and categories, perform the following tasks:

- Create solutions and email templates.
- Create a catalog and categories.
- Associate templates and solutions with categories.

To accomplish these tasks, use this chapter and *Siebel Communications Server Administration Guide*.

Using Solutions and Creating Email Templates

Solutions and Templates objects can be used as templates in Siebel Email Response. They can provide answers to frequently asked questions. To help you determine when to use solutions, when to use templates, and how each compares to a free-form reply, see "[Solutions and Templates Decision Table](#)."

Using Solutions

Solutions appear to customers over the Web through Siebel eService, and to employees through products such as Siebel Call Center. They should be used for answers to questions that can be shared across customer communications channels. For information about creating and storing solutions, see *Applications Administration Guide*.

You may discover that some questions received in email and service requests have been asked and answered many times. Storing responses to frequently asked questions allows you to reuse the answers without having to perform duplicate research. See *Applications Administration Guide* for information about creating and storing solutions.

Siebel Email Response uses solutions as a type of template that does not have substitution fields. Solutions should contain information and instructions for customers that are shared across departments or channels. When you maintain information in one place, maintenance is kept to a minimum and customers receive the most current information.

Solutions can be imported into the body of a Siebel Email Response reply when you associate them with a category. An agent can use solutions when responding to telephone, email, and service requests.

NOTE: If your solutions are going to be shared between Siebel Email Response and eService, and if they contain URLs or other HTML tags, be sure to enable HTML formatting for Siebel Email Response. HTML formatting is enabled in the User Preferences screen, Outbound Communications view. For more information about enabling HTML formatting for Siebel Email Response, see *Applications Administration Guide*.

Creating Email Templates

There are Simple templates and Advanced templates. Siebel Email Response only uses Simple templates. Therefore, this guide provides information about creating a Simple template. Templates can include template substitution fields that bring in data directly from your database. For information about using substitution fields, see ["Using Substitution Fields in Siebel Email Response Templates."](#) For information about templates, see *Siebel Communications Server Administration Guide*.

Templates are shared by many Siebel products, including the following:

- Siebel Email Response
- Siebel eMarketing
- Siebel Business Process Designer
- Send Email
- Send Fax
- Send Page
- Send Wireless Message

This section focuses on creating templates for use in Siebel Email Response.

Creating a Simple Template

Complete the following procedure to create a Simple template.

To create a Simple template

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Communications > All Templates.
- 2 In the Templates list, click New.
NOTE: See Table 5 on page 55 for default values and descriptions of template fields.
- 3 In the Templates list, complete the Name, Channel Type, and Description fields.
- 4 Click the Advanced view tab and in the Templates form use the template information gathered from “Performing a Business Analysis for Your Siebel Email Response Deployment” on page 27 to complete the necessary fields.

Table 5 lists the default values and descriptions of template fields.

NOTE: Be sure to notify agents whenever a template has been added or modified and provide instructions on how to use the new or revised template.

Table 5. Template Field Default Values and Descriptions

Field Name	Default Value	Description
Name		Required. Name of the template. Choose a name that clearly identifies the template’s purpose.
Channel Type	Email	Required. Communications channel that will use this template. Always use Email for Siebel Email Response. Other channel types are Fax, Wireless, and Page.
Subject	Do not use for Siebel Email Response.	System-filled. In Siebel Email Response, if you put a value in this field when creating the template, this value will be overwritten with the subject of the incoming email in the reply. This field is used for Send Email and Send Fax templates only.
Template Type		<p>Required. Possible values are Greeting, Body, and Closing. Agents use these templates to tailor each area of a reply to a customer.</p> <p>Greeting or Closing. Used only for Siebel Email Response. You may want formal and casual greeting and closing templates. Other situations might call for a more detailed greeting or closing. Greeting and closing templates should be generic across the application and should not be associated with a category.</p> <p>Body. Used for Send Email, Fax, Wireless Message, and Page templates. It is not needed for Siebel Email Response templates unless you want to make the templates available for Send Email, Fax, Wireless Message, and Page.</p> <p>Only templates intended to be used as body templates should be associated to a category.</p>

Table 5. Template Field Default Values and Descriptions

Field Name	Default Value	Description
Recipient Group		<p>Required. Selecting a group determines the values that appear in the Available Substitutions list.</p> <p>The Recipient Group drop-down list contains all business objects that have a primary business component. In many cases, this will map to specific customer screens. After choosing a recipient group, the available substitutions for the selected group appear in the Available Substitutions selection box.</p> <p>In any greeting or closing templates that are set up as defaults in the Outbound Communications view in the User Preferences screen, only field substitutions from the Action recipient group will appear correctly. For more information about setting user preferences, see <i>Applications Administration Guide</i>.</p>
Public checkbox		Optional. Not used by Siebel Email Response.
Available Substitutions		Optional. Substitutions are variable fields that take the place of actual information that will vary from one email to another. Values come from the business components and are added using Siebel Tools. For example, the available substitutions for the Action business component appear when you choose the Activity Contact recipient group.
Template Text		<p>Required. Template Text can be free-form text with or without substitution fields. Type the text for the template type you choose, copying and pasting available substitution fields where you want the value to appear.</p> <p>For example, when the casual greeting template is:</p> <p style="padding-left: 40px;">Dear [First Name],</p> <p>The email reply shows:</p> <p style="padding-left: 40px;">Dear Bob,</p>

Creating a Catalog and Categories

If you are implementing Siebel Smart Answer, use the catalog and category setup instructions in the section about importing the knowledge base file in *Siebel Smart Answer Administration Guide*.

CAUTION: If you use the following procedure to create a catalog and categories before you implement Smart Answer, make sure these catalog and category names match the catalog and category names in the Smart Answer KB file.

Setting Up a Catalog for Siebel Email Response

You must set up a catalog for Siebel Email Response so that agents can use templates and solutions in replies to customers.

To create a catalog for the Email Response - Process Message workflow

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Catalog.
- 2 In the Catalogs list, click New.
- 3 In the Name field, type the catalog name you want to use.

NOTE: Catalog names must be unique.

The new catalog appears in the Catalogs list.

After creating the catalog, you must next set up categories for Siebel Email Response.

Setting Up Categories for Siebel Email Response

To set up categories for Siebel Email Response, perform the following tasks in the order in which they are presented:

- [Create Categories in a Catalog](#)
- [Associating Templates with a Category](#)
- [Associating a Solution with a Category](#)

Create Categories in a Catalog

When setting up categories, the first task to perform is creating categories in a catalog.

To create a category in a catalog

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Catalog.
- 2 In the Catalogs list, click the catalog name.
- 3 In the Categories list, click New.

See the table at the end of this procedure for descriptions of category fields.

- 4 In the Name field, type the name of a category you assigned to your templates and solutions during the planning process.

- In the Display Name field, type the category name as you want it to appear to the agents.

Field Name	Default Value	Description
Name		Required. Name of the category. Choose a name that clearly describes what templates will be associated with the category.
Display Name		Required.
Description		Optional.
Effective Start Date/ Effective End Date		The value of this field determines whether the category will be used.

Associating Templates with a Category

The next task you must perform is associating a template with a category.

NOTE: A template can be associated with more than one category.

To associate a template with a category

- From the application-level menu, choose Navigate > Site Map > Administration - Catalog > Catalog Administration.
- In the Catalogs list, drill down on the Name field.
- Select the category with which you want to associate a template.
- In the Categories form, click the drop-down arrow to find the Response Template view.
- In the Response Templates list, click New.
- In the Add Templates dialog box, use the scroll bar to find and select one or more templates you want to associate with the category.

NOTE: Use the templates you matched with categories in ["Performing a Business Analysis for Your Siebel Email Response Deployment"](#) on page 27.

- Click OK.

The Response Templates list shows the templates you selected to associate with the selected category.

NOTE: If you use Smart Answer, you can associate multiple templates with an auto-response email. The Order field in the Response Templates view tab allows you to specify the sequence in which templates appear in an auto-response email. After you select all the templates you wish to associate with a category, type a number that represents the sequence in which the template should appear.

Associating a Solution with a Category

The final task when setting up categories is associating a solution with a category.

To associate a solution with a category

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Catalog.
- 2 In the Catalogs list, select the catalog name and drill down on the Name field.
- 3 Select the category with which you want to associate a solution.
- 4 In the Categories form, click the drop-down arrow to find the Solutions view tab.
- 5 Click New.
- 6 In the Add Solutions dialog box, use the scroll bar to find and select one or more solutions you want to associate with the category. For more information, see [“Performing a Business Analysis for Your Siebel Email Response Deployment” on page 27](#).
- 7 Click OK.

The Solutions list shows the solutions you selected to associate with the selected category.

NOTE: If you use Smart Answer, you can associate multiple solutions with an auto-response email. The Sequence # field in the Solutions view tab allows you to specify the sequence in which solutions appear in an auto-response email. After you select all the solutions you wish to associate with a category, type a number that represents the sequence in which the solution should appear.

Repeat the three procedures in this section for each category you created during the planning process.

NOTE: To delete a record from the list of associated templates or solutions, select the record, and click Delete.

Creating an HTML Wrapper Template

You can create a special template containing HTML features that serves as a wrapper around outbound email messages, even when HTML is not directly supported by Siebel communications features. A wrapper template can contain links to your Web site, marketing messages, and so on. Agents do not have to change the way in which they reply to incoming messages through Siebel Email Response. However, when an agent clicks Send, the email is embedded in your wrapper template and sent to the message recipient.

To create a wrapper template for use with Siebel Email Response replies, perform the following tasks in the order in which they are presented:

- [Using an HTML Editor to Create a Wrapper Template](#)
- [Creating a Communications Template](#)
- [Modifying the eMail Response - Client Send Email Workflow in the Business Process Designer](#)

Using an HTML Editor to Create a Wrapper Template

The first task you must perform is to use any HTML editor to create a wrapper template.

To create an HTML wrapper template

- Using any HTML editor, create an HTML template.
- Make sure that the template contains the substitution value [Email Body] where you want your email body to appear.

Creating a Communications Template

The next task to perform is creating a communications template.

NOTE: For additional information on creating your communications template, see “Creating Templates, Catalogs, and Categories” on page 51 and *Siebel Communications Server Administration Guide*.

To create a communications template

- 1 From the applications-level choose Navigate > Site Map > Administration - Communication > All Templates.
- 2 In the Templates list, select a template.
- 3 Click the Advanced view tab.
- 4 In the Templates form, click New and complete the following fields.

Template Type	Recipient Group
Body	Email Activity Receiver

- 5 Click the Template Items view tab.
- 6 In the Template Item form, check Substitute Values and Message Body.
- 7 Add the wrapper template and associated graphics files to template items in Administration - Communications > All Template > Template items. For information about adding template items, see *Siebel Communications Server Administration Guide*.

Modifying the eMail Response - Client Send Email Workflow in the Business Process Designer

After creating the HTML wrapper template and your communications template, you must modify the Email Response - Client Send Email workflow.

To modify the Client Send Email workflow

- 1 In the Siebel Tools Object Explorer, select the Workflow Processes object.
- 2 In the Workflow Processes list, perform a query for *eMail Response - Client Send Email*.
- 3 In the Workflow Processes list, select *eMail Response - Client Send Email* and click Revise.

- 4 In the Workflow Processes list, right-click *eMail Response - Client Send Email*, and choose Edit Workflow Process.
The Business Process Designer appears.
- 5 Right-click the Send Response business service and choose Show Input Arguments.
- 6 In the Input Arguments list, add the input arguments that appear in [Table 6](#).

Table 6. Client Send Email Workflow Input Arguments

Input Argument	Type	Other Columns
Comm Template Name List	Literal	Value: [Siebel template name that contains your HTML template (without the HTML file extension)]
Recipient Business Component	Literal	Value: Comm Outbound Email
Source Business Object	Literal	Value: Comm Outbound Email
Comm Profile Override	Business Component	Business Component Name: Comm Outbound Email Business Component Field: Email Sender Name
Source Id List	Process Property	Property Name: Object Id Property Data Type: String

- 7 In the History Toolbar, click Back to return to Siebel Tools.
- 8 In the Workflow Processes list, select *eMail Response - Client Send Email* and choose Validate.
- 9 In the Workflow Processes list, select *eMail Response - Client Send Email* and click Deploy.

Managing Template Visibility

You can control visibility to templates in many ways, including the following:

- Associate a template with a business component. The template will be visible only when you are in a view associated with that business component.
- Select the appropriate template type (Greeting, Body, and Closing). For example, when you choose Greeting as the template type, only the template names for that type appear for selection.
NOTE: Greeting and closing templates are used only in Siebel Email Response replies, not in Send Email (F9) or Send Fax (CTRL + F9) communications. For more information about template types, see ["To create a Simple template."](#)
- By assigning default values in the Outbound Communications view of user preferences. For more information, see ["Filtering Templates by Assigning User Preferences Default Values."](#)

- By using access groups to filter objects. For more information, see [“Using Access Groups to Filter Objects.”](#)
- In Siebel Smart Answer, body templates must be associated with a category in the current KB file or the template will not be visible to you.

Filtering Templates by Assigning User Preferences Default Values

You can filter templates by assigning user preferences in the following ways:

- **Template format (plain text or HTML).** Set your Default Message Format in the Outbound Communications view of User Preferences. If you set your default message format to Plain Text, HTML templates will not be visible to you. Therefore, each template should be created once as an HTML template and once as a plain text so that it will be available to all users.
- **Language and locale.** You can set your language and locale in the Outbound Communications view of User Preferences. If you do not set this user preference, the language and locale used during the installation of Siebel software will be the default. In a global deployment, some templates need to be created in specific languages and locales. Because you can see only templates that were created for your language and locale setting, each template you wish to use for another language and locale, should be created in that language and locale.

Using Access Groups to Filter Objects

Access groups allow you to restrict visibility to various objects. By adding an access group to catalogs and categories, you can filter these objects based on the user's access group, division, or organization. Using access groups, you can also filter catalogs and categories and their corresponding response templates and solutions.

To assign an access group to a catalog

- 1 From the application-level menu, choose **Navigate > Site Map > Administration - Catalog.**
- 2 In the Catalogs list, select and drill down on the Name field.
- 3 Click the Access Groups view tab and click **New.**
- 4 In the Add Access dialog box, select the groups that should have visibility to this catalog and click **OK.**

NOTE: You can create new access groups in the Access Group screen.

- 5 Click the Private Flag field.

To assign an access group to a category

- 1 From the application-level menu, choose **Navigate > Site Map > Administration - Catalog.**
- 2 In the Catalogs list, drill down on the Name field.
- 3 Select an existing category or create a record and complete the fields.
- 4 Click the Access Groups view tab, and then click **New.**

- 5 In the Access Group dialog box, select the groups that should have visibility to this category and click OK.

NOTE: You can create new access groups in the Access Group screen.

Starting Siebel Email Response Server Tasks

Depending on your business requirements for processing email, you need to start the following server components:

- If you are processing email in real-time mode, you *only* need to start Communications Inbound Receiver. For more information on real-time email processing, see ["Processing Email in Real-Time" on page 24](#). For information on how to enable real-time email processing, see ["Enabling Real-Time Email Processing."](#)
- If you are processing email in nonreal-time mode, you need to start both Communications Inbound Receiver and Communications Inbound Processor. For more information on nonreal-time email processing, see ["Processing Email in Nonreal-Time" on page 25](#). For information on how to enable nonreal-time email processing, see ["Enabling Nonreal-Time Email Processing" on page 63](#).

Enabling Real-Time Email Processing

Complete the following procedure to enable real-time email processing.

To enable real-time email processing

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Communications > All Response Groups.
- 2 In the Response Groups list, select the response group for which you want to enable real-time processing.
- 3 Click the Input Arguments tab.
- 4 Add the following input argument:

Name	Value
RealTime	True

NOTE: This is the default value for this input argument.

Enabling Nonreal-Time Email Processing

The following procedure describes how to enable nonreal-time email processing.

To enable nonreal-time email processing

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Communications > All Response Groups.
- 2 In the Response Groups list, select the response group for which you want to enable nonreal-time processing.
- 3 Click the Input Arguments tab.
- 4 Add the following input argument:

Name	Value
RealTime	False

One instance of the Communications Inbound Receiver and Communications Inbound Processor server components has multiple subtasks that run at the same time as the server component. The Communications Inbound Receiver and Communications Inbound Processor server component tasks and subtasks *must* be running before Siebel Email Response can process incoming email. Therefore, you must start all Communications Inbound Receiver and Communications Inbound Processor server component tasks and subtasks. For general information about server components, see the *Siebel Server Installation Guide* for your operating system. Before starting any component tasks, please note the following:

- If you try to start the same Communications Inbound Receiver or Communications Inbound Processor component task twice, it will be rejected the second time. However, the first instance will be running as usual. You can always increase the number of subtasks for each component task if you have a high volume of incoming emails.
- One component task can have multiple subtasks associated with it and the subtasks route the email. The component task acts like a controller to coordinate its subtasks.

NOTE: The preconfigured number of maximum threads is *five*. Also, be aware that *Maximum Tasks* should always be greater than *Max Threads*.

Changing Siebel Email Response Setup After Implementation

If you make changes to the Siebel Email Response setup after you implement Siebel Email Response, you must stop and restart the Communications Inbound Receiver and Communications Inbound Processor server component for your changes to take effect. For some changes, you must stop and restart the server components only if you want your changes to take effect immediately. For example:

- To have changes to a workflow process take effect, you can submit them without stopping the server components. For information on submitting profile changes, see ["Submitting Profile Changes" on page 45](#). For information on submitting requests, see ["Resubmitting a Request" on page 125](#).

Automatically Restarting Server Components

If Communications Inbound Receiver and Communications Inbound Processor crashes, a new process will be started automatically for these server components if the AutoRestart component parameter = TRUE. The new process looks through all the response groups defined in the database and picks those records in which Startup = Active and Siebel Server = [current Siebel Server name] (the Siebel Server field *cannot* be blank) and starts a Communications Inbound Receiver and Communications Inbound Processor component task for each one of them. Complete the following procedure to verify the Communications Inbound Receiver and Communications Inbound Processor restart automatically.

To verify Communications Inbound Receiver and Communications Inbound Processor auto-restart

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Server Management > Servers.
- 2 Click the Tasks view tab.
- 3 In the Tasks list, query for the components named Communications Inbound Receiver/ Communications Inbound Processor.
- 4 If the status field value is not Active, refresh the view by clicking another view tab and then clicking the Server view tab.

When the value in the Status field changes to Active, auto-restart is complete.

For more information about starting server components, see the *Siebel Server Installation Guide* for your operating system.

Automatically Restarting a Response Group

You can set up Siebel Email Response to have Communications Inbound Receiver automatically start a response group. For more information, see ["Automatically Starting a Response Group" on page 50](#).

Managing Subtask Failures at the Email Process Level

When a task fails, the following events occur:

- An email message is sent to the email address defined in the Administrator Email Address field of the response group.
- The administrator should check the log files that are attached to the email and identify possible causes of the server component task failure.
 - If it is a workflow step error, it can be fixed in the workflow.
 - If it is a profile error, the administrator verifies that the profile for the response group is valid.
- The administrator manually restarts the server component task.

Starting the Communications Inbound Receiver

Every time you start an instance of Communications Inbound Receiver the application starts *one* main task and *five* subtasks. The main task is assigned the first (lowest) task number (for example, 1318). The five subtasks are assigned the next numbers in sequence (for example, 1319, 1320, 1321, 1322, and 1323). The main task manages the subtasks and the message queue. The subtasks process inbound messages by pulling the inbound messages from the queue and passing them to the appropriate workflow.

Starting the Communications Inbound Processor

The Communications Inbound Processor has only *one* main task.

Scenario for Communications Inbound Receiver Events

This topic gives one example of how the Communications Inbound Receiver Events may be used. You may use Communications Inbound Receiver Events differently, depending on your business model.

Events are stored in a subfolder under bin/queued. The subfolder name is based on the response group name. The root directory, bin/queued, can be overridden using the Communications Inbound Receiver server parameter *EventQueueDirectory*.

Processing Typical Communications Inbound Receiver Events

The following process describes a typical Communications Inbound Receiver event.

- 1 The driver generates an event for Communications Inbound Receiver.
- 2 The Communications Inbound Receiver creates an .evt file that stores the driver event.
- 3 The Communications Inbound Receiver renames the .evt file to .xevt immediately before workflow execution.
- 4 The workflow executes without any errors and the .xevt file is deleted.

Managing Errors During Communications Inbound Receiver Email Processing

The following process describes a processing error during Communications Inbound Receiver email processing.

- 1 The driver generates an event for Communications Inbound Receiver.
- 2 The Communications Inbound Receiver creates an .evt file that stores the driver event.
- 3 The Communications Inbound Receiver renames the .evt file to .xevt immediately before workflow execution.
- 4 Workflow returns an error which causes the event to be renamed from .xevt to .error.
- 5 An email is sent to the administrator and an error is logged (*Error invoking method %1 on event %2. Event will be reprocessed within %3 sections.*)

- 6 Within five minutes, the event will be renamed from .error to .evt and requeued.

Managing Database Failures During Communications Inbound Receiver Processing

The following process describes what happens when a database goes down during Communications Inbound Receiver processing.

- 1 The driver generates an event for Communications Inbound Receiver.
- 2 The Communications Inbound Receiver creates an .evt file that stores the driver event.
- 3 The Communications Inbound Receiver renames the .evt file to .xevt immediately before workflow execution.
- 4 Workflow returns an error and Communications Inbound Receiver determines the database is down.
- 5 The Communications Inbound Receiver renames the .xevt file to .paused.
- 6 Within five minutes, the event will be renamed from .paused to .evt and requeued.

Managing Crash Errors During Communications Inbound Receiver Processing

The following process describes what happens when a crash error occurs during Communications Inbound Receiver processing.

- 1 The driver generates an event for Communications Inbound Receiver.
- 2 The Communications Inbound Receiver creates an .evt file that stores the driver event.
- 3 The Communications Inbound Receiver renames the .evt file to .xevt immediately before workflow execution.
- 4 A crash occurs during email processing.
- 5 When Communications Inbound Receiver restarts, the .xevt file is found and renamed to .retry.evt.
- 6 A warning message is logged (*Event %s may have caused crash, requeing event for one retry.*)
- 7 The event is requeued for processing.

Typical Processing of an event that previously caused a crash

The following process describes the typical processing of an event that previously caused a crash.

- 1 The Communications Inbound Receiver renames retry.evt to retry.xevt immediately before workflow execution.
- 2 The workflow executes without error and retry.xevt is deleted.

Second Crash Error

The following process describes what happens the second time an event causes a crash.

- 1 The Communications Inbound Receiver renames retry.evt to retry.xevt immediately before workflow execution.
- 2 A crash occurs during workflow execution.
- 3 When Communications Inbound Receiver restarts, the retry.xevt file is found and renamed to ".crash".
- 4 An error message is logged and an email is sent to the administrator (*Event %s may have caused crash, change .crash extension to .evt to requeue on restart.*)

NOTE: The event is not reprocessed because it is assumed to have caused the crash. To reprocess the event, you need to change the .crash extension to .evt.

Stopping Communications Inbound Receiver and Communications Inbound Processing

If necessary, you can shut down the Communications Inbound Receiver and Communication Inbound Processor server components. For information on shutting down Siebel Server components, see *Siebel System Administration Guide*.

Enabling a Secure Sockets Layer (SSL) Connection for SMTP and POP3 Drivers

Complete the following procedure to enable an SSL connection for SMTP and POP3 drivers.

To enable an SSL connection for SMTP and POP3 drivers

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Communications > Communications Drivers and Profiles.
- 2 In the Communications Drivers list, select Internet SMTP/POP3 Server.
- 3 Click the Driver Parameters tab and complete the following fields:

Field	Comments
Enable SSL for POP3	Enter a value of TRUE to enable SSL.
Enable SSL for SMTP	Enter a value of TRUE to enable SSL.
POP3 Server Port	Change POP3 port to 995. NOTE: Port 110 is used for non-SSL connections.
SMTP Account Name	Enter value for SMTP Account Name.
SMTP Account Password	Enter value for SMTP Account Password.
SMTP Backup Account Name	Specifies account name for backup SMTP interface requiring user authentication.

Field	Comments
SMTP Backup Account Password	Specifies account password for backup SMTP interface requiring user authentication.
SMTP Server Port	Port 25 is used for both SSL and non-SSL connections.

Authenticating a SMTP Server

This security method uses two new driver parameters:

- SMTP Account Name
- SMTP Account Password

If these two new parameters are specified, an attempt will be made to execute the AUTH LOGIN command at the start of the SMTP session. If the AUTH LOGIN command fails, the session will be terminated, a log file error message will be generated, and the message send will fail. The driver will not consider this to be a permanent fatal error, so the OutboundCommMgr existing retry logic will apply and another attempt will be made to send the message at a later date.

5

Setting Up Siebel Email Response Workflows

This chapter covers how to set up Siebel Email Response workflows. It includes the following topics:

- [“Processing Email With Workflow Manager”](#)
- [“Using Siebel Email Response Workflow Processes” on page 72](#)
- [“Determining Siebel Email Response Process Properties” on page 72](#)
- [“Modifying Frequently Used Siebel Email Response Process Properties” on page 73](#)
- [“Using Preconfigured Siebel Email Response Workflow Processes” on page 75](#)
- [“Using the eMail Response - Process Message Workflow” on page 76](#)
- [“Using the eMail Response - Process Service Request Workflow” on page 94](#)
- [“Invoking the eMail Response - Response Workflow” on page 103](#)
- [“Invoking the eMail Response - Client Send Mail Workflow” on page 104](#)

Processing Email With Workflow Manager

This section contains information on how Siebel Email Response works with Workflow Manager to process incoming email. It also describes two inbound email workflow processes included with Siebel Email Response, eMail Response - Process Message and eMail Response - Process Service Request. For information about how to use Siebel Business Process Designer, see *Siebel Business Process Designer Administration Guide*.

Siebel Email Response processes each inbound email message using Siebel Business Process Designer. Siebel Business Process Designer is also used for user interface operations. Understanding Siebel Business Process Designer and the way Siebel Email Response uses it is critical to a successful deployment. It is strongly recommended that you learn the basics of Siebel Business Process Designer before implementing Siebel Email Response.

Siebel Email Response includes a few preconfigured workflows that route email messages to the right agent at the right time. Preconfigured workflows must be activated before they can be used. For instructions, see [“Activating Workflow Processes” on page 38](#).

The following procedure describes how to see a list of the preconfigured Siebel Email Response workflows.

To see a list of preconfigured Siebel Email Response workflows

- 1** From the application-level menu, choose **Navigate > Site Map > Administration - Business Process > Workflow Processes**.

2 In the Workflow Processes list, perform a query for *eMail Response* with a status of *Completed*.

You can use Siebel Business Process Designer with Siebel Assignment Manager, Siebel Universal Queuing, or a third-party universal queuing application to further automate your email interactions. No matter which routing method you use, it sets the Owned By field in the Activity record, so that the agent can view the email on the agent's My Communications screen. You can find detailed instructions for these applications in the following guides:

- *Siebel Business Process Designer Administration Guide*
- *Siebel Assignment Manager Administration Guide*
- *Siebel Universal Queuing Administration Guide*

Using Siebel Email Response Workflow Processes

To use a workflow process, you specify the Workflow Process Manager business service and RunProcess method in your response group and the workflow process name in the ProcessName input argument of your response group.

The following terms appear frequently in the workflow processes used for Siebel Email Response:

- **New message.** A new email work item entering the Siebel Email Response workflow for the first time. The message will not have a thread ID.
- **Follow-up message.** An email work item that has a thread ID.
- **Decision point.** The place in a workflow process at which a work item branches to other steps depending on a set of conditions. It includes possible branches for that point in the business process. Each branch consists of one or more conditions that must be met for a work item to follow that branch. There can be one or more decision points in a workflow process definition.
- **Business service.** An activity within a workflow process. Business services are logically linked together to create a workflow process definition.
- **Subprocess.** A workflow process embedded in another workflow process as part of the workflow process definition.

Determining Siebel Email Response Process Properties

A process property is a place to store values that the workflow process retrieves from your database or obtains during or after a processing step. Process properties can be added (as input arguments) to a business service step in a workflow. When a business service process ends, the final value of a process property is available as an output argument. There are two types of process properties: configurable and nonconfigurable.

- Configurable process properties allow the administrator to control the behavior of email message processing. They are changed frequently during setup. An example is Enable Test Mode?

Process Property Name	Default Value	Description
Enable Test Mode?	FALSE	If the Enable Test Mode? process property is set to TRUE, the eMail Response - Process Message workflow loads a sample email message from a file, rather than a live email server, allowing the administrator to test the workflow using the Process Simulator. See <i>Siebel Business Process Designer Administration Guide</i> for more information about running the eMail Response - Process Message workflow in the Process Simulator.

CAUTION: Use test mode only when you run the workflow process in Process Simulator mode. It should never be used when you run the process during normal operations.

- Nonconfigurable process properties are used primarily to store variables and are rarely modified by application administrators. An example is the MsgBody process property.

Process Property Name	Default Value	Description
MsgBody	none	The body of the inbound email message is stored in this variable. There is no default value.

Modifying Frequently Used Siebel Email Response Process Properties

You can modify process properties using the following ways:

Siebel Business Process Designer process properties. If you modify process properties in the Process Properties tab, the changes apply to all instances of this workflow.

Communications Server response group input arguments. You can override process properties using response group input arguments. This change applies only to messages processed using that response group. For more information, see [Chapter 4, "Completing Basic Setup Tasks."](#)

In the eMail Response - Process Message workflow, process properties shown in [Table 7](#) can be changed during a typical Siebel Email Response deployment.

Table 7. Process Message - Frequently Used Process Properties

Name	Default Value	Description
AckTemplateName	Email Response - Auto Acknowledge	The name of the template used for an Auto-Acknowledgement message.
Catalog Name	KB	The name of the catalog that stores the solutions and templates you use to respond to inbound messages.
CommOutboundMgrName		The name of the Siebel Server that transmits the outbound message.
Commit Time Entitlement ID		The workflow calculates the appropriate commit time, based on an entitlement.
Enable Assignment Manager	FALSE	If TRUE, Assignment Manager is enabled for email routing.
Enable Test Mode	FALSE	If TRUE, Test Mode is enabled and the workflow can be used in the Process Simulator. The XMLTestFileName parameter must also be specified.
Enable Universal Queuing		If TRUE, UQ is enabled for email routing.
Enable Lookup Sender By Organization	FALSE	If TRUE, contact lookup can be restricted to a specific organization.
Enable Smart Answer	FALSE	If TRUE, Smart Answer is enabled for Auto-Response and Auto-Suggest capabilities.
XmlTestFileName		The file path and file name of the XML file used for Test Mode.
Disable Auto Acknowledgement	FALSE	This is actually a response group input argument. Change the value to TRUE to disable the sending of auto acknowledgement email.

In the eMail Response - Process Service Request workflow, process properties shown in [Table 8](#) can be changed during a typical Siebel Email Response deployment.

Table 8. Process Service Request - Frequently Used Process Properties

Name	Default Value	Description
SRHelpAckName	Email Response - SR Help	The template used to respond when the Help keyword is processed.
SRQueryAckName	Email Response - SR Query	The template used to respond when the Query keyword is processed.
SRStatusAckName	Email Response - SR Status	The template used to respond when the Status keyword is processed.
SRStatusErrorAckName	Email Response - SR Status Error	The template used to respond when the Status keyword is processed and an error is detected.
SRSsubmitAckName	Email Response - SR Submit	The template used to respond when the Submit keyword is processed.
SRUpdateAckName	Email Response - SR Update	The template used to respond when the Update keyword is processed.
SRUpdateErrorAckName	Email Response - SR Update Error	The template used to respond when the Update keyword is processed and an error is detected.

Using Preconfigured Siebel Email Response Workflow Processes

Siebel Systems provides the following two types of workflow processes with Siebel Email Response:

- **Message processing workflows.** Executed by the Communications Inbound Processor server component as each inbound message is received. The following are the primary message processing workflows:
 - [“Using the eMail Response - Process Message Workflow.”](#) Use this workflow primarily for unstructured email messages. Each inbound message is processed and ultimately an activity record is created.
 - [“Using the eMail Response - Process Service Request Workflow.”](#) Use this workflow for structured or Web-form email messages. The subject of each inbound message is searched for specific keywords such as update or status. The workflow uses this keyword to call the appropriate subprocess.
- **User interface workflows.** Executed each time an agent clicks specified buttons in Siebel Email Response. The following are the primary user interface workflows:
 - [“Invoking the eMail Response - Response Workflow.”](#) Invoked by clicking the Reply, Reply to All, and Forward buttons on the My, My Team’s, and All Communications screens.

- “Invoking the eMail Response - Client Send Mail Workflow.” Invoked from the Send button in Siebel Email Response.

Message processing and user interface workflows can call subprocesses to accomplish subtasks. You can use Siebel Business Process Designer to customize preconfigured workflows or design new ones.

CAUTION: If you use scripts to customize Siebel Email Response workflows, do not attach any scripts to the BusComp_WriteRecord event. This might result in the script being executed more than once because a single process may write to a record multiple times. For more information on scripting, see *Siebel Tools Online Help*.

This chapter provides an overview of each workflow process, describing the most frequently modified processes or steps in these processes. For information about Siebel Email Response business services, methods, and input arguments, see “[Siebel Email Response and Business Services](#)” on page 131.

Using the eMail Response - Process Message Workflow

Unstructured email messages should be processed using the eMail Response - Process Message workflow.

The following are the primary features in this workflow process:

- “Setting Up a Workflow Process to be Test Mode Enabled (Workflow Decision Point)”
- “Finding Junk Email (Workflow Subprocess)”
- “Parsing Message Workflow Steps”
- “Creating an Activity (Workflow Subprocess)”
 - Contact Lookup
 - Commit time calculation (entitlement verification)
- “Enabling Smart Answer (Workflow Decision Point)”
 - Identify Language
 - Analyze Message (message categorization)
 - Suggest a reply
 - Automatically respond with a reply
- “Sending an Acknowledgement (Workflow Subprocess)”
- “Routing Email or a Message (Workflow Subprocess)”

Figure 5 illustrates these features.

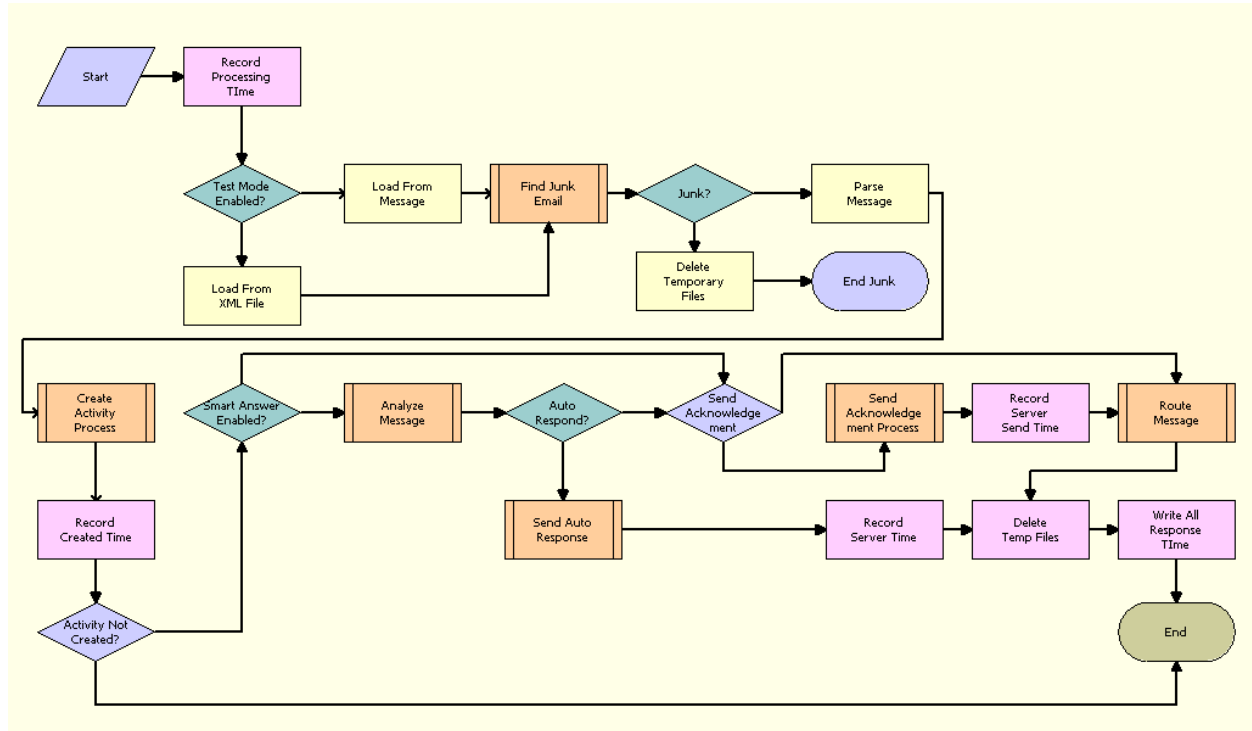


Figure 5. eMail Response - Process Message

To set up the eMail Response - Process Message workflow, use this chapter, [Chapter 4, "Completing Basic Setup Tasks,"](#) and *Siebel Business Process Designer Administration Guide*.

Setting Up a Workflow Process to be Test Mode Enabled (Workflow Decision Point)

After modifying a workflow, test the changes to make sure they are working properly. To use the Process Simulator, the administrator must set up the workflow process to run in Test Mode. To modify and test changes to the workflow process, use the Process Simulator. See Figure 6 for an illustration of this process.

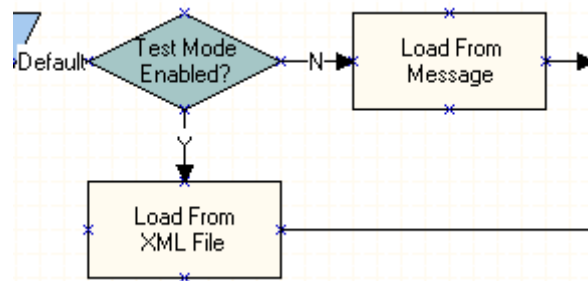


Figure 6. Enable Test Mode

In the production environment, Communications Inbound Processor executes the eMail Response - Process Message workflow. In test mode, process properties for the workflow are loaded from an XML file, not dynamically loaded by the Communications Inbound Processor server component. This allows the administrator to modify each parameter individually.

To run the Process Simulator, the administrator must perform the following tasks:

- Modify test XML files.
- Set up the workflow process.

To modify test XML files (Example)

- 1 Copy the test XML files from the sample database subdirectory (sample\applications\email_response).

NOTE: Test XML files are installed when you install the Sample Database.

- 2 Create a new directory on your Siebel Server. For example, c:\testmode.

NOTE: You do not need to use this exact location on your Siebel Server as long as you modify the XML file to reference the new directory. If the directory in which you copied the test mode files is not c:\testmode, you must modify the OrigMsgFile parameter in the XML file to match the directory you created for the files.

- 3 Copy the test files from the sample database subdirectory to your newly created directory.
- 4 Open the testmode.xml file in the text editor you use for these files.

NOTE: Files with the XML extension might be mapped to open in your web browser. If so, you should open the text editor and then open the file from the text editor.

- 5 Use [Table 9 on page 79](#) to modify the required parameters.
- 6 Save and close the XML file.

Table 9. Output Arguments and Descriptions

Output Argument	Example of a Value	Description
CcList	"replaceme@replaceme.com;test@test.com;casey_cheng@siebel.com"	Optional. A semicolon-delimited list of email addresses in the CC field of the message, enclosed in double quotation marks.
HasAttach	N	Do not modify.
Loopback_spcCandidate	N	Optional. Changes to Y if the message is identified as a loop-back candidate.
MsgClass	IPM.Note	Do not modify.
OrigMsgFile	c:\testmode\OriginalMessageText_3B88245D00000001.txt	Optional. A file path pointing to the original message file.
Prefix		Do not modify.
Received	08/25/01 15:20:40	Optional. The time the email server receives the message.
ReceiverAddress	replaceme@replaceme.com	Required. Email address of a working Communications Server Profile on your server.
ReceiverName	replaceme@replaceme.com	Required. Name of a working Communications Server Profile on your server.
SenderAddress	casey_cheng@siebel.com	Required. Email address of the sender of the message.
SenderAddrType		Optional. Type of sender address.
SenderName	Casey Cheng	Required. The text name of the message sender.
SenderReplyNames	The customer's name	The text name to whom the reply will be sent.
Sent	08/25/01 15:20:26	Optional. The time that the message was sent.
SiebelChannelProfile	replaceme@replaceme.com	Required. Same as the ReceiverAddress.
SiebelChannelType	Email	Do not modify.

Table 9. Output Arguments and Descriptions

Output Argument	Example of a Value	Description
SiebelChannelTypeString	POP3SMTP	Do not modify.
SiebelDriverEventName	MsgRead	Do not modify.
SiebelDriverNotifyWhen Done	0	Do not modify.
SiebelWorkItemID	10-3SYAC##998778040:1	Do not modify.
Subject	This is a test subject.	Optional. Text in the subject line of an email message.
TextNote	Fundamentally, computers just deal with numbers.	Optional. The plain text version of the email message body.
TextNoteCharset	us-ascii	Do not modify.
ToList	test2@test.com	Required. Email address to which the message was sent.

To set up the Enable Test Mode process

- 1** In Siebel Tools Object Explorer , select the Workflow Processes object.
 - 2** In the Workflow Processes list, perform a query for Process Name = *eMail Response Process Message*.
 - 3** In the Workflow Processes list, select *eMail Response Process Message* and then click Revise. The Status field changes to *In Progress*.
 - 4** In the Workflow Processes list, right-click *eMail Response Process Message* and choose Edit Workflow Process. The Business Designer appears.
 - 5** In the WF Process Props list, select XmlTestFileName.
 - 6** In the Default String field, enter the complete directory path and the file name of the test XML file.
- NOTE:** You must include the complete directory path to this file.
- 7** In the History Toolbar, click Back to return to Siebel Tools.
 - 8** In the Workflow Processes list, right-click *eMail Response Process Message* and choose Simulate Workflow Process.

The Process Simulator starts. For more information about the Process Simulator, see *Siebel Business Process Designer Administration Guide*.

Finding Junk Email (Workflow Subprocess)

Workflows can be configured to screen out many junk email messages. A junk email message is any message that you do not want to be routed to an agent for processing. Administrators can define keywords in workflow decision steps that detect junk email messages. When identified as junk email messages, the message is not stored in your database and workflow processing stops. Figure 7 illustrates this process.

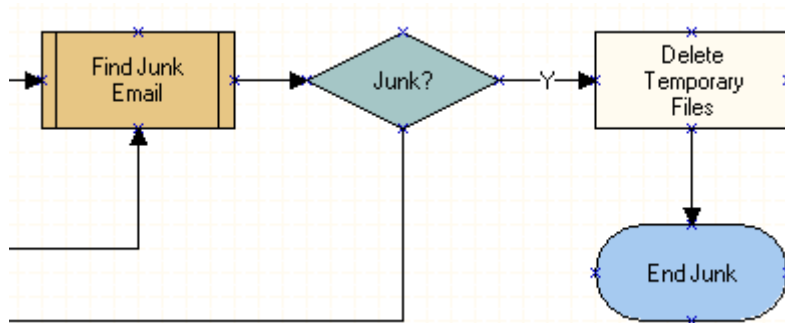


Figure 7. Find Junk Email

Looking for Junk Email

When looking for junk email, Siebel Email Response examines three areas in an email message: the sender field, subject field, and message body. If Siebel Email Response finds the keywords specified by the Siebel Email Response administrator, it flags the message as junk mail. Figure 8 illustrates this process.

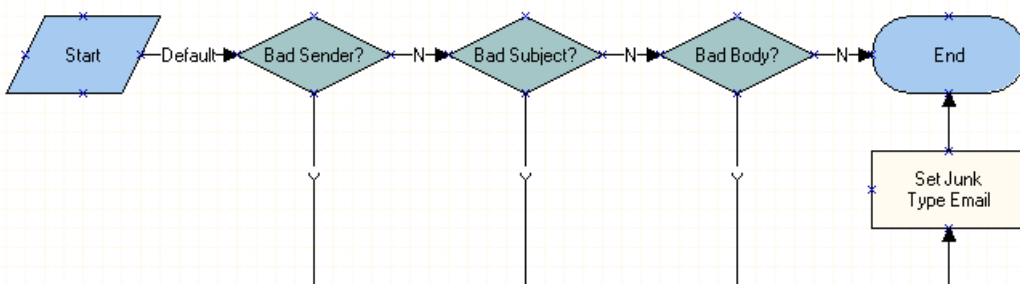


Figure 8. Find Junk Email Subprocess

Examples of keywords and keyword phrases that might be used to detect junk email messages include:

- Sender: postmaster@[your company's name].com
- Subject: out of office

- Body: [specified objectionable language]

NOTE: Only an experienced administrator should add keywords to the junk message processing workflow. Important messages might be lost unless each keyword is considered carefully.

Adding Keywords to Decision Points

Keywords can be added to decision points in the junk message processing workflow. The decision point you modify depends on the field you want to examine. You also can create decision points to examine other fields for keywords.

Decision points are the diamond-shaped steps in the Process Designer tab of the Administration - Business Process screen. Each decision point contains a Next Steps list, a Conditions list, and a Values list. For information about working with decision points, see *Siebel Business Process Designer Administration Guide*.

The Next Steps list includes Branch Name and Next Step fields.

- The Branch Name can be N (conditions are not met) or Y (conditions are met).
- The Next Step field specifies the workflow step where the message will be passed after branch conditions are examined.

In the Next Steps list, a branch can have one or more conditions in the Conditions list and each condition has a value in the Values list. For information about operators, expressions, and conditions, see *Using Siebel Tools*.

- If conditions for Branch Name Y are met, the work item will be passed to the workflow step in the Next Step field.
- If conditions for Branch Name N are not met, the work item will be passed to the Next Step field on the Branch Name N record.

Use the following procedure to set up the junk message processing workflow to detect messages sent from a particular email account.

To set up junk message processing

- 1** In Siebel Tools Object Explorer , select the Workflow Processes object.
- 2** In the Workflow Processes list, perform a query for Process Name = *eMail Response - Parse Junk Email*.
- 3** In the Workflow Processes list, select the *eMail Response - Parse Junk Email* and then click Revise.

The status of *eMail Response - Parse Junk Email* changes to *In Progress*.

NOTE: You do not have to change the workflow before you activate it. However, you must change the status to *In Progress*.

- 4** In the Workflow Processes list, right-click *eMail Response - Parse Junk Email* and choose Edit Workflow Process.

The Business Process Designer appears.

- 5 Right-click each decision step you want to modify (such as Bad Sender?) and add the new value to compare with Process Property.

For example, you can create a condition the following values:

Compare To	Operation	Property Name
Process Property	One Must Match (Ignore Case)	MsgSenderAddress

In this example, the MsgSenderAddress Property Name is compared to Process Property. To complete this condition, you need to type the address to which a message should be sent when it is identified as a junk email in the MsgSenderAddress field.

For example, postmaster@[your company's name].com.

- 6 In the History Toolbar, click Back to return to Siebel Tools.
- 7 In the Workflow Processes list, right-click *eMail Response - Parse Junk eMail* and choose Validate...

NOTE: For more information on testing a workflow process, see ["Setting Up a Workflow Process to be Test Mode Enabled \(Workflow Decision Point\)"](#) on page 78.

- 8 In the Workflow Processes list, click Deploy.

Parsing Message Workflow Steps

The following are two features used when Siebel Email Response processes email:

- **Threading.** Maintaining an association with related messages that are sent between a customer and an organization.
- **Parsing.** Analyzing an email message to look for predefined, structured fields that are typically used to process Web-form email messages.

The Parse Message step in the eMail Response - Process Message workflow provides both of these capabilities.

By default, this step parses an email message for the text [THREAD ID:. When that text is found, the workflow copies all the characters until it reaches the] character. These characters are stored in the Thread ID process property. The eMail Response - Process Message workflow uses the thread ID to perform the following tasks:

- On an agent's Communications views, the thread ID allows all messages with the same thread ID to appear in the History tab.
- Messages that have a thread ID are handled as follow-up messages. Automatic responses are never sent in response to follow-up messages.

NOTE: Misspelled words that appear after the [THREAD ID: tag do not get caught in the spell check.

The following are examples of message threading:

- Customer sends a new incoming email message.

From: customer@customer.com
To: support@siebel.com
Subject: Help

Please help.

- Customer

NOTE: There is no thread ID at the bottom of the response.

- Company sends response to customer.

From: support@siebel.com
To: customer@customer.com
Subject: RE: Help

Attached is the answer to your question.

- Support

[THREAD ID:1234]

NOTE: A thread ID appears at the bottom of the response.

- Customer replies to the response with a follow-up question.

From: customer@customer.com
To: support@siebel.com
Subject: RE: Help

I already tried that. Any other ideas?

- Customer

-----Original Message-----

From: support@siebel.com
To: customer@customer.com
Subject: RE: Help

Attached is the answer to your question.

- Support

[THREAD ID:1234]

NOTE: A thread ID appears at the bottom of the response.

In this example, each message is associated with the same thread ID (1234). The Parse Message step identifies messages as part of the same thread by looking for the text [THREAD ID:1234]. Each of these messages appear on the History tab on the Communications screen views.

Parsing for New Fields

In addition to the preconfigured capabilities of the Parse Message step, the step can be modified so that additional fields can be identified in an email message. Once these fields are extracted from a message, other steps in the workflow can be modified to use these values. One example would be to parse an email message for a campaign code. In email marketing campaigns, a code is often included in the bottom of the email message, so that marketing analysis can be performed. For a description of the Parse Text method and its input arguments, see ["ParseText" on page 135](#).

See the following example of an outgoing marketing message:

From: marketing@siebel.com
To: customer@customer.com
Subject: Important marketing message

Please visit our website www.siebel.com for more information on Siebel EmailResponse.

- Siebel Marketing

[CID:1234]

NOTE: A campaign ID appears at the bottom of the email.

See the following example of a response to the marketing message that might be sent by a customer:

From: customer@customer.com
To: marketing@siebel.com
Subject: RE: Important marketing message

Please have a sales representative contact me. Thanks.

- Customer

-----Original Message-----

From: marketing@siebel.com
To: customer@customer.com

Subject: Important marketing message

Please visit our web site www.siebel.com for more information on Siebel Email Response.

- Siebel Marketing

[CID:1234]

NOTE: The campaign ID still appears at the bottom of the customer's inquiry.

Parsing Message Text for the Campaign ID

Using information in *Siebel Business Process Designer Administration Guide* and the following list of tasks, you can modify the eMail Response - Process Message workflow to look for a CampaignID field in the message body or subject.

To parse text for the campaign ID

- 1 In Siebel Tools Object Explorer, select the Workflow Processes object.
- 2 In the Workflow Processes list, perform a query for *eMail Response - Process Message*.
- 3 In the Workflow Processes list, select *eMail Response - Process Message* and then click Revise.

NOTE: Confirm that you have clicked Revise for the workflow record that you want to modify. You can modify a record only if it has a status of *In Progress*.

- 4 In the Workflow Processes list, right-click *eMail Response - Process Message* and choose Edit Workflow Process.

The Business Process Designer appears.

- 5 Right-click the Parse Message step and choose Show Process Properties.
- 6 In the Workflow Process Props list, add a new record with Name = CampaignID.
- 7 Right-click the Parse Message step and choose Show Input Arguments.
- 8 In the Input Arguments list, add the CampaignID input argument with the following values:

Input Argument	Type	Value
CampaignID	Literal	[CID:%s]

- 9 Right-click the Parse Message step and choose Show Output Arguments.

- 10** In the Output Arguments list, add a CampaignID output argument with the following values:

Property Name	Type	Output Argument
CampaignID	Output Argument	CampaignID

NOTE: This output argument must match the input argument name you created in [Step 8](#).

- 11** IN the History Toolbar, click Back to return to Siebel Tools.
- 12** In the Workflow Processes list, right-click *eMail Response - Process Message* and choose Validate...

NOTE: You can also make sure the workflow works correctly by starting up the Communications Inbound Processor and sending test messages. For more information on validating workflow processes, see ["Setting Up a Workflow Process to be Test Mode Enabled \(Workflow Decision Point\)."](#)

- 13** In the Workflow Processes list, click Deploy.

You have modified the eMail Response - Process Message workflow to parse for an additional field in an email message. When the workflow receives a message with the specified field, the text will be copied into the new process property (CampaignID).

Using this same approach, you could modify the eMail Response - Create Activity Process workflow and associate the Activity record with the appropriate campaign.

Other potential uses of the Parse Message step include the following:

- Parsing an email message generated from a Web form. This step can look for first name, last name, and telephone number and use this data to create a contact record.
- The workflow can look for the text in the subject line instead of the message body. For example, if the CampaignID field is in the subject of the email message, you can modify the eMail Response - Process Message workflow to look for it.

Parsing Message Subjects for the Campaign ID

Using information in *Siebel Business Process Designer Administration Guide* and the following list of tasks, you can modify the eMail Response - Process Message workflow to look for a Campaign ID field in the subject line of email messages.

To parse message subject for the campaign ID

- 1** In Siebel Tools Object Explorer , select the Workflow Processes object.
- 2** In the Workflow Processes list, perform a query for *eMail Response - Process Message*.
- 3** In the Workflow Processes list, select *eMail Response - Process Message* and click Revise.
The status of *eMail Response - Process Message* changes to *In Progress*.

NOTE: This example uses the version of the workflow that has a status of *Completed*.

- 4 In the Workflow Processes list, right-click on *eMail Response - Process Message* and choose Edit Workflow Process.

The Business Designer appears.

- 5 In the Workflow Process Props list, add a new record with Name = *CampaignID*.

- 6 Navigate to the Process Designer view and add a new business service step.

For information on adding business service steps, see *Siebel Business Process Designer Administration Guide*.

- 7 Right-click the new business service step and complete the following fields:

Name	Business Service	Method
Parse Subject for Campaign	Inbound Email Manager	Parse Text

- 8 Right-click the Parse Subject for Campaign business service step and choose Show Input Arguments.

- 9 In the Input Arguments list, add a Text input argument with the following values:

Input Argument	Type	Property Name	Property Data Type
Text	Process Property	MsgSubject	String

- 10 In the Input Arguments list, add a CampaignID input argument with the following values:

Input Argument	Type	Value	Property Name	Property Data Type
CampaignID	Literal	[CID:%s]	MsgSubject	String

- 11 Right-click the Parse Subject for Campaign business step and choose Show Output Arguments.

- 12 In the Output Argument list, add a new output argument with the following values:

Property Name	Type	Output Argument
CampaignID	Output Argument	CampaignID

NOTE: The value you create for the Output Argument must match the input argument you created in [Step 10](#).

- 13 Use the Connector tool to connect the new step (Parse Subject for Campaign) you created in [Step 7](#) to the *eMail Response - Process Message* workflow.

- 14 In the History Toolbar, click Back to return to Siebel Tools.

- 15 In the Workflow Processes list, right-click *eMail Response - Process Message* and choose Validate...

16 In the Workflow Processes list, select *eMail Response - Process Message* and click Deploy.

Creating an Activity (Workflow Subprocess)

The primary purpose of the eMail Response - Process Message workflow is to convert inbound email messages into activity records. These activity records are reviewed by agents using the Communications screen. The Create Activity step invokes a subprocess workflow, eMail Response - Create Activity, and passes in a number of variables, which create the activity record and perform a number of other steps. See Figure 9 for an illustration of this process.

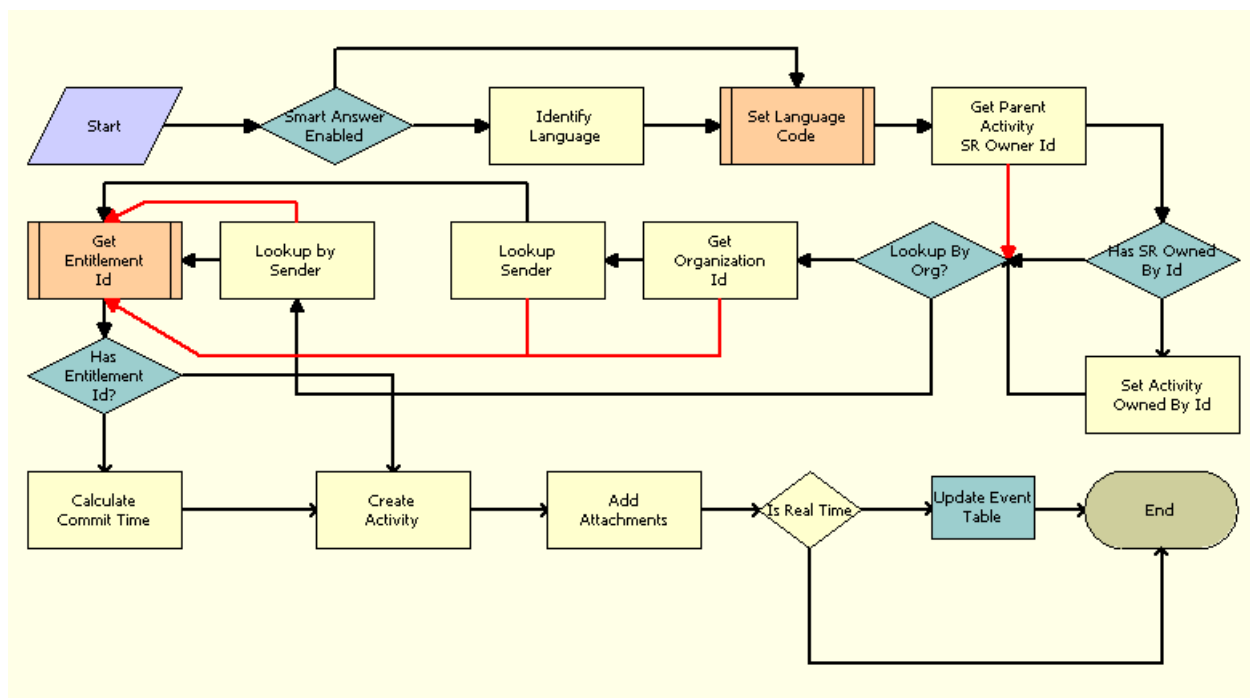


Figure 9. Create Activity Process

In addition to creating an activity record, the Create Activity subprocess performs the following processes:

- **Follow-up messages.** If the original message was associated with an SR, this process returns the Service Request ID and Service Request Owner ID values so that follow-up messages will be associated with the SR.
- **Contact lookup.** The workflow searches contacts in your database to find one with a matching email address. If you set up multiple organizations, the contact lookup can be restricted to a specific organization.
- **Language identification.** Performing a language detection routine on the message, identifying the language of the inbound email message, which is later used to route the message to an agent with the appropriate language skills.

- **Commit time calculation (entitlement verification).** The workflow calculates the appropriate commit time, based on an entitlement.
- **Activity attachments.** The workflow stores the original message and attachments as activity attachments in your database.

For more information, see [Chapter 4, "Completing Basic Setup Tasks."](#)

Enabling Smart Answer (Workflow Decision Point)

One of the key capabilities of Smart Answer is to automatically respond to inbound customer inquiries without human intervention and to automatically suggest answers to an agent who is manually responding to an email message. The eMail Response - Process Message workflow calls several subprocesses that analyze the message and ultimately send an auto-response message back to the customer. [Figure 10](#) illustrates this process. For more details about these capabilities, see *Siebel Smart Answer Administration Guide*.

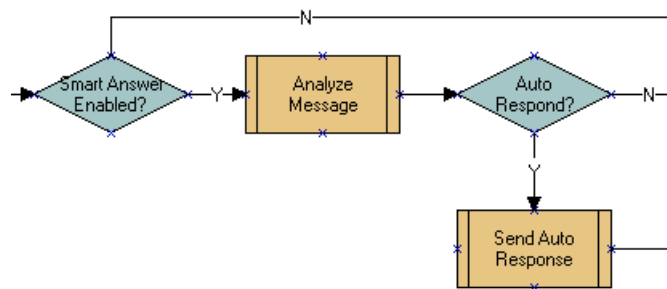


Figure 10. Smart Answer Enabled?

The eMail Response - Process Message workflow first determines if Smart Answer is enabled and if the administrator has enabled Smart Answer, then calls a subprocess, eMail Response - Analyze Message. The Analyze Message subprocess performs the following tasks:

- **Message categorization.** Analyzes the body of the email message using a series of natural language processing techniques to determine what the customer wants to know. The results of these routines are used to associate the message with one or more categories of potential solutions to the message. These categories are used in the eMail Response - Process Message workflow to automatically respond to the message or automatically suggest answers to an agent for approval.

- **Auto Respond? decision point (automatically respond to the email).** An auto-response message is sent when each of the following events occur:
 - The Analyze Message subprocess returns matching categories that exceed the accuracy levels established by the administrator.
 - The message is not a follow-up message.
 - The message is not a loopback candidate. Siebel Email Response identifies a loopback candidate by determining how many messages have been received from a particular email address in a given period of time. For more information, see information about driver parameters for the Internet SMTP/POP3 Server communications driver in *Siebel Communications Server Administration Guide*.

After an automatic response message is sent, an activity record is created for the auto-response message and the inbound activity record status is set to Auto Responded.

- **Automatically suggest a reply.** If auto-response criteria are not met, an auto-acknowledgement message is sent to the customer and the message and suggested answers are routed to an agent for approval.

Sending an Acknowledgement (Workflow Subprocess)

When messages are received, organizations want to acknowledge the customer’s message and tell the customer that they are working on the problem. Business Process Designer calls the Send Acknowledgement Process when an auto-response message cannot be sent. Some reasons are: Smart Answer is not enabled, an organization does not want to use auto-response, or the message is a follow-up.

The Send Acknowledgement Process calls the Email Response - Send Acknowledgement step. This step sends a customer an email notification stating that the customer’s message has been received. After the acknowledgement message has been sent, the inbound message is routed to an agent for further review. [Figure 11](#) illustrates this process.

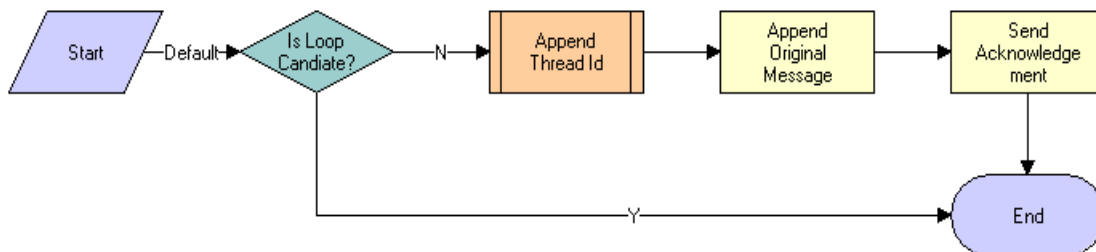


Figure 11. Send Acknowledgement Subprocess Steps

Routing Email or a Message (Workflow Subprocess)

Email messages usually are routed to agents by setting the Owned By field in the Activity record, allowing an agent to see the message in their Inbound Item List view. New email messages and follow-up email messages are routed differently. Follow-up messages from a customer contain a thread ID, new messages do not. The routing and queuing methods you use to identify the correct agent are other Xfactors that determine how messages are routed. Figure 12 illustrates this process.

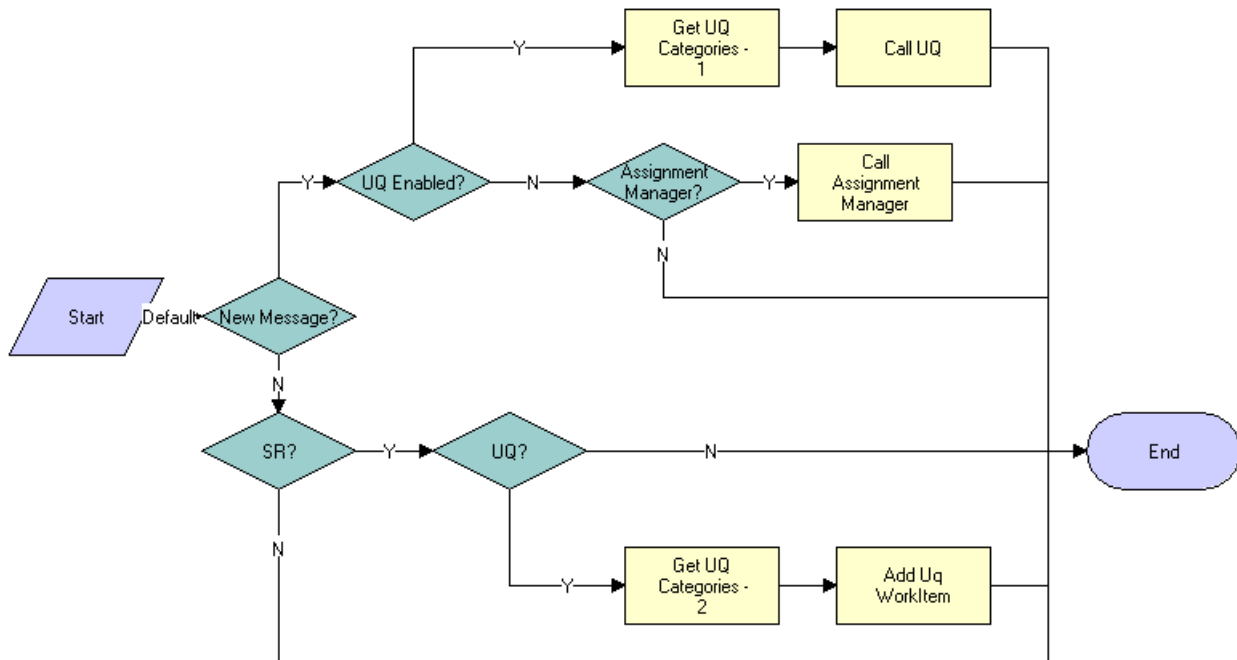


Figure 12. Route Email (Route Message) subprocess

- **New Message Routing.** New messages do not have Thread IDs. Therefore, new messages are identified by the absence of a thread ID in the message. When a new message is found, the workflow checks to see which routing process is employed (Siebel Universal Queuing, Assignment Manager, custom routing and queuing, or manual routing) on the following process properties:

Process Property	Default Value	Description
Enable UQ	FALSE	When TRUE, UQ should be configured to route email messages.
Enable Assignment Manager	FALSE	When TRUE, Assignment Manager should be configured to route email messages.

NOTE: Only one routing process property should be assigned a value of TRUE or the workflow might not work properly.

If both Enable UQ and Enable Assignment Manager process properties are set to FALSE, agents have to manually route each message.

- **Universal Queuing.** If the Enable UQ Process Property is TRUE, Siebel Universal Queuing routes the message to the appropriate agent or queue, based on the channel, routing, and escalation criteria you define.
 UQ routes new messages based on a prioritized list of the incoming email channels. For each email channel defined, there might be one or many corresponding routing and escalation rules that route the message based on a fully configurable range of criteria, including message category, message language, and employee skill.
- **Assignment Manager.** If the Enable Assignment Manager Process Property is TRUE, Siebel Assignment Manager assigns messages to the appropriate agent. Using assignment rules and criteria, Assignment Manager assigns specific activities to employees based on their skills, competencies, and other email assignment attributes. Assignment Manager can assign emails to employees dynamically, interactively, or by assigning a batch of emails to an agent.
- **Manual routing.** Each new message must be manually routed to an agent.
- **Follow-up message routing.** A follow-up message is an incoming email message containing a thread ID. By default, a follow-up message is routed to the agent who handled the original email message. For example, if Casey Cheng was routed the initial email message, the follow-up message will be routed to Casey Cheng if the thread ID is detected in the response from the customer. However, if the agent escalated the email message to a Service Request (SR) and assigned the SR to a different person, the message will be routed to the SR owner, not to the original email owner.
- **Universal Queuing.** If the administrator has set the Enable UQ process property to TRUE, follow-up messages can be routed using UQ, although in a different way from new messages. For follow-up messages, we know to whom the message should be routed (the person who handled the initial message or the SR owner) and UQ notifies the agent using the communications toolbar. For new messages, UQ uses key skills to determine the agent who should receive the email message, and then displays the message to that agent.

If the agent is not available then UQ can still find another agent who can handle the message.

- **Assignment Manager.** If the initial agent is not available then Assignment Manager can route the email to another agent capable of handling the message based on the defined assignment criteria.
- **Manual routing.** Each follow-up message must be manually routed to an agent.

Using the eMail Response - Process Service Request Workflow

Structured or Web-form messages, which must be submitted in *plain text*, can be processed using the eMail Response - Process Service Request workflow. The eMail Response - Process Service Request workflow attempts to identify a contact record that matches the sender's email address and processes the messages by identifying a keyword at the beginning of the subject line of the inbound email message. The other words in the subject line are ignored. Figure 13 illustrates this process.

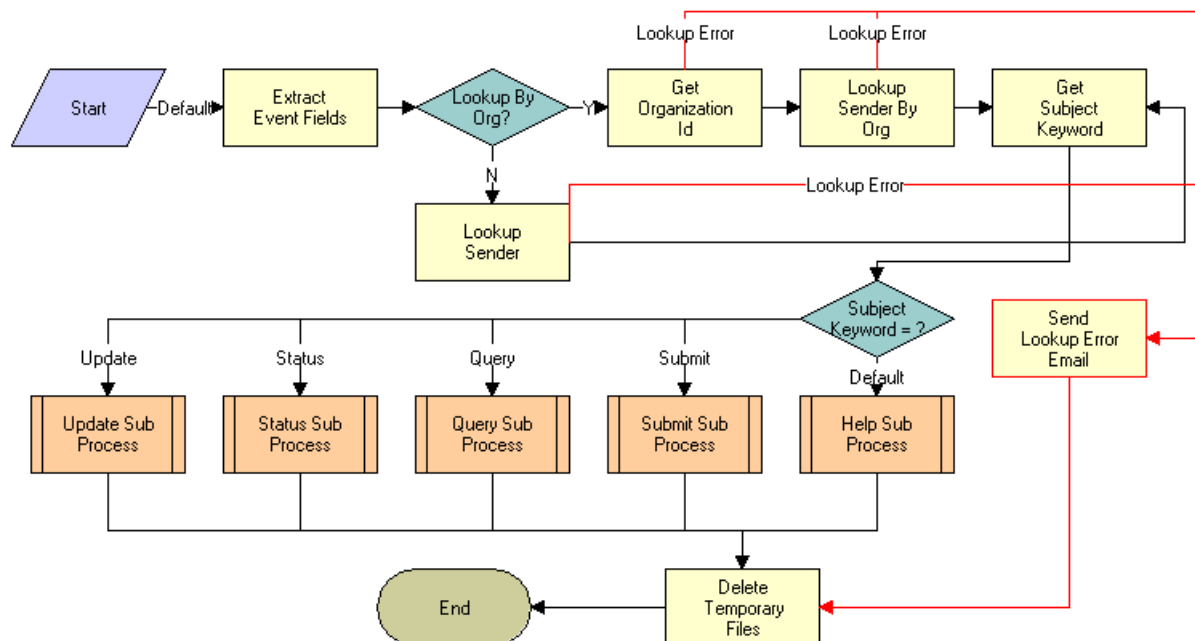


Figure 13. eMail Response - Process Service Request

This section describes how to take advantage of the following features of this workflow process:

- "Looking up Email By Organization (Workflow Decision Point)."
- "Getting a Subject Keyword (Workflow Step)."
- Service Request Workflow Subprocesses.

When a keyword is detected, eMail Response - Process Service Request workflow invokes one of the following workflow subprocesses:

- "Submitting a Subprocess (SR Submit Workflow)." Creates a service request record in your database.
- "Querying a Subprocess (SR Query Workflow)." Finds service request records in your database.
- "Updating a Subprocess (SR Update Workflow)." Adds an update to a service request record in the form of an Activity associated with the SR.
- "Determining the Status of a Subprocess (SR Status Workflow)." Requests the current status of the service request record.
- "Invoking a Help Subprocess (SR Help Workflow)." Sends instructions for the supported keywords.

To set up the eMail Response - Process Service Request workflow, use this chapter, [Chapter 4](#), "Completing Basic Setup Tasks," and *Siebel Business Process Designer Administration Guide*.

Looking up Email By Organization (Workflow Decision Point)

When an email message is received, the eMail Response - Process Service Request workflow attempts to identify a contact record that matches the sender's email address. This lookup capability operates in two different ways, depending on the value in the Lookup Sender By Organization process property.

By default, the workflow looks for a contact that matches the email address of the sender. If you change the Lookup Sender By Organization process property to Y, the following events occur:

- The workflow identifies the organization that is associated with the email profile (mailbox) in which the message is received. For more information, see [Chapter 4](#), "Completing Basic Setup Tasks."
- The workflow looks for a contact that is a member of that organization.

Figure 14 illustrates this process.

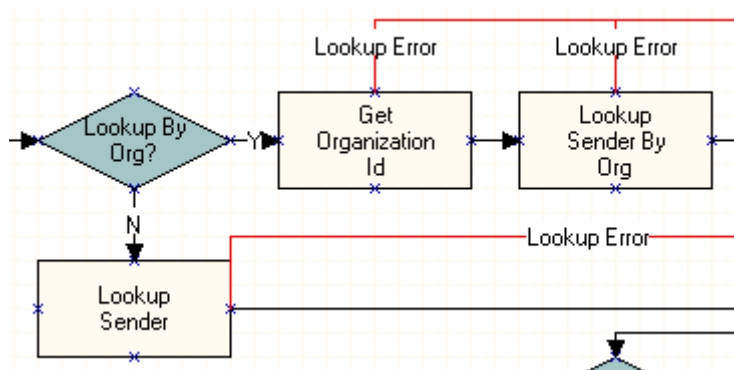


Figure 14. Lookup By Org?

Getting a Subject Keyword (Workflow Step)

The Get Subject Keyword step takes the text of the subject line and returns the first word in the subject line. The Subject Keyword = ? decision step uses this keyword to call the appropriate Process Service Request subprocess. See Figure 15 for an illustration of this process.

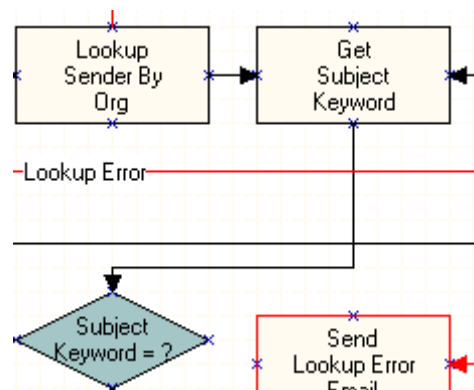


Figure 15. Get Subject Keyword

Submitting a Subprocess (SR Submit Workflow)

The eMail Response - Process Service Request workflow invokes the eMail Response - SR Submit workflow when the eMail Response - Process Service Request workflow detects the Submit keyword as the first word in the Subject line of an incoming email. See Figure 16 for an illustration of this process. This workflow parses the body of the email message looking for a set of structured fields which will be used to create the SR.

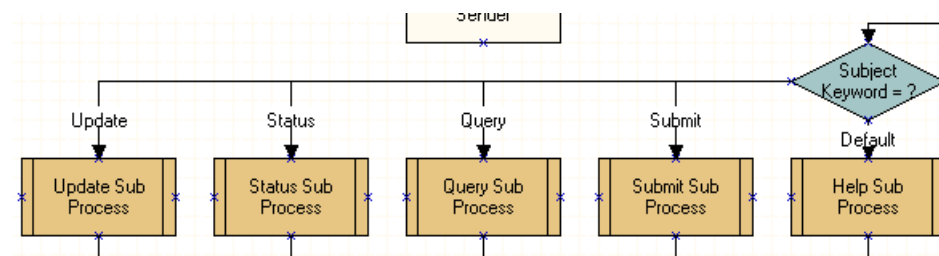


Figure 16. Process Service Request Subprocesses

The preconfigured workflow is designed to work with the Abstract, Area, Description, and Severity fields in the Mail Agent Service Request business component, but the workflow can be configured to work with other fields in that business component.

NOTE: The Mail Agent Service Request business component and the Service Request business component are based on the same table. Therefore, they share some fields.

For more information on extending the Mail Agent Service Request business component, see *Using Siebel Tools*.

Understanding the Submit Subprocess

After parsing the email message, the workflow looks for an entitlement record, using the Get Entitlement ID subprocess, and calculates a commit time for the SR. For more information, see ["Creating an Activity \(Workflow Subprocess\)."](#)

The workflow creates a new service record, adds attachments that were received with the incoming email message to the SR, and notifies the sender that an SR has been created.

See the following example of an incoming Web-form Submit message:

```
From: customer@customer.com
To: webform-processor@siebel.com
Subject: submit
```

```
[Severity]
1 - Critical
```

```
[Area]
Usage
```

The eMail Response - Process Service Request workflow generates a service request, stores it in your database, and sends a notification to the customer confirming that the message was received.

See the following example of a response that might be sent to a customer:

```
From: webform-processor@siebel.com
To: customer@customer.com
Subject:
```

```
Your email has been received.
```

```
Your reference number is 2-1CR. Please use the number for future reference.
```

Parsing for Fields in Incoming Email

The eMail Response - SR Submit workflow can be modified to process other keywords in the Service Request business component by making a few modifications to the eMail Response - SR Submit workflow.

Identify the additional fields that you would like to parse from incoming email and locate them in the Service Request business component. In the following example, you want to look for the Priority field. Verify that the field is available in the Mail Agent Service Request business component. If the field is not in the business component, see *Using Siebel Tools* for information about extending the Mail Agent Service Request business component. For additional information, see *Siebel Business Process Designer Administration Guide*.

To parse for other fields in email

- 1 In Siebel Tools Object Explorer, select the Workflow Processes object.
- 2 In the Workflow Processes list, perform a query for *eMail Response - SR Submit*.
- 3 In the Workflow Processes list, select *eMail Response - SR Submit* and click Revise.
NOTE: Make sure you click Revise before you attempt to modify a workflow process. You can modify a record only if it has a status of *In Progress*.
- 4 In the Workflow Processes list, right-click on *eMail Response - SR Submit* and choose Edit Workflow Process.

The Business Process Designer appears.

- 5 Right-click the Extract SR Fields step and choose Show Input Arguments.
- 6 In the Input Argument list, create a new input argument with the following values:

Input Argument	Type	Value
Priority	Literal	[Priority]%s[

- 7 Right-click the Extract SR Fields step and choose Show Output Arguments.
- 8 Create a new output argument with the following values:

Property Name	Type	Output Argument
Priority	Output Argument	Priority

- 9 Right-click the Create Service Request business service step and choose Show Input Arguments.
- 10 In the Input Arguments list add a new input argument with the following values:

Input Argument	Type	Property Name
Priority	Process Property	Priority

- 11 In the History Toolbar, click Back to return to Siebel Tools.
- 12 In the Workflow Processes list, right-click *eMail Response - SR Submit* and choose Validate...
- 13 In the Workflow Processes list, select *eMail Response - SR Submit* and click Deploy.

Querying a Subprocess (SR Query Workflow)

The eMail Response - Process Service Request workflow invokes the eMail Response - SR Query workflow when the eMail Response - Process Service Request workflow detects the Query keyword as the first word in the Subject line of an incoming email. See [Figure 16](#) for an illustration of this process. This preconfigured workflow parses the body of the email message for a set of structured fields that will be used to find a set of matching SRs.

See the following example of an incoming Web-form Query message:

```
From: customer@customer.com
To: webform-processor@siebel.com
Subject: Query
```

```
[Severity]
1 - Critical
```

```
[Area]
Usage
```

See the following example of a response that might be sent to a customer:

```
From: webform-processor@siebel.com
To: customer@customer.com
Subject: RE: Query
```

The following is a list of service requests that match your criteria. They are displayed in comma-delimited format.

```
2-1CR, 12:51 9/13/2001, Open, Assigned, Important issue
2-1CY, 12:51 9/15/2001, Closed, Closed, Very important issue
```

Understanding how the SR Query Workflow Processes a Request

The workflow process sends an email message to the customer with a list of matching SRs. This preconfigured workflow queries the Abstract, Area, Description, and Severity fields in the Mail Agent Service Request business component. Administrators can extend the workflow to query other fields.

The eMail Response - SR Query workflow can be modified to query using other fields in the Service Request business component by making a few modifications to the eMail Response - SR Query and eMail Response - Search Spec workflows.

NOTE: The Mail Agent Service Request business component and the Service Request business component are based on the same table. Therefore, they share some fields.

Adding Query Fields to the Search Spec Workflow

If you want to query using the Priority field, you should modify the eMail Response - Search Spec workflow. The following example describes the steps for modifying the eMail Response - Search Spec workflow. For additional information, see *Siebel Business Process Designer Administration Guide*.

To add query fields to the Search Spec workflow

- 1 In Siebel Tools Object Explorer, select the Workflow Processes object.
- 2 In the Workflow Processes list, perform a query for *eMail Response - Search Spec*.
- 3 In the Workflow Processes list, select *eMail Response - Search Spec* and click Revise.

NOTE: Make sure you click Revise before you attempt to modify a workflow process. You can modify a record only if it has a status of *In Progress*.

- 4 In the Workflow Processes list, right-click *eMail Response - Search Spec* and choose Edit Workflow Process.

The Business Process Designer appears.

- 5 In the WF Process Props list, create a new process property called Priority in which to store the new field.
- 6 Right-click the Extract SR Fields step and choose Show Input Arguments.
- 7 In the Input Arguments list, create a new input argument with the following values:

Input Argument	Type	Value
Priority	Literal	[Priority]%s[

- 8 Right-click the Extract SR Fields step and choose Show Output Arguments.
- 9 In the Output Arguments list, create a new output argument with the following values:

Property Name	Type	Output Argument
Priority	Output Argument	Priority

- 10 Right-click the Get Search Criteria step and choose Show Input Arguments.

11 In the Input Arguments list, create a new input argument with the following values:

Input Argument	Type	Property Name
Priority	Process Property	Priority

12 In the History Toolbar, click Back to return to Siebel Tools.

13 In the Workflow Processes list, right-click *eMail Response - Search Spec* and choose Validate...

14 In the Workflow Processes list, select *eMail Response - Search Spec* and click Deploy.

Updating a Subprocess (SR Update Workflow)

The eMail Response - Process Service Request workflow invokes the eMail Response - SR Update workflow when the eMail Response - Process Service Request workflow detects the Update keyword as the first word in the Subject line of an incoming email.

See the following example of an incoming Web-form Update message:

```
From: customer@customer.com
To: webform-processor@siebel.com
Subject: Update 2-1CR
```

Here is the update to my service request.

See the following example of a response that might be sent to a customer:

```
From: webform-processor@siebel.com
To: customer@customer.com
Subject: RE: Update
```

Your update has been submitted successfully.

This workflow parses the subject of the email message looking for an SR number. If workflow finds an SR number, the workflow process creates an activity record containing the contents of the email message and associates the record with the SR. If a customer sends an email to update the SR and the email contains an attachment, the attachment will be associated with the SR record.

Siebel Email Response sends an email message notifying the customer that the update has been received. If the workflow does not identify an SR, it sends an error message to the customer.

Determining the Status of a Subprocess (SR Status Workflow)

The eMail Response - Process Service Request workflow invokes the eMail Response - SR Status workflow when the eMail Response - Process Service Request workflow detects the Status keyword as the first word in the Subject line of an incoming email. See [Figure 16](#) for an illustration of this process.

See the following example of an incoming Web-form Status message:

```
From: customer@customer.com
To: webform-processor@siebel.com
Subject: Status 2-1CR
```

See the following example of a response that might be sent to a customer:

```
From: webform-processor@siebel.com
To: customer@customer.com
Subject: RE: Status
```

The current status for service request number 2-1CR is:

```
Status: Open
Sub-Status: Assigned
Area: Network
Severity: 1-Critical
Abstract: Important problem
```

This workflow parses the subject of the email message, looking for a service request number. The status of the SR identified in the subject line will then be sent to the customer in an email message. If a service request is not identified then an error message is sent to the customer.

Invoking a Help Subprocess (SR Help Workflow)

The eMail Response - Process Service Request workflow invokes the eMail Response - SR Help workflow when the eMail Response - Process Service Request workflow does not detect a matching keyword as the first word in the Subject line of an incoming email. See [Figure 16](#) for an illustration of this process. If the system does not find a contact in your database with a matching email address, the system sends an error notification to the sender, stating that a contact was not identified.

Invoking the eMail Response - Response Workflow

The eMail Response - Response Workflow is invoked by the Reply, Reply to All, and Forward buttons on the Communications screen. This workflow process creates the outbound email message and navigates the user to the view where agents can compose a response message. In addition to creating the activity the workflow also is responsible for appending the original message to the bottom of the email message.

Figure 17 illustrates this process.

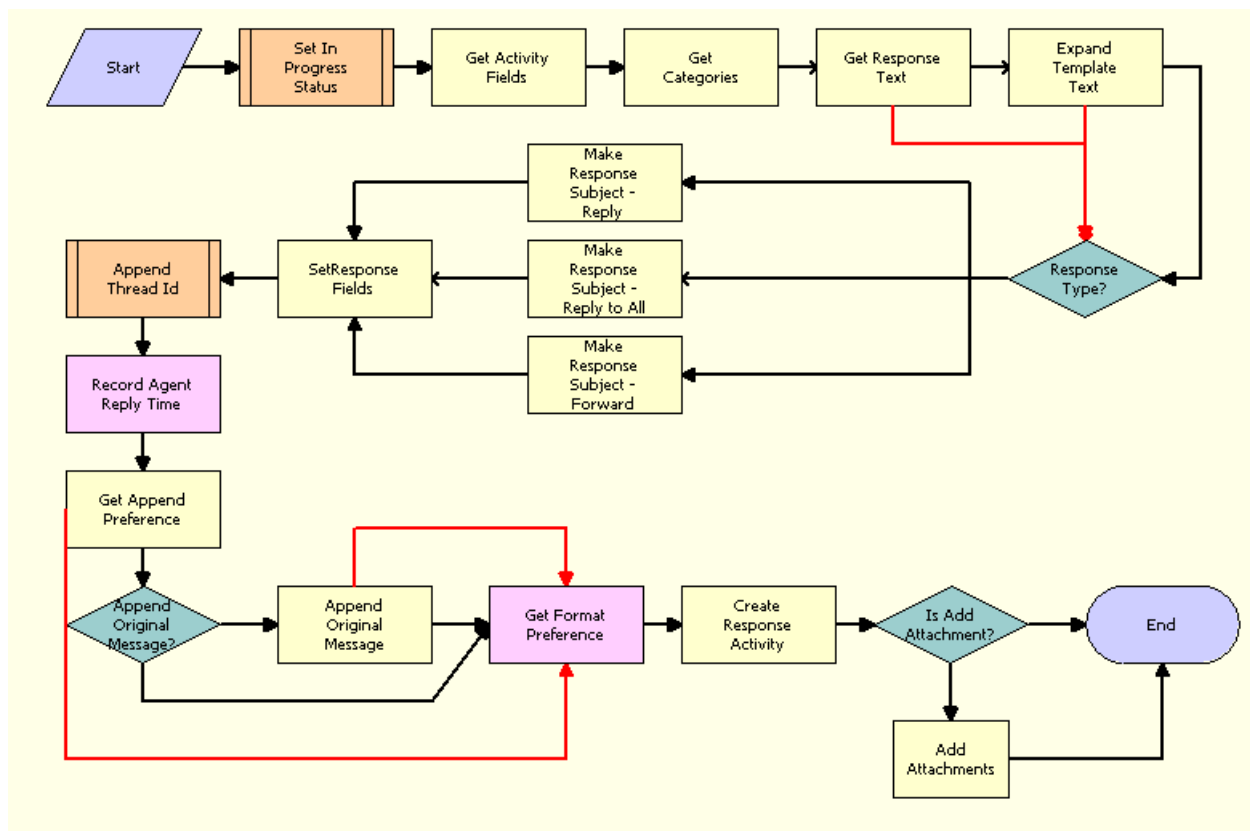


Figure 17. eMail Response - Response Workflow

Invoking the eMail Response - Client Send Mail Workflow

The eMail Response - Client Send Email workflow is invoked by the Send button on the Siebel Email Response Reply view. This workflow is responsible for performing message validation steps, updating the status of the inbound message to Done, and sending the email message. If you use the Smart Answer or UQ product, the workflow is responsible for providing feedback to the Smart Answer knowledge base, as well as releasing the UQ work item. Figure 18 illustrates this process.

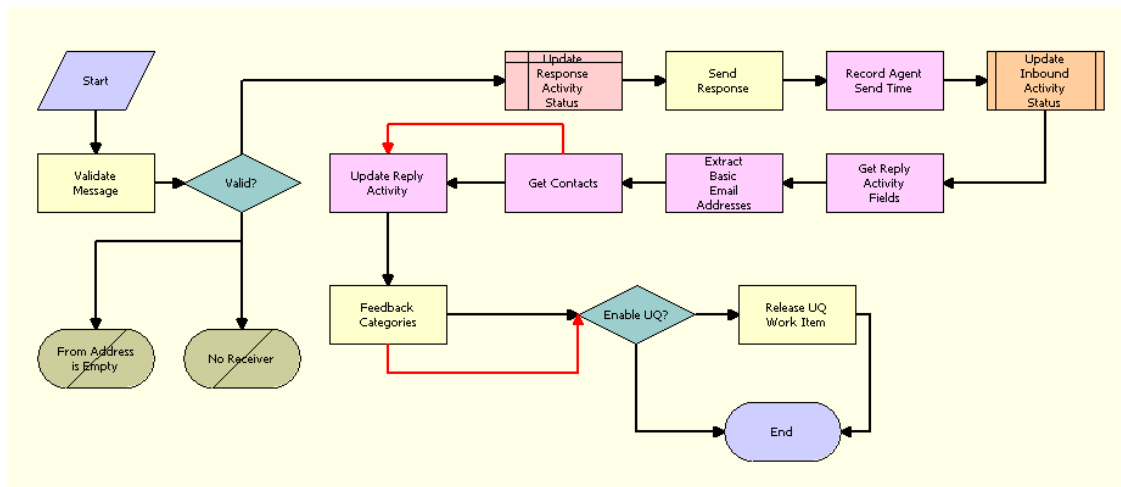


Figure 18. eMail Response - Client Send Email

6

Completing Advanced Setup Tasks

This chapter covers completing advanced setup tasks for Siebel Email Response. It includes the following topic:

- “Authenticating the Email Sender’s Email Address in Siebel Email Response”

NOTE: Many customers can deploy Siebel Email Response without advanced customizing. For customers with more complex needs, this chapter contains information that can be used to customize eMail Response - Process Service Request workflows. Before you use the advanced setup procedures in this chapter, follow all instructions in Chapter 3, “Planning a Siebel Email Response Deployment” and Chapter 4, “Completing Basic Setup Tasks.”

Authenticating the Email Sender’s Email Address in Siebel Email Response

The eMail Response - Process Service Request workflow process authenticates inbound email sender addresses during the Lookup Sender business service step.

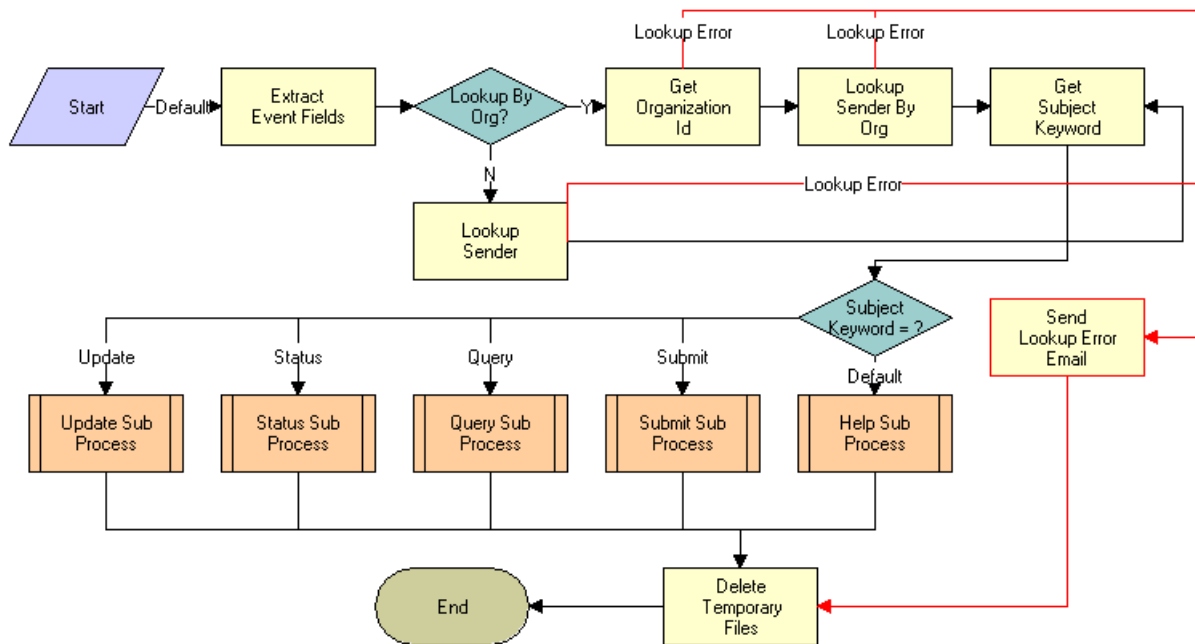


Figure 19. eMail Response - Process Service Request

Understanding the Lookup Sender Business Service

The high-level logic of this step is to use the inbound email sender's email address to search the list of contact records in the Siebel database for a matching email address. When the match is found, the step returns the row ID of the contact and the row ID of the contact's primary account and continues processing the request. These values are used in the following ways:

- When the Submit and Update workflow subprocesses are run, the row ID values are used to set values for the service request and activity records.
- When the Status subprocess is run, the row ID values are used to find the service request record.
- If no match is found, the workflow branches to an error condition and sends the inbound email sender a notification that authentication failed.

The Lookup Sender Business Service step uses the Inbound Email Siebel Operation business service FindRecord method to query a specific business object and business component within Siebel. The step uses developer-defined input arguments to specify the business object, business component, the field, the value to search the field with, and finally a field that is to provide the return value. The output argument of the step maps a process property from the workflow process to the value field returned by the query.

In the standard workflow process, the Lookup Sender Business Service step goes to the Mail Agent Contact business component in the Mail Agent Activity business object. In the Mail Agent Contact business component, it takes the value from the Email Address field and compares it to the MsgSenderAddress process property. When a matching contact record is found, it returns the Account ID field value and ID field value from that record. In some cases, users may need to modify the authentication logic so that the processing is based on a different business component, a different field, and so on. The following are two examples of how to accomplish this task.

CAUTION: Changes to one step in a workflow process may affect other steps later in the process. Therefore, be careful when customizing any workflow and test all customized workflow processes thoroughly before implementing them in a Production environment.

Authenticating a Sender's Email Address Using Employee Email Address

In this scenario returning the Account Id value would not be useful. Therefore, the user might want to change the Value Fields argument to Id. This would return the row Id of the employee who will have access. You might decide to use the value in the workflow to set the Owner Id field of the service request record.

Before changing any workflow, make sure you are familiar with procedures and guidelines in *Siebel Business Process Designer Administration Guide*.

Performing the following tasks is one way to customize the workflow to authenticate the inbound email sender's address:

- [Changing the Lookup Sender Step to Capture Employee Email Address](#)
- [Changing Related Workflows and Subprocesses](#)

Changing the Lookup Sender Step to Capture Employee Email Address

If a business requires that employees be authenticated using email, you can modify the Lookup Sender step input arguments by setting the Business Object field equal to Employee, the Business Component field equal to Employee, and the Query field equal to EMail Addr (the field in the Employee business component that stores the email address).

To change the Lookup Sender step to find the employee email address

- 1 In the Siebel Tools Object Explorer, select the Workflow Processes object.
- 2 In the Workflow Processes list, perform a query for Process Name = *eMail Response - Process Service Request*.
- 3 In the Workflow Processes list, select *eMail Response - Process Service Request* and click Revise.
The status of the *eMail Response - Process Service Request* workflow process changes to *In Progress*.
- 4 In the Workflow Processes list, right-click *eMail Response - Process Service Request* and choose Edit Workflow Process.
The Business Process Designer appears.
- 5 Right-click the Lookup Sender step and choose Show Input Arguments.
- 6 In the Input Argument list, make the following changes:

Input Argument	Type	Value
Business Object	Literal	Employee
Business Component	Literal	Employee
Email Address	Process Property	Email Addr
Query	Literal	Email Addr
Value	Literal	Id

- 7 Right-click the Lookup Sender step and choose Show Output Arguments.
- 8 In the Output Arguments list, delete Account Id.
NOTE: To recapture the Account Id, see ["Recapturing the Account Id" on page 110](#).
- 9 Right-click the Lookup Sender step and choose Show Process Properties.
- 10 In the WF Process Props list, create a new process property called Employee ID and change the value in the Data Type field to String.
- 11 Right-click the Lookup Sender step and choose Show Output Arguments.
- 12 In the Output Arguments list, modify the Contact Id output argument by changing the Property Name to Employee Id instead of Contact Id.
- 13 In the History Toolbar, click Back to return to Siebel Tools.

- 14** In the Workflow Processes list, right-click *eMail Response - Process Service Request* and choose Validate.
- 15** In the Workflow Processes list, right-click *eMail Response - Process Service Request* and click Deploy.

Changing Related Workflows and Subprocesses

Having changed the Lookup Sender step, you must also change other steps in the eMail Response - Process Service Request workflow and any of its subprocesses that use the Employee ID process property value. In this scenario, you need to make sure that you set the appropriate fields in the Service Request or Activity records so that they use the row ID of the employee record found by the Lookup Sender step.

For the outbound acknowledgement email, the preconfigured workflow uses an email template that assumes the contact ID is assigned to the service request record. In this example, we modified the Lookup Sender step of the workflow to assign the employee ID. To prevent the acknowledgement step in the eMail Response - SR Submit workflow process from failing, change the acknowledgement to use a template that uses the Service Request Owner recipient group or assign the contact ID to the Service Request record.

The following procedure provides an example of how to set up an employee ID in a subprocess workflow.

To set up an employee ID in a subprocess workflow

- 1** Add a process property to *eMail Response - SR Submit* called Employee ID.
- 2** Add an input argument to the Submit Subprocess step of *eMail Response - Process Service Request*; call it Employee ID and set it to the process property Employee ID.
- 3** Add an input argument to the Create Service Request step in *eMail Response - SR Submit* and set the name to Field: Owned By ID and set the process property to Employee ID.

NOTE: In the preceding example, the employee who submitted the email becomes the owner of the new service request record.

Authenticating a Sender's Address Using an Alternate Email Address

Your business might want to store more than one email address per contact in the Siebel database. One way to accomplish this is to use the Alternate Email Address field in the Contact business component. This field has multiple values and the data is stored in the Address field of the Communication Address business component.

The following scenario describes how to change standard workflow processes so that they will check the Alternate Email Address field to authenticate the sender of inbound emails.

Using Siebel Tools to Create a New Business Object

Because the Alternate Email Address field in the Contact business component is a multivalue field, you can use Siebel Tools to determine the destination business component and the destination field that stores the data. To find the destination business component, check the multivalue link that is associated with the field. The destination field is defined as a field parameter. For this example, the Alternate Email Address field in the Contact business component uses the data in the Address field of the Communication Address business component. These values will be used to define the input arguments in the Lookup Sender step.

Before you can use the Communication Address business component in the workflow, you must define it as part of a business object in the repository. Because Communication Address is not defined as part of a business object in preconfigured workflows, you need to create a new business object in Siebel Tools. For more information about creating business objects, see *Using Siebel Tools*.

Open Siebel Tools and use the object explorer to select the Business Object object. Create a new business object and call it Communication Address. Add two business object components to the business object, Contact and Communication Address. Set the link parameter on the Communication Address business object component to Contact/Communication Address. Navigate back to the business object level and set the primary business component to Contact. Compile the changes into the .srf used by the Siebel Server. Typically it is the siebel.srf file located in the [SIEBSRVR]\objects directory on the Siebel Server machine.

Changing the Lookup Sender Step to Capture Alternate Email Address

After the SRF file has been recompiled and the Siebel Server restarted, perform the following steps to change the Lookup Sender step.

To change the Lookup Sender step to find the alternate email address

- 1 In the Siebel Tools Object Explorer, select the Workflow Processes object.
- 2 In the Workflow Processes list, perform a query for Process Name = *eMail Response - Process Service Request*.
- 3 In the Workflow Processes list, select *eMail Response - Process Service Request* and click Revise.
The status of the *eMail Response - Process Service Request* workflow process changes to *In Progress*.
- 4 In the Workflow Processes list, right-click *eMail Response - Process Service Request* and choose Edit Workflow Process.
The Business Designer appears.
- 5 Right-click the Lookup Sender step and choose Show Input Arguments.
- 6 In the Input Arguments list, make the following changes:

Input Argument	Type	Value
Business Object	Literal	Communication Address
Business Component	Literal	Communication Address

Input Argument	Type	Value
Email Address	Process Property	Address
Query	Literal	Address
Value	Literal	Person Id (the foreign key that stores the row Id of the contact)

- 7 Right-click the Lookup Sender step and choose Show Output Arguments.
- 8 In the Output Arguments list, make the following changes:
 - a Delete Account Id.

NOTE: To recapture the Account Id, see "Recapturing the Account Id" on page 110.
 - b Change the argument from Object Id to Person Id.

Recapturing the Account Id

NOTE: The following example is optional.

The scenarios in "Authenticating the Email Sender's Email Address in Siebel Email Response" contain a step that deletes the Account Id output argument. When you delete the Account Id output argument, *eMail Response - Process Service Request* no longer captures the account Id for the contact. You can use the Contact Id process property to obtain the Account Id value using the following example. For more details, see *Siebel Business Process Designer Administration Guide*.

- 1 Create a new business service step in the workflow process and call it Find Contact Account. Set the business service to Inbound Email Siebel Operation and the method to FindRecord.
- 2 Connect the Lookup Sender to the Find Contact Account step instead of the Get Subject Keyword step.
- 3 Connect the Find Contact Account step to the Get Subject Keyword step.
- 4 In the Find Contact Account step, create the following input arguments and assign the values shown:

Input Argument	Type	Value
Business Object	Literal	Contact
Business Component	Literal	Contact
Query Fields	Literal	Id
Value Fields	Literal	Account Id
Object ID	Process Property	Contact Id

- 5 Create an output argument called Account Id and set its value to Account Id.

7

Global Deployment Setup and Configuration

This chapter covers setting up and configuring Siebel Email Response for multilingual, Unicode database, or non-Unicode database deployments. It includes the following topics:

- [“Using the Siebel Email Response Smart Character Set”](#)
- [“Deploying Siebel Email Response Internationally” on page 112](#)
- [“Planning a Siebel Email Response Global Deployment” on page 114](#)
- [“Setting Up Siebel Email Response for International Deployment” on page 115](#)

NOTE: Siebel Email Response setup and configuration steps are the same for each deployment type. For more information, see *Global Deployment Guide*.

Using the Siebel Email Response Smart Character Set

Siebel Email Response uses the Smart Character Set feature to support global installations by receiving, displaying, and replying to all emails with no character corruption. This feature works with both double-byte and single-byte character sets (with and without HTML) and applies to the email message body, MIME attachments, and the Subject line of an email. Smart Character Set saves the incoming character set so that it can be used later when replying to the email sender. For example, if a customer sends an email in Japanese (ISO-2022-JP character set), this information will be saved and used when replying to the email.

By implementing Smart Character Set, all incoming messages from Microsoft Outlook and outgoing messages sent to Web-based email clients (such as Yahoo! and Hotmail) will display properly. For a list of supported email clients, see *Siebel System Requirements and Supported Platforms* on Siebel SupportWeb.

While it is still possible to set the character set on a driver, if no character set is specified the Smart Character Set feature will reply in the character set of the incoming email (for example, if no character set is specified, emails received in UTF-8 will be replied to in UTF-8). When an email activity is received, the character set is stored in the activity table and contact record so that it can be used in F9 Send Email.

Automatically Enabling Smart Character Set

The following activities automatically respond using the same character set as the inbound email:

- Auto Response
- Auto Acknowledgement

■ Server Request Reply

NOTE: A new field, MIME_CHAR_SET is defined in the S_EVT_MAIL table to store the incoming or outgoing character set.

Manually Enabling Smart Character Set

When you manually enable the Siebel Email Response Smart Character Set, you define the character set for all outbound email using the profile.

To enable Siebel Email Response Smart Character Set

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Communications > Communications Drivers and Profiles.
- 2 In the Communications Drivers list, select Internet SMTP/POP3 Server.
- 3 Click the Driver Parameters tab.
- 4 In the Charset parameter, enter a value.

For a list of supported character sets, see *Siebel System Requirements and Supported Platforms* on Siebel SupportWeb.

Using Smart Character Set With F9 Send Email

NOTE: F9 Send Email is sent in UTF-8 unless a character set is specified when the profile is set.

For F9 Send Email, Smart Character Set checks for a character set in the following order:

- 1 The driver parameter is checked to determine the correct character set.
- 2 If no driver parameter exists, then the email is sent in UTF-8.

Using Smart Character Set With Siebel Email Response

For Siebel Email Response, Smart Character Set checks for a character set in the following order:

- 1 The message header of the inbound email is used to determine the correct character set.
For example, Content - Type: text/plain; charset= iso-8859-1.
- 2 If no customer record exists, the driver parameter is checked to determine the correct character set.
- 3 If no driver parameter exists, then the email is sent in UTF-8.

Deploying Siebel Email Response Internationally

In an international deployment of Siebel Email Response, you need to set up an email account (profile) and response group for each language supported by your organization.

For example, if your organization plans to support French and German, then you would set up two profiles and response groups. You might name the French profile and response group `fra_support@siebel.com`, and the German profile and response group `deu_support@siebel.com`. Customers send messages to the address that processes their preferred language.

In a Unicode deployment, the database is Unicode and customers can send email messages in different languages such as Japanese, Chinese, English, German, and so on. However, unless you use Siebel Smart Answer and will process email messages only in the languages supported by Smart Answer, you still need to set up a profile for each language.

Siebel Smart Answer can automatically detect several supported languages. For a list of supported languages by Siebel Smart Answer, see the system requirements and supported platforms documentation for your Siebel application. For more information about deploying Siebel Smart Answer internationally, see *Siebel Smart Answer Administration Guide*.

In an international environment, Siebel Email Response performs the following tasks:

- Monitors response groups set up for each language that your organization supports.
- Creates an activity record in the Siebel database that stores the content of the email along with the language of the email message. The original email message is also stored as an attachment to the record.
- Sends an acknowledgement message using the original language of the message. For example, if a user sends a message in French, an acknowledgement message will be sent to the user in French.
- Routes an inbound email message to the agent that can best handle the message. The routing is based on assignment rules defined using Assignment Manager and Universal Queuing. For example, a French message will be routed to an agent that has French as a language skill. See *Siebel Assignment Manager Administration Guide* and *Siebel Universal Queuing Administration Guide*.
- Suggests responses or automatically responds to the messages in the sender's native language using Siebel Smart Answer.

See *Siebel Smart Answer Administration Guide* on *Siebel Bookshelf* and *Banter Workbench User's Guide* on *Siebel eBusiness Third-Party Bookshelf*.

- Allows an agent to compose and send messages using templates in a preferred language.

Agents review messages using a Siebel client and compose and send response messages using response templates. The list of available templates consists of all templates in all languages. Templates are filtered by the language and locale values that are set by the agent in the User Preferences screen. If these user preference fields are not specified, filtering is based on the language and locale of the object manager to which the agent is connected. For example, if the agent's browser is connected to the French object manager, then the templates are filtered based on French.

When Smart Answer is used, a list of suggested categories is displayed. Solutions and templates are associated with the suggested categories. The agent selects a category in the category list and then selects a solution or template associated with that category from the Body drop-down list. The association of solutions and templates with a category is an administrative function that you perform during Siebel Email Response setup.

NOTE: Templates and solutions should be translated into the supported languages that were selected by your organization during the deployment planning stage of your Siebel Email Response implementation.

- Checks spelling for the most common international languages. For more information, see [“Using the Spell Check Feature.”](#)

Planning a Siebel Email Response Global Deployment

Before deploying Siebel Email Response in an international environment, analyze your organization's requirements.

- Do any groups in your organization receive messages in languages other than English? If so, do they have an email address set up to receive international messages? How are international email messages handled currently?
- What code page does your Siebel Server support? How many languages does your organization plan to support?
- If your organization plans to support three languages (French, German, and Italian), you need to create one profile for each language. You also create one response group for each language, adding the appropriate profile to the response group. Each response group will support one language-specific profile. For example, to support French, the response group named `fra_support@siebel.com` supports the profile named `fra_support@siebel.com`.
- If you use Siebel Smart Answer, see the following requirements:
 - If you process email messages only in the languages supported by Smart Answer, you do not need to set up a separate profile and response group for each language.
 - However, if you want to process email messages that are not supported by Smart Answer, you must set up a separate profile and response group to process email in each of those languages.

- Which routing method will you use to route incoming email to agents? You can route activities using Assignment Manager or Universal Queuing based on the language of the message.
NOTE: The language field is not displayed in the Activities list. To see the language of the activity, you have to select the More Info tab, click the Show More button, and check the Language field.
- What communications templates have you decided to use in Siebel Email Response replies? If your organization is planning to support multiple languages and decides to add new templates, the template text will have to be translated to the languages that the customer plans to support.
See ["Creating Templates For International Deployments."](#)

Setting Up Siebel Email Response for International Deployment

Customers can deploy Siebel Email Response in a single environment using different languages if the languages are in the same code page. Agents that use templates for daily replies to inbound messages can filter templates based on the language and locale setting in user preferences.

Completing Prerequisite Setup Tasks for International Deployments

If your organization plans to support multiple languages, make sure to install the language packs for each of the languages supported. The language pack will install the templates used in Siebel Email Response in a specific language. For more information on language pack installation, see the *Siebel Installation Guide* for the operating system you are using.

If you plan to use Siebel Assignment Manager to assign activities based on language, you need to enable the Assignment Management Group. For additional information, see *Siebel Assignment Manager Administration Guide*.

For additional information about using Siebel Universal Queuing to assign activities based on language, see *Siebel Universal Queuing Administration Guide*.

Installing Language Packs and Communications Templates

When you install Database Language packs, the communications templates (containing the correct values for language and locale) associated with Siebel Email Response are installed. You can create additional templates to meet your business requirements, following best practices guidelines. See ["Creating Templates For International Deployments."](#)

Setting Up Email Accounts for Supported Languages

You will need to set up an email account for each language that you plan to support.

In your email server, create one response group per language. Each of these response groups will be used to handle messages in different languages. If your installation supports French and German messages, then set up two response groups (for example, `fra_support@yourcompany.com` and `deu_support@yourcompany.com`). For French messages, users have to send their messages to `fra_support@yourcompany.com`. For German messages, users will have to send their messages to `deu_support@yourcompany.com`.

Configuring Response Groups For International Deployments

To be able to reply to email messages in more than one language, you need to create a response group for each language and associate a profile with it. For example, if you plan to receive French messages, create a Response Group named "FRA Response Group" and associate the profile `fra_support@yourcompany.com` with the response group.

Each response group will monitor a particular language response group. You will need to create one response group per language. For example, the Communication Inbound Receiver for French will monitor the profiles associated with FRA Response Group.

For each response group, you need to pass the `MsgDefaultLanguageCode` input argument (contains the default language of the email message) to the following workflows:

- eMail Response - Process Message
- eMail Response - Process Service Request

`MsgDefaultLanguageCode` is an argument in the workflow process. It specifies the language that the workflow process uses to set the language of an activity record created. For example, when a user sends an email to `fra_support@yourcompany.com`, an activity record is created and the language of the activity is FRA. Based on the activity language, Assignment Manager and Universal Queuing can assign the activity to the agent that handles French emails. For a list of input parameters to configure response groups, see ["Adding Input Arguments to a Response Group" on page 47](#).

For more information on how to create profiles and response groups, see ["Setting Up Communications Server for Siebel Email Response"](#) and *Siebel Communications Server Administration Guide*.

Creating Templates For International Deployments

When creating templates in international deployments, follow the convention of naming the templates in English and include the language and locale. This will help maintain consistency. It is the naming convention used by Siebel Systems for translating the standard templates used by Siebel Email Response into the languages Siebel Systems supports. It is recommended that you follow the same naming convention.

Additionally, if you create templates, additional logic must be added to the workflow so that they can be invoked from the workflow process and so that Workflow will be able to detect the language of the template.

For instruction on how to create templates, see ["Creating Templates, Catalogs, and Categories"](#) and *Siebel Communications Server Administration Guide*.

Providing Language Support For International Deployments

The following should be considered in a Siebel Email Response international deployment:

- Email addresses containing non-ASCII characters are displayed and processed correctly by Siebel Email Response. However, when an outbound email contains non-ASCII characters in the email address, the non-ASCII characters are changed to Xs before the email is sent to the recipient.

NOTE: Generic Internet email addresses should *not* contain non-ASCII characters.

- One response group can handle only one language. If you support multiple languages, you need to set up a response group for each language.
- Siebel Email Response does not perform language detection. To detect languages, you must license Siebel Smart Answer. If you do not license Siebel Smart Answer, if an email message is sent to the wrong response group, the language of the activity record will be the default language that is specified in the input argument of the response group. For additional information about supported languages, see *Siebel System Requirements and Supported Platforms* on Siebel SupportWeb.
- Messages that are in languages that do not fall in the Windows code page 1252 or code page 8859-1 appear as undisplayable characters.

When you work with a monolingual or multilingual deployment or a non-Unicode database deployment, you might receive messages in languages that are not supported by the environment.

Because the Subject and Body cannot be converted, they appear as undisplayable characters. These emails are not processed by Siebel Email Response, no activities are created, and the email is sent as an attachment in email format to the administrator for review (if you set up the administrator email profile).

- Communications Inbound Receiver and Communications Inbound Processor allow the use of most widely-used character sets including 1252 / Latin-1, Shift-JIS, ISO-2022-JP (mail JIS), EUC-JP, and UTF-8.
- When Siebel Email Response replies to email messages, the prefix strings are in English and are not translated to the various languages supported.

For more information about supported languages, see *Siebel System Requirements and Supported Platforms* on Siebel SupportWeb.

8

Troubleshooting Siebel Email Response

This chapter covers how to diagnose and resolve many Siebel Email Response problems. It includes the following topics:

- ["Troubleshooting Siebel Email Response"](#)
- ["Using the Communications Inbound Events View" on page 124](#)
- ["Synchronizing Batch Components" on page 125](#)
- ["Using the Component Statistics and State Value Views" on page 125](#)

Troubleshooting Siebel Email Response

To resolve the problem, look for it in the list of Symptoms/Error messages in [Table 10](#)

Table 10. Resolving Siebel Email Response Problems

Symptom/Error Message	Diagnostic Steps/Cause	Solution
When I activate Siebel Email Response workflows in the Administration - Business Process screen, the following error appears: Cannot activate workflow process '<ProcessName>' version [<VersionNumber>]. Make sure it has 'In Progress' status.	Verify the status of the workflow process that you are trying to activate. Make sure the workflow process has the correct status. You cannot activate a workflow process unless it has a status of <i>In Progress</i> .	If the status of the workflow is not <i>Active</i> , see "Activating Workflow Processes" on page 38 .
The Communications Inbound Receiver and Communications Inbound Processor server tasks stop and nonreal-time email processing stops.		Use the Communications Inbound Events view to begin diagnosing nonreal-time processing errors. For more information, see "Resolving Nonreal-Time Processing Problems" on page 124 .

Table 10. Resolving Siebel Email Response Problems

Symptom/Error Message	Diagnostic Steps/Cause	Solution
Reprocessing emails in siebsrvr/bin/queued is not working automatically.	An email failed after not being processed correctly.	Resubmit the failed email. For information on how to perform this task, see "Resubmitting a Request" on page 125.
Unable to find definition for CommOutboundMgr component.	The Communications Outbound Manager server component is not synchronized correctly.	To resolve this error, synchronize the batch components on the Siebel Server. For more information, see "Synchronizing Batch Components" on page 125.
Communications Inbound Receiver error.		Use the Component Statistics and State Value view tabs to trace the last encountered error in Communications Inbound Receiver. For more information, see "Using the Component Statistics and State Value Views" on page 125.
I set up and started my response group. However, I do not see a reply to my inbound email.	<p>Possible causes for this problem could be:</p> <ul style="list-style-type: none"> ■ The POP3 parameters could be wrong. ■ The Communication Outbound Manager may not be operating. ■ The Communication Outbound Manager is running and operating but I still do not see any reply email. ■ The Communications Inbound Processor may not be running. 	For a list of possible solutions to this problem, see "Resolving Response Group Issues" on page 127.
I believe I set up everything correctly for Fax but I am not able to see the incoming fax when I use F9 Fax.	The fax server or fax machine could be incorrectly set up.	<p>Two possible solutions to this problem are:</p> <ul style="list-style-type: none"> ■ Try dialing the fax number to see whether it actually reaches the fax machine. ■ Send an email using a working email client with the exact syntax from Siebel Send Fax. Then, check to see if you receive the fax.

Table 10. Resolving Siebel Email Response Problems

Symptom/Error Message	Diagnostic Steps/Cause	Solution
<p>I created an outbound email or fax request but I did not receive the email or fax.</p>	<ul style="list-style-type: none"> ■ Communications Outbound Manager may not be running. ■ Communications Outbound Manager is running but there is error in sending emails. ■ Communications Outbound Manager is running but the email is sent to the wrong recipient. 	<p>The following list contains possible solutions to this problem.</p> <ul style="list-style-type: none"> ■ Check the outbound request to see if it has a Status = <i>Success</i>. ■ If the Status is not <i>Success</i>, check for errors in either the Request view or the log file. ■ If the log file indicates an error but did not provide enough information about the error, increase the event log level for Communications Outbound Manager.

Table 10. Resolving Siebel Email Response Problems

Symptom/Error Message	Diagnostic Steps/Cause	Solution
<p>I perform an F9 Send Mail from Microsoft Outlook on a contact. After I send the email, the activity still has a Status = <i>Queued</i>.</p>	<p>An activity has been created (otherwise you would not see the email). The question is whether the right contact is associated with the email.</p>	<p>A possible way to diagnose and solve this problem is:</p> <p>When you press F9 Send Mail and go into Microsoft Outlook before sending the email, you create an activity. You could go back to the contact where you pressed F9 Send Mail and drill down on the contact name and then click the Activity view tab. You should see a new activity. The status of the activity should be <i>Queued</i>. Once you send the email, the status of the activity should change to <i>Done</i>. If the activity status remains <i>Queued</i> and you do not see an error after clicking the Send button, you should close all Internet browsers and clean all downloaded objects.</p> <p>NOTE: To delete all objects from Internet Explorer, go to Tools > Internet Options > Setting > View Objects.</p> <p>Sometimes, you may need to go to C:\WINNT\Downloaded Program Files and physically remove all objects from there. After doing this, restart the application.</p>

Table 10. Resolving Siebel Email Response Problems

Symptom/Error Message	Diagnostic Steps/Cause	Solution
<p>I perform an F9 Send Mail on a contact from Microsoft Outlook. After I send the email, I do not see an activity being associated with the email.</p>	<p>The correct statement should be that previously created activity records were removed.</p>	<p>Two possible solutions to this problem are:</p> <ul style="list-style-type: none"> ■ An activity record will be created once you press F9 Send Mail and go into Microsoft Outlook. After finishing your email and possibly add or removing a contact, you click the Send button to send the email. Once you send the email, there is a script in the form that notifies the Siebel Server to update all email information including the contact list, the email subject and the email content. In a preconfigured application, the script will first remove all existing contacts from the activity and then add any new contacts based on the new contact list from Microsoft Outlook. The contact information from Microsoft Outlook could be in the following format: <ul style="list-style-type: none"> ■ Firstname LastName ■ Firstname LastName<email@email.com> ■ someemail@someemail.com ■ On the server side, the server code will use (1) Firstname, Lastname, emailaddress as search criteria against the contact table. If there is a match (either single or multiple), the server code will also associate the first found contact it finds with the activity. Therefore, if you think there is no association to the contact of your choice, check your database to see if you have multiple entries of the same first name, last name or email address.

Using the Communications Inbound Events View

You can use the Communications Inbound Events view to perform the following troubleshooting activities:

- [Resolving Nonreal-Time Processing Problems](#)
- [Resubmitting a Request](#)

Resolving Nonreal-Time Processing Problems

The following procedure describes how to resolve some of the common nonreal-time email processing problems.

To resolve nonreal-time processing problems

- 1 From the application-level menu, choose **Navigate > Site Map > Administration - Communications Inbound Events**.
- 2 In the Communications Inbound Events list, examine the fields to help determine the source of the problem as described in [Table 11](#).

Table 11. Communications Inbound Events Fields

Field	Value	Possible Cause
SRM Request Id	Id	<ul style="list-style-type: none"> ■ If null, could be a problem in the Communications Inbound Receiver. ■ If not null, could be a problem in the Communications Inbound Processor.
Status	<ul style="list-style-type: none"> ■ Queued ■ CIP Processing ■ Error ■ CIP Fatal 	A value of <i>Queued</i> or <i>CIP Processing</i> means there is no problem with the email processing. A value of <i>Error</i> or <i>CIP Fatal</i> means the email was not processed.
Processing/Receiving Siebel Server	Siebel Server Name	If the Siebel Server Name is in the Receiving Siebel Server field, then the Communications Inbound Processor has received the event.
Activity ID	Id	If the Activity Id is not null, the error may be in one of the steps in the workflow after creating the activity.
Comments	Description	Use the DriverTrackID to find the location of the error in the log files.

Resubmitting a Request

You can resubmit a failed email by completing the following procedure.

To resubmit a failed email

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Communications > Communications Inbound Events.
- 2 From the Communications Inbound Events menu drop-down list, choose Submit Request.

Synchronizing Batch Components

The following procedure describes how to synchronize Siebel Server batch components.

To synchronize the Siebel Server batch components

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Server Configuration > Enterprises.
- 2 In the Enterprise Servers list, select the Siebel Server for which you want to synchronize batch components.
- 3 Click the Synchronize view tab.
- 4 Select the batch components you want to synchronize and then click Synchronize.

NOTE: You do not need to stop and restart the Siebel Server process.

Using the Component Statistics and State Value Views

You can use the Component Statistics and State Value views to perform the following activities:

- [Diagnosing Communications Inbound Receiver Errors](#)
- [Tracing the Last Encountered Error in Communications Inbound Receiver](#)

Diagnosing Communications Inbound Receiver Errors

The following procedure describes how to diagnose Communication Inbound Receiver Errors using the Component Statistics and State Value views.

To use the Component Statistics and State Value Views to diagnose Communications Inbound Receiver errors

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Server Management > Components.

- 2 In the Components list, perform a query for *Communications Inbound Receiver*.
- 3 Click the State Values tab.
All currently loaded Response Groups appear.
- 4 Click the Statistics view tab.
The number of response groups, profiles loaded, real time events processed, and processing times appear.

Tracing the Last Encountered Error in Communications Inbound Receiver

The following procedure describes how to trace the last error encountered in the Communications Inbound Receiver.

- 1 From the application-level menu, choose Navigate > Site Map > Administration - Server Management > Tasks.
- 2 In the Tasks list, perform a query for *Communications Inbound Receiver*.
- 3 Click the State Values view tab.
- 4 In the State Value list, select Last Real Time Error and check the Description field for information on the last encountered error in the Communications Inbound Receiver.

Investigating and Reporting Abnormal Behavior During Processing

Communications Inbound Receiver and Communications Inbound Processor will *not* stop if an incoming work item (such as an email or a phone call) causes abnormal behavior during processing. Instead, a log file entry will be created for the abnormal behavior. An example of abnormal behavior could be a missing *From* address in an email or a stopped UQ engine. The log files for Communications Inbound Receiver and Communications Inbound Processor are:

- Communications Inbound Receiver: Comminboundrcvr log file
- Communications Inbound Processor: Comminboundprocessor_XXXXX.log

Investigating Abnormal Behavior During Processing

To investigate any abnormal behavior during processing, go to the Components view in the Administration - Communication > Communication Inbound Events screen and make sure there are entries for each email that is being processed. After an email has been successfully processed the entry will be deleted. If the email was not successfully processed, make sure that the status and comments are correct. You should also check the URL to make sure you have the right name. If you want to resubmit a failed email for processing, see ["Resubmitting a Request" on page 125](#).

Reporting Abnormal Behavior During Processing

Before reporting any abnormal behavior during processing, make sure *comminboundrcvr* and *comminboundprocessor* are set to the proper debugging level and MIME message. You need to attach both of these files to the abnormal behavior when reporting the problem.

Resolving Response Group Issues

The following list describes possible solutions to the problem of not seeing a reply to an inbound email after setting up and starting a response group.

- Check the <server>/bin directory to see whether there is any POP3SMTP*.log.
- Check the log file with the closest timestamp to the time the error occurred and see whether there is an obvious error on the POP3 side.
 - Set up an POP3 email account in Microsoft Outlook using the same profile information and perform a test to see if you are using good information.
 - Check if the server can actually see your email server. Test which users on the mailing list are current by sending an email to the mailing list asking for a response.
 - Use an IP address instead of a hostname.
- Perform an F9 Send Mail from a contact and see if you could see the outbound email. If you see a complaint about the Communication Outbound Manager not being defined, perform a Batch Component Synchronization. For information on performing this procedure, see ["Synchronizing Batch Components" on page 125](#).
- From the application-level menu, choose Navigate > Site Map > Server Job > My Job to see if a Communications Outbound Manager request has been created. Examine the record to determine the status of the request. If Status = *Queued*, then the request has been created and is waiting for Communications Outbound Manager to pick it up. If Status = *Active*, then the Communications Outbound Manager is executing it. If the Status = *Error*, then you need to determine what type of error occurred.
- If you are using nonreal-time email processing, the processing of emails is done by the Communications Inbound Processor. Navigate to the Administration - Communication > Communication Inbound view and check the status of the email. Each inbound email processed in nonreal-time mode will have an entry if the processing has either not started or has resulted in an error.
- Choose Navigate > Site Map > Server Job > My Job and check if there is a Communications Outbound Manager server job that resulted in an error.
- If everything seems to correct, you need to determine if the email is actually reaching the email server. To do this, login to the POP3 email server and check the following:
 - telnet <emailserver> pop3
 - +OK Microsoft Exchange 2000 POP3 server version 6.0.4417.0 (smtld1380exch1.esexch1.siebel.com) ready.
 - user qatest99

NOTE: You will not see what you type.

- +OK
 - pass resource
 - +OK User successfully logged on.
 - stat
 - +OK 0 0
 - NOTE:** This indicates no pending emails. The first 0 is the number of messages. The second 0 is total size of all messages.
 - quit
- If there are emails in your POP3 email server but your Siebel application email POP3 driver is not picking them up, set the POP3 driver to LogDebug=True and resubmit the profile changes. After this parameter, a log file named pop3smptXXXXX.log will be generated. Check the log file to see if there are any errors.

A

Tables and Reference

This appendix includes tables referenced by multiple chapters, details about how email is processed through drivers, and an overview of the information you need when you upgrade from Release 6.x to Release 7.7 of Siebel Email Response. It includes the following topics:

- ["Solutions and Templates Decision Table"](#)
- ["Routing and Queuing Methods Comparison Table" on page 130](#)
- ["Siebel Email Response and Business Services" on page 131](#)
- ["How the Internet SMTP/POP3 Driver Processes Email Messages" on page 140](#)
- ["Processing Internally Generated Attachments in Siebel Email Response" on page 147](#)
- ["Upgrading to Siebel Email Response Release 7.7" on page 149](#)

Solutions and Templates Decision Table

Table 12 will help you determine when to use solution documents (called FAQs in Siebel eService), when to use reply templates, and how each compares to a free-form reply.

Table 12. Solutions and Templates Decision Table

Free-Form Reply	Template	Solution
Personalized.	Less personal than free-form.	Less personal than free-form.
Time-consuming.	Faster than free-form.	Faster than free-form.
More error-prone.	Content can be verified and preapproved by legal and other departments before using.	Content can be verified and preapproved by legal and other departments before using.
Does not use substitution fields.	Can select identified fields from an incoming email and insert them in predefined places in your template. Can include multilevel substitution fields using the Advanced Template form, such as links to service requests, orders, and opportunities.	Does not use substitution fields.

Table 12. Solutions and Templates Decision Table

Free-Form Reply	Template	Solution
A one-time effort that cannot be shared with other customers unless you recreate the email.	Can be sent to any customer by selecting the template within Siebel Email Response.	The same solutions files can be shared across channels. Updates only need to be done once and then all users have access to the most current information. An agent can insert the contents of a solutions file into the body of an email message (Siebel Email Response), use it to reply to a customer's request received during a telephone call (Siebel Call Center), and publish it on a service Web site (Siebel eService).
Can attach files.	Can attach a file to an email that contains a template. However, Siebel Email Response does not support adding attachments to templates.	Can attach a file to an email that contains a solution. However, Siebel Email Response does not support automatically adding attachments from solutions.

Routing and Queuing Methods Comparison Table

Table 13 lists the advantages and disadvantages of each routing and queuing method.

Table 13. Routing and Queuing Methods Comparison

Routing Method or Product	Advantages	Disadvantages
Manual routing	Very simple.	Very slow: Each email must be manually assigned to an agent. Requires a person dedicated to the routing process.
Custom Routing and Queuing	Meets precise business requirements. Can accommodate more complex business processes and hierarchies.	Takes time to design and program.

Table 13. Routing and Queuing Methods Comparison

Routing Method or Product	Advantages	Disadvantages
Siebel Assignment Manager	<ul style="list-style-type: none"> More powerful. Skills-based routing. Workload-based routing. Rules maintenance in graphical user interface. No programming required. 	No real-time notification using the communications toolbar. No blending of inbound communications across channels.
Siebel Universal Queuing	<ul style="list-style-type: none"> Most powerful. Skills-based routing. Keeps track of agent availability and workload sessions in real time. Maintenance performed in graphical user interface. Real-time notification using the communications toolbar. Access to communications channels (email, voice, Web collaboration, and so on) by using the communications toolbar. 	Must be purchased separately.

Siebel Email Response and Business Services

Siebel Email Response uses business services to interact with your database. A business service provides a new top-level object (such as a business object or applet) that can be used to implement reusable business logic and implement business rules capabilities. For more information about business services, see *Using Siebel Tools*.

Siebel Email Response uses many business services and their associated input arguments in its workflow processes. The two business services used by Siebel Email Response are:

- [Inbound Email Manager Business Service](#)
- [Inbound Email Database Operations Business Service](#)

Inbound Email Manager Business Service

Table 14 shows a list of methods and input arguments with descriptions for this Siebel Email Response business service.

Table 14. Inbound Email Manager Methods and Input Arguments

Method	Input Argument	Description
AddAttachments		Creates attachment records for the attachments in EventFields.
	Business Component	Business component in which attachment records are created.
	Business Object	Business object in which attachment records are created.
	EventFields	Hierarchy that contains file properties, such as FileName0, FilePath0, FileName1, FilePath1, and so on.
AddCategories		Associates categories with an activity record.
	ActivityID	ID of activity record with which categories are associated.
	BusComp	Business component in which category associations are created.
	BusObj	Business object in which category associations are created.
	Catalog	Catalog in which the system looks up categories.
	Categories	List of categories and corresponding scores.
DeleteTempFiles		Deletes temporary files specified in EventFields.
	EventFields	Hierarchy that contains file properties, such as FilePath0, FilePath1, and so on.
GetCategories		Gets the list of categories and scores associated with an activity.
	ActivityID	ID of activity record from which categories are obtained.
	BusComp	Business component of the associated categories.
	BusObj	Business object of the associated categories.
	Categories	List of categories and corresponding scores.

Table 14. Inbound Email Manager Methods and Input Arguments

Method	Input Argument	Description
GetEventCategories		Enumerates the categories in EventFields and returns them in a hierarchy.
	Categories	List of categories extracted from EventFields.
	EventFields	EventFields that contain category properties prefixed by CATEGORY.
GetPreference		Gets the value of a user preference.
	Category	Category of preference.
	Preference	Name of preference.
	Value	Value of preference.
GetResponseText		Gets the auto-suggest/response text for a set of categories based on their scores and thresholds.
	Catalog ID	The ID of the catalog in which your categories are stored. If the Catalog ID input argument contains a value, the Catalog ID is used to locate the catalog.
	Categories	List of categories and corresponding scores.
	CheckThreshold	If Y, checks category scores against the threshold to determine whether response text for a category is used. If N, gets the response text based on scores alone.
	Catalog Name	The name of the catalog in which your categories are stored. If the Catalog ID input argument contains a value, the Catalog Name input argument is ignored.
	MaximumSections	Maximum number of categories for which response text will be returned.
	ResponseText	Response text for the set of categories.
GetSearchSpec	[Name of a business component field, such as Area or Extract]	Creates a search specification based on the fields included as input arguments. For example, if Abstract and Area were input arguments, the search specification named [Area] = "Installation" AND [Abstract] = "Production" would be called the SRSearchSpec output argument.

Table 14. Inbound Email Manager Methods and Input Arguments

Method	Input Argument	Description
GetTokens		Gets a specified number of tokens from a string. The tokens are returned in output properties such as Token 1, Token 2, and so on.
	Delimiter	One or more characters that set off a token from surrounding characters. Default is the space character.
	NumTokens	The number of tokens to obtain. Default is 1.
	Text	The text from which the tokens are obtained.
GetUQCategories		Creates a WorkItemDataProperty hierarchy required by UQ. Every input property will be added to the output hierarchy.
	Categories	List of categories and corresponding scores. The category with the highest score is extracted and added to the WorkItemDataProperty hierarchy.
	WorkItemDataProperty	Hierarchy with the highest scored category and all input properties.

Table 14. Inbound Email Manager Methods and Input Arguments

Method	Input Argument	Description
ParseText		<p>Extracts response properties from the email. The input arguments of this method include a fixed argument called <code>Text</code>, which contains the text to parse and one additional argument for each response property to extract. The types of these additional arguments are <code>Literal</code> and the values indicate the patterns to match and are in the following format:</p> <p>expression = exp "Last(" exp ")"</p> <p>exp = {prefix}"%s" [{suffix}]</p> <p>The text "Last(" at the beginning and the text ")" at the end are optional. They indicate that the last occurrence of the pattern should be used if there are multiple occurrences. If they are not specified, the first occurrence will be used.</p> <p>{prefix} represents any literal that marks the beginning of the pattern and is required.</p> <p>"%s" marks the value to be extracted and is required.</p> <p>{suffix} represents any literal that marks the end of the pattern. If not specified, all the text between the prefix and the end of line will be extracted.</p> <p>The extracted response properties are used in the workflow process.</p>
	Text	The string to parse.
ReturnPropSet		Returns a hierarchy that contains the input properties and properties from the input hierarchy.
	PropSetType	The type of the output hierarchy.

Table 14. Inbound Email Manager Methods and Input Arguments

Method	Input Argument	Description
SetResponseFields		Constructs To, CC, and BCC lines for outbound email based on corresponding lines from inbound email.
	InputEmailBccLine	BCC line in inbound email.
	InputEmailCcLine	CC line in inbound email.
	InputEmailToLine	To line in inbound email.
	InputMsgReceiveAddresses	Receiver address in inbound email.
	InputMsgSenderAddress	Sender address in inbound email.
	InputResponseType	Reply, Reply to All, or Forward.
	OutputEmailBccLine	BCC line for outbound email.
	OutputEmailCcLine	CC line for outbound email.
	OutputEmailToLine	To line for outbound email.

Inbound Email Database Operations Business Service

This business service performs database-level actions.

Table 15 shows methods and input arguments, with descriptions, for this Siebel Email Response business service.

Table 15. Inbound Email Database Operations Methods and Input Arguments

Method	Input Argument	Description
AttachFile		Creates an attachment record.
	BusComp	Name of attachment business component.
	BusObj	Name of business object.
	ErrorMessage	The error message if an error occurs during method execution.
	FatalErrCode	The error code if a fatal error occurs during method execution.
	FileName	Name of the file to attach.
	FilePath	Path of the file to attach.

Table 15. Inbound Email Database Operations Methods and Input Arguments

Method	Input Argument	Description
DeleteRecord		Deletes a record.
	BusComp	Name of business component from which to delete a record.
	BusObj	Name of business object.
	ErrorMessage	The error message if an error occurs during method execution.
	FatalErrCode	The error code if a fatal error occurs during method execution.
	ID	ID of the record being deleted.
ExpandBCTemplate		Substitute values in a template.
	BusComp	Name of business component used to get values for template substitutions.
	ReplyMessage	Reply message with substituted values.
	ReplyTemplate	Reply template.

Table 15. Inbound Email Database Operations Methods and Input Arguments

Method	Input Argument	Description
FindRecord		Finds a record. This method respects the CaseInsensitive parameter in the CFG file. The CFG file is configured to perform case-sensitive searches by default. If you want to change this parameter to case-insensitive to search for an email address, you clear the checkbox for the Use Default Sensitivity property in the Email Address field of the Mail Agent Contact business component.
	BusComp	Name of business component from which to find a record.
	BusObj	Name of business object.
	ErrorMessage	The error message if an error occurs during method execution.
	FatalErrCode	The error code if a fatal error occurs during method execution.
	ID	ID of a record if it is found.
	QueryFields	List of comma-separated fields to query on. Query values are passed in additional arguments, with one argument per field.
	ValueFields	List of comma-separated fields from which to get values. Each field is passed back in one output argument, with the name set to the field name and the value set to the field value.
FindRecordEx	Contact Alternate Email Address QueryField: Email Address	Used only by Siebel Email Response for matching contacts when processing inbound emails. It finds all contacts in the Siebel database whose primary or alternate email address matches the From email address of the inbound email and then associates each contact found with the email activity record.

Table 15. Inbound Email Database Operations Methods and Input Arguments

Method	Input Argument	Description
GetFieldValues		Gets the field values from a record.
	BusComp	Name of business component from which to get record values.
	BusObj	Name of business object.
	ErrorMessage	The error message if an error occurs during method execution.
	FatalErrCode	The error code if a fatal error occurs during method execution.
	ID	ID of record from which to get values.
	IDField	The field on which to query for the ID.
	ValueFields	List of comma-separated fields from which to get values. Each field is passed back in one output argument, with the name set to the field name and the value set to the field value.
GetRecordList		Get a list of records.
	BusComp	Name of business component from which to get record values.
	BusObj	Name of business object.
	ErrorMessage	The error message if an error occurs during method execution.
	FatalErrCode	The error code if a fatal error occurs during method execution.
	NumberofRows	Number of records returned. Default is 10.
	QueryFields	List of comma-separated fields on which to query. Query values are passed in the additional argument fields (one argument per field.)
	ValueFields	List of comma-separated fields from which to get values. Each field is passed back in one output argument, with the name set to the field name and the value set to the field value.

Table 15. Inbound Email Database Operations Methods and Input Arguments

Method	Input Argument	Description
InsertRecord		Insert a record.
	BusComp	Name of business component to insert record into. Each field value to be set is passed as an additional input argument with the name set to Field: followed by the field name.
	BusObj	Name of business object.
	ErrorMessage	The error message if an error occurs during method execution.
	FatalErrCode	The error code if a fatal error occurs during method execution.
	ID	ID of the new record if the insert is successful.
	UseLocale	The Siebel Email Response (which workflow; Run Process?) workflow receives the date (Planned) from the driver in 24 hour format. Workflow executes the request on the server side. Siebel Server might be running on a computer using a twelve hour or twenty-four hour clock. A value of FALSE (default) indicates the server runs on a twenty-four hour clock. A value of TRUE indicates the server runs on a twelve hour clock.

How the Internet SMTP/POP3 Driver Processes Email Messages

This section contains some information about email directories, driver parameters, and an overview of how the Internet SMTP/POP3 Server driver processes email messages. For details about the directories and driver parameters included in this section, see *Siebel Communications Server Administration Guide*.

Email Directories and Driver Parameters

When the Internet SMTP/POP3 Server driver starts, it creates the following directories and by default puts them in the bin subdirectory, if they do not exist. By default, the following directories are created:

- Failed
- Incoming
- Loopback
- Processed
- Sent

If you do not wish to store messages in the bin subdirectory, you can specify a different location by changing the values for the communications driver parameters. To change the locations where messages are stored, navigate to the Administration - Communications screen and select the Communications Drivers and Profiles view. In the Driver Parameters list, choose one of the following parameters for the directory location that you want to change, and type a directory path in the Default Value column.

- Failed Email Directory
- Incoming Email Directory
- Loopback Email Directory
- Processed Email Directory
- Sent Email Directory

The following parameters control how incoming and outgoing messages are processed:

- Delete Processed Messages
- Save Sent Messages
- Return Attachments
- Process If Loopback Detected

You can change how these email messages are processed by changing the Default Value of a driver parameter. For example, if you do not want to return attachments, change the default value to FALSE.

Output Parameter Values for POP3 and SMTP Email Drivers

During email processing, the POP3 and SMTP email drivers pass output parameter values to the Communications Inbound Receiver and Communications Inbound Processor server components. From the Communications Inbound Receiver and Communications Inbound Processor server components, these values are passed to the Siebel Email Response workflows in the form properties of the EventFields property set. Table 16 provides a list of the output parameter values and a general description of how you can modify email handling behavior by accessing these values in the EventFields property set.

Table 16. Output Parameters for POP3 and SMTP Email Drivers

Parameter Name	Default Value	Description
Attachments	0	Number of nonsupplemental attachments found.
CcList		Value of <i>CC:</i> header field. This parameter is semicolon delimited as required by the Siebel application.
DsnAction		This parameter uses the <i>RFC1894</i> protocol. For more information, see http://www.faqs.org/rfcs/rfc1894.html .

Table 16. Output Parameters for POP3 and SMTP Email Drivers

Parameter Name	Default Value	Description
DsnContent		This parameter uses the <i>RFC1894</i> protocol. For more information, see http://www.faqs.org/rfcs/rfc1894.html .
DsnFinalRecipient		This parameter uses the <i>RFC1894</i> protocol. For more information, see http://www.faqs.org/rfcs/rfc1894.html .
DsnOriginalEnvelopeId		This parameter uses the <i>RFC1894</i> protocol. For more information, see http://www.faqs.org/rfcs/rfc1894.html .
DsnStatus		This parameter uses the <i>RFC1894</i> protocol. For more information, see http://www.faqs.org/rfcs/rfc1894.html .
FileCharset%d		The character set of file %d (where %d is 0 based).
FileIsInline%d		If an incoming <i>attachment</i> does not have a name associated with it, it is considered <i>inline</i> . The Siebel user interface should display the attachment in the rich edit control and not in the attachment pane. (%d is 0 based).
FileIsSupplemental%d		If the incoming <i>attachment</i> is a supplemental file created by the driver, such as the original message.txt file, this parameter is set to TRUE. Otherwise this parameter is FALSE.
FileName%d		The name of the <i>attachment</i> file. This parameter can be specified in the MIME type or synthesized based on the type/subtype of the attachment.
FilePath%d		The physical location of the file on the local hard disk. If the response group that loaded the driver is not processing email in Real-Time, this will be the location of the file on the Siebel File System.
FileSubtype%d		This is the MIME subtype of the attachment.
FileType%d		This is the MIME type of the attachment.
HasAttach		TRUE if Attachments >= 1.
HTMLBody		This will be set if the incoming email text was HTML only or was multipart/alternative with HTML.
In-Reply-To		Value of <i>In-Reply-To</i> : header field. This parameter uses the <i>RFC2822</i> protocol. For more information, see http://www.faqs.org/rfcs/rfc2822.html .

Table 16. Output Parameters for POP3 and SMTP Email Drivers

Parameter Name	Default Value	Description
IsDeliveryStatusNotification		If the incoming email is a delivery status notification as specified by the <i>RFC1894</i> protocol this parameter value will be TRUE. Otherwise, the value will be FALSE. For information on the <i>RFC1894</i> protocol, see http://www.faqs.org/rfcs/rfc1894.html .
Keywords		Value of the <i>Keywords:</i> header field. This parameter uses the <i>RFC2822</i> protocol. For more information, see http://www.faqs.org/rfcs/rfc2822.html .
LocalFileToGlobal%d		For a description of this parameter, see "Moving Generated Local Files to the Siebel File System" on page 145 .
Loopback Candidate		For a description of this parameter, see "Moving Generated Local Files to the Siebel File System" on page 145 .
Message-ID		Value of "Message-ID:" header field. We also use this as the SCAPI DriverTrackingID. For more information, see http://www.faqs.org/rfcs/rfc2822.html .
MsgClass		This parameter is obsolete.
OrigMsgFile		The incoming MIME type is saved in this local file. If the response group that loaded the driver is not processing email in <i>RealTime</i> , this will be the location on file on the Siebel File System.
Prefix		If this is a forwarded message this will be <i>Fwd</i> or <i>Fw</i> . If this is a message that is in reply to another message this will be <i>Re</i> . Otherwise this parameter will be empty.
Priority	3	This is a number from 1 to 5 with 1 being the highest priority and 5 being the lowest priority. This is extracted from the <i>X-Priority</i> or the <i>X-MSMail-Priority</i> if available.
Received		This is the date the email was retrieved from the POP3 server.
ReceiverAddress		This is the email address extracted from the <i>From Address</i> communications profile input parameter. For example, the ReceiverAddress for <i>John Smith</i> < <i>John@Smith.net</i> > would be <i>john@smith.net</i> .

Table 16. Output Parameters for POP3 and SMTP Email Drivers

Parameter Name	Default Value	Description
ReceiverName		This is the <i>proper name</i> extracted from the <i>From Address</i> communications profile input parameter. If there was no <i>proper name</i> , this will be set to the ReceiverAddress. For example, the RecieverName for <i>John Smith <John@Smith.net></i> would be <i>john@smith.net</i> .
References		Value of <i>References</i> : header field. This parameter uses the <i>RFC2822</i> protocol. For more information, see http://www.faqs.org/rfcs/rfc2822.html .
SenderAddress		The is the email address extracted from the <i>From</i> : header field. For example, the SenderAddress for <i>John Smith <John@Smith.net></i> would be <i>john@smith.net</i> .
SenderAddrType		Always empty, this parameter is not needed by the workflows.
SenderName		This is the <i>proper name</i> extracted from the <i>From</i> : header field. If there was no 'proper name', this will be set to the SenderAddress. For example, the SenderName for <i>John Smith <John@Smith.net></i> would be <i>john@smith.net</i> .
SenderReplyNames		If the <i>Reply-To</i> : header field is set, this is the value but delimited by semicolons rather than commas. If <i>Reply-To</i> : was not specified, this is the same value as the SenderAddress.
Sent		This is the date from the <i>Date</i> : header field.
SiebelChannelProfile		This is generated by Media Manager.
SiebelChannelType		This is generated by Media Manager.
SiebelChannelTypeString		This is generated by Media Manager.
SiebelDriverNotifyWhenDone		This is generated by Media Manager.
SiebelWorkItemID		This is generated by Media Manager.
Subject		Value of the <i>Subject</i> : header field.
Temp%d		If an attachment should be deleted by the processing workflow, this should be TRUE.
text/html charset		This is the <i>IANA character set</i> of the HTMLBody. This is the value of the <i>charset</i> parameter of the <i>Content-Type</i> header field.

Table 16. Output Parameters for POP3 and SMTP Email Drivers

Parameter Name	Default Value	Description
text/plain charset		This is the <i>IANA character set</i> of the TextNote. This is the value of the <i>charset</i> parameter of the <i>Content-Type:</i> header field.
TextNote		This is the plain/text message body text of the incoming message.
ToList		This is the value of the <i>To:</i> header field. This will be semicolon delimited as required by the Siebel application.

Moving Generated Local Files to the Siebel File System

The following section describes how to cause the Communications Inbound Receiver to move driver-generated local files to the Siebel File System.

The processing of driver events may occur on a remote Communications Inbound Processor server. However, this will only occur if the response group input parameter *RealTime* is set to FALSE. In previous versions of Siebel Email Response, the Communications Inbound Manager server component would always execute driver events in the same process in which the driver was loaded. This meant that the business service executed by Communications Inbound Manager server component, usually a workflow, would have easy access to any local files generated by the driver.

To allow workflows executing on a remote Communications Inbound Processor server to access driver-generated local files, the Communications Inbound Receiver will watch for EventFields with the following tag:

LocalFileToGlobal**XXX** = tag|toReplace

NOTE: XXX must start at 0 and increase contiguously.

The file *toReplace* will be moved to the Siebel File System.

tag is the key to a tag/value pair that will have the text *toReplace* replaced with the actual Siebel File System file name generated when *toReplace* was moved to the Siebel File System.

For example, the following EventFields were generated by a driver:

```
LocalFileToGlobal0=OriginalMsgFile|c:\OriginalMsgFile.txt
OriginalMsgFile=c:\OriginalMsgFile.txt
```

This example results in the local file *c:\OriginalMsgFile.txt* being moved to the Siebel File System. Assuming this file received the name *ABCDEFGH* on the Siebel File System, the EventFields would be modified as follows **before** being submitted to workflow for processing:

```
OriginalMsgFile=ABCDEFGH
```

An Overview of the Processing Flow of Inbound Email Messages

When the Internet SMTP/POP3 Server driver starts, it creates required directories such as Incoming Email. The Internet SMTP/POP3 Server driver also creates a thread that polls the POP3 server. The PollingInterval driver parameter controls the frequency at which the Internet SMTP/POP3 Server driver checks the POP3 server for messages.

If there are messages, the Internet SMTP/POP3 Server driver retrieves and processes them one at a time, up to a maximum per session equal to the value set in the POP3 Batch Size driver parameter. If the current session with the POP3 server terminates abnormally, all messages previously retrieved, processed, and deleted during the current session will be restored, retrieved, and processed again the next time the Internet SMTP/POP3 Server driver connects to the POP3 server. The smaller the value POP3 Batch Size driver parameter, the fewer duplicate messages will be created and processed if a restart occurs.

Messages in a session are processed as shown in the following steps:

1 A message is saved in the Incoming Email directory.

2 The POP3 DELE command deletes the message from the POP3 server.

If the DELE command fails, the message stored in the Incoming Email directory is erased because it will be retrieved again in the next POP3 session.

NOTE: You should not have other email clients accessing the mailboxes that Siebel Email Response is monitoring because the email driver deletes the messages from the POP3 server when they are processed by Siebel Email Response. As such, these messages will not be visible from another client.

3 The disk based message is parsed. The parsing produces the following files in the Incoming Email directory:

a OriginalMessageText_*[the original header of the message along with all text parts concatenated together]*.txt.

b Any attachments parsed from message are given unique names in the following format:

ATT_*[the original header of the message along with all text parts concatenated together]*.DAT.

c Any remaining text or HTML fragments are turned into attachments and are given unique names in the following format:

ATT_*[the original header of the message along with all text parts concatenated together]*.DAT.

4 If an error occurs when the message is parsed, the following events occur:

a A temporary file in the following format is moved to the Failed Email directory and any attachments created are deleted:

pop3_*[the original header of the message along with all text parts concatenated together]*.tmp

b The POP3 session is immediately terminated with a QUIT command so that the offending message is permanently deleted from the server.

- 5 If the Loopback Detection Interval parameter value is greater than zero and the message sender is currently being blocked, the following events occur:
 - If the Process If Loopback Detected parameter value is FALSE, the message is moved to the Loopback Email directory.
 - If the Process If Loopback Detected parameter value is TRUE, the driver's Loopback Candidate flag is set to TRUE and the message continues processing.
- 6 If the message is not moved to the Loopback Email directory or flagged as a loopback candidate, the pop3_*[the original header of the message along with all text parts concatenated together]*.tmp file is processed as follows:
 - If the Delete Processed Messages parameter value is TRUE, the temporary file is deleted.
 - If the Delete Processed Messages parameter value is FALSE, the temporary file is moved to the Processed Email directory.
- 7 The primary message text, header information (subject, to, cc, date, and so on), Loopback Candidate flag, and references to the attachments are passed to the driver's creator (usually Communications Inbound Receiver and Communications Inbound Processor).
- 8 The OriginalMessageText file and all the attachments are not deleted by the SMTP/POP3 driver. It is the responsibility of the workflow invoked by CIM to delete all the attachments.

CAUTION: Any errors that occur in the workflows may strand the ATT_OriginalMessageText files in the Incoming Email folder. If this occurs while CIM is not running, the workflow invoked by CIM failed to process a message event. The safe way to determine if an ATT_OriginalMessageText file can be deleted is to stop CIM and then look at the contents of all the queued CIM Events in all response groups to make sure that the ATT_OriginalMessageText files are no longer being referenced.

Processing Internally Generated Attachments in Siebel Email Response

The following sections describe how Siebel Email Response generates attachments when inbound mail comes in and when outbound mail goes out.

Attachments Created When Inbound Email Is Received

Siebel Email Response generates internal attachments upon receipt of plain text or HTML emails. These internally generated attachments appear in addition to any external attachments associated with the email by the email sender. [Table 17](#) describes the attachments created. When a plain text email is received into Siebel Email Response, one internally generated attachment is created called Original Message.txt. This contains the MIME format of the message as received by the SMTP/POP3 driver. When an HTML email is received in Siebel Email Response, two internal attachments are generated: the Original Message.txt and texthtml.htm, which contains the email in HTML formatting. This attachment is essentially the same as the incoming email message seen in the Incoming Message form or the Outgoing Message form (when user preferences are set as follows: Default Message Format = HTML, Original Message is Included in Reply = TRUE). No internally generated attachment is sent with a Reply, Reply to All, or Forward message.

Table 17. Incoming Email Attachments

Incoming Email Format	Attachments Created
HTML	Original Message.txt
Plain Text	Original Message.txt

Attachments Created When Outbound Email Is Sent

When sending outbound emails, internally generated attachments are created for those outbound emails whose message size is greater than 16KB (~15000 characters). These internally generated attachments are called SiebelLongEmailBody and are stored with the email activity record in the Siebel application but are not sent with the outbound message. [Table 18](#) describes what kind of attachments are created. Whether or not the email is greater than or less than 16KB, the outgoing message will contain the entire email in the body of the message without any internally generated attachments. This attachment is created so that any message of greater than 16KB can be stored in the Siebel file system because there is a database limitation of 15000 characters for any email. Additionally, this attachment allows the entire text of the email to be visible in the Outgoing Message form and sent to the email recipient in the body of a single email message.

Table 18. Outgoing Email Attachments

Default Message Format	Attachments Created for Email greater than 16KB
HTML	SiebelLongEmailBody.htm
Plain Text	SiebelLongEmailbody.txt

NOTE: Default Message Format is set in the Outbound Communications view of the User Preferences screen. For more information about setting user preferences, see *Applications Administration Guide*.

Upgrading to Siebel Email Response Release 7.7

This section describes some upgrade features and provides information about upgrade preparations. It is recommended that you export and save the configuration values discussed in this section. You will need these configuration parameters when you configure new elements after the upgrade.

For general upgrade information used primarily by System and Database administrators, see the *Upgrade Guide* for your operating system.

Siebel Email Response Business Services and Workflow

Release 7.7 of Siebel Email Response uses the Workflow Process Manager business service to call all workflow processes. Other business service methods can be called from within the workflows. The following business services used by Siebel Email Response will migrate from Release 6.x to Release 7.7, with exceptions noted:

- **Inbound Email Manager.** Customization of this business service will migrate but customization of its methods will not migrate.

In Release 7.7, the `CreateRecord` and `ProcessServiceRequest` methods have been incorporated into workflow processes. These method names will not be in the Inbound Email Manager business service.

Any modifications you made to the `CreateRecord` and `ProcessServiceRequest` methods will need to be reentered by you in the eMail Response - Process Message and eMail Response - Process Service Request workflows, respectively.

- **Inbound Email Database Operations.** Customization of this business service will not be migrated.
- **Outbound Communications Manager.** Customization of this business service will not be migrated.

Response Groups and Input Arguments

Existing input arguments and default input arguments for response groups will be imported. Before upgrading, export your input arguments for all 6.x business services and methods to a file and save it.

Customized Mail Agent Business Components from Release 6.x will migrate, but the business components will be used in workflow steps instead of being specified as input arguments to the response group. After Upgrading, customers should perform the following tasks on all Siebel Email Response workflows:

- Change the business service to Workflow Process Manager and the method to Run Process.
- Delete all input arguments, and add a single argument called `ProcessName`. In the input argument value field for `ProcessName`,

- Type eMail Response - Process Message to replace CreateRecord (Inbound Email Manager business service)
- Type eMail Response - Process Service Request to replace ProcessServiceRequest (Inbound Email Manager business service).

If response groups called workflow processes in Release 6.x, you may be able to use them with modifications. Depending on the number of changes to the workflows, it may be easier to use a standard workflow that accomplishes the same task.

Response Properties

Response properties have been replaced by the ParseText method on the Inbound Email Manager business service. This method uses one fixed input argument (Text) that specifies the text for which you are looking and one input argument for each response property that you want to parse. For example, for the Text input argument Service Request#, the response property is 24-57689.

- The name of this additional input argument is customer-specified, and it corresponds to an output argument of the same name that will contain the parsed property value. For more information, see ["Siebel Email Response and Business Services" on page 131](#).

Siebel Email Response Templates

Templates from Release 6.x will be migrated during your upgrade. In Release 7.7, recipient groups control the substitution fields that are available for templates. Therefore, your templates will have to be recreated if the substitution fields no longer exist. To make sure the imported templates are accurate, you may need to recreate your templates in Release 7.7 You can copy and paste text from an old template into a new one. The following list contains information about specific types of templates:

- Release 99.5 templates (such as Submit - OK, Submit - Error, Logon Failure, and so on) have been replaced by standard templates and are no longer specified as input arguments. For example, the Submit - OK template is now the eMail Response - SR Submit template.
- Four default templates have been added to the seed data and will not be migrated: Srapage.txt, srmal.txt, Srnpage.txt, and srresolve.txt.
- Additional customer-created message templates, such as those for Send Email, should be upgraded manually by adding them to the template table and changing the macro to the following format:
 - Use a start bracket ([) and an end bracket (]) instead of percent signs (%) to enclose the macro.
 - Add the business component name in front of the field name. For example, enter Service Request.SR Number instead of SR Number.

Siebel Email Response Communications Drivers (Adapters) and Profiles

Make sure you export all the values for adapters and profiles in your current communication configuration. You will need these configuration parameters when you configure drivers in Release 7.7.

- Some drivers (called adapters in previous releases) that were available in Release 6.x are not supported in Release 7.7, including Extended MAPI, Microsoft Exchange Server, and Microsoft SMTP Service. Profiles that used these adapters will need to be recreated using the Internet SMTP/POP3 server driver. Use the exported values file to create new drivers.
- Profiles using the Internet SMTP/POP3 Server Adapter in 6.x will upgrade to the Internet SMTP/POP3 server driver. There are new parameters, but they are not required. For information about new parameters, see *Siebel Communications Server Administration Guide*.
- Profile parameter overrides will not migrate. Use the exported values file to recreate these profiles.

My Incoming Email and All Incoming Email Views

If you customized your My Incoming Email and All Incoming Email views in Release 6.x, your changes will not migrate to Release 7.7. The same functionality exists in Release 7.7, but you will need to customize your My Communications, My Team's Communications, and All Communications views after you install Release 7.7.

B

Siebel File System Utility

This appendix covers using the Siebel File System Utility with Siebel Email Response. It includes the following topic:

- [“Using the Siebel File System Utility with Siebel Email Response”](#)

Using the Siebel File System Utility with Siebel Email Response

The Communications Inbound Receiver and Communications Inbound Processor use the Siebel File System for temporary storage and to hold copies of any attached files. To clean up any orphan files (files with no corresponding record in the database) in the file attachment directory, you can use a command-line utility, `sfscleanup.exe`. However, to avoid accidentally removing any files created by Communications Inbound Receiver, make sure that you do *not* use the `/g` option when using the `sfscleanup.exe` utility.

For more information on using the `sfscleanup.exe` utility to clean up the Siebel File System and a list of `sfscleanup.exe` parameters, see *Siebel System Administration Guide*.

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