SIEBEL 7

eBusiness

SIEBEL WIRELESS ADMINISTRATION GUIDE FOR FINANCIAL SERVICES

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Introduction

This guide explains how to install, set up, and configure Siebel Wireless for Financial Services. It also describes how to use the product after it is set up.

NOTE: Siebel Wireless for Financial Services products use the same basic architecture as other Siebel Wireless eBusiness Applications. In the interests of brevity, after the first mention of Siebel Wireless for Financial Services in this document, the name will be given in abbreviated form, as simply Siebel Wireless. Such reference to the product using an abbreviated form should be understood as a specific reference to the associated Siebel Financial Services product, and not any other Siebel Systems offering. When contacting Siebel Systems for technical support, sales, or other issues, note the full name of the product to make sure it is properly identified and handled.

Although job titles and duties at your company may differ from those listed in the following table, the audience for this guide consists of employees in these categories:

Siebel Wireless Users	End users of the application who access Siebel data through a browser-enabled or text messaging-enabled wireless device.
Siebel Application Administrators	Persons responsible for planning, setting up, and maintaining Siebel applications.
Siebel Application Developers	Persons who plan, implement, and configure Siebel applications, possibly adding new functionality.
Siebel System Administrators	Persons responsible for managing the whole system, including installing, maintaining, and upgrading Siebel applications.

This guide assumes familiarity with Siebel Tools and with Siebel eBusiness Applications, including such concepts as views, applets, screens, and responsibilities.

How This Guide Is Organized

This guide is organized by the different tasks required to use and manage Siebel Wireless and the different audiences who will perform the tasks. For example, information about installation and setup is separate from instructions on using the product.

Revision History

Siebel Wireless Administration Guide For Financial Services, Version 7.5, Rev. A.

April 2003 Bookshelf

Book Version: Rev A

Table 1. Changes Made in Rev. A for April 2003 Bookshelf

Topic	Revision
"Preventing Picklists from Displaying a Blank Line" on page 45	Added new topic

Additional changes

Revised book for HTML delivery, including updating of procedure text to reflect current standards.

Getting Started 1

Siebel Wireless for Financial Services brings together wireless communications, the Internet, and Siebel eBusiness content to allow organizations to communicate with customers, partners, and employees through a wireless channel. Siebel Wireless applications include:

Siebel Wireless for Financial Services includes the following applications:

- Siebel Wireless eFinance (Sales or Service option)

- Siebel Wireless eInsurance (Sales or Service option)

- Siebel Wireless Banking and Brokerage

NOTE: Siebel Wireless for Financial Services products use the same basic architecture as other Siebel Wireless eBusiness Applications. In the interests of brevity, after the first mention of Siebel Wireless for Financial Services in this document, the name will be given in abbreviated form, as simply Siebel Wireless. Such reference to the product using an abbreviated form should be understood as a specific reference to the associated Siebel Financial Services product, and not any other Siebel Systems offering. When contacting Siebel Systems for technical support, sales, or other issues, note the full name of the product to make sure it is properly identified and handled.

Users typically connect to Siebel Wireless by entering the URL in their mobile device's Web browser and bookmarking the site. Users can return to the site any time by selecting the bookmark.

Before using Siebel Wireless, users must authenticate by providing a valid user name and password, just as they would if using another type of Siebel client. Once connected to the database, users interact with the browser-based application by pressing the keys on their mobile device.

Siebel Wireless users can view, edit and create information in their companies' Siebel database. For example, they can:

■ Update sales opportunities

■ Search for account information

■ Access calendar and contact details

■ View order and parts status

■ Respond to service requests

■ Transfer funds and pay bills

NOTE: Siebel Wireless Messaging is a separately-licensed Siebel product option that lets you push alerts and notifications to employees, partners, and customers who use wireless devices and receive responses from them. For detailed information, see *Siebel Communications Server Administration Guide.*

Siebel Wireless uses the same set of business objects, the same development toolset (Siebel Tools), and the same logical data model as all other Siebel eBusiness Applications. Specifically, Siebel Wireless takes advantage of prebuilt wireless thin client templates and views and Siebel Systems Web-based architecture to deliver wireless access to Siebel content and data.

Siebel Wireless includes the license for Siebel Mobile Connector, through which you can develop additional voice, wireless, and other applications. The Siebel Mobile Connector is a standards-based API delivering well-formed XML from an optimized Siebel application definition. This gives the calling application a definition of user interface and user data in XML format.

Siebel partner and customer application developers can give mobile users real-time or near real-time access to Siebel eBusiness information through a variety of mobile devices, access to external data sources, and additional capabilities. For additional details, see Appendix B, "Siebel Mobile Connector."

Architecture Overview

Siebel Wireless allows users to read from, write to, and search the Siebel database through a wireless connection between the mobile device and a Web server. During a Siebel Wireless connection, the following components are involved:

■ **A Siebel database**. This is the data that Siebel Wireless users will access. This database also requires a third-party database server.

■ **A Siebel Server, including a Siebel Wireless Object Manager**. These components execute all business logic for the Siebel Wireless application.

■ **A Web server and the Siebel Web Server Extension**. This software serves the Siebel Wireless templates and views that are generated as Web pages on the user's wireless browser.

■ **A wireless gateway server**. When Siebel Wireless renders Siebel content in WML, a wireless gateway server is necessary to translate data from the Internet protocol (HTTP) to the wireless application protocol (WAP). The WAP gateway server also usually binary-encrypts and compresses the data for transport over wireless networks. This wireless gateway server can be hosted by an enterprise behind its firewall, or instead by an external wireless network operator or application service provider.

■ **A browser-enabled mobile device**. This is a device (often a mobile phone or a personal digital assistant) capable of accessing the Internet wirelessly and displaying Web pages on a wireless browser.

Figure 1 illustrates Siebel Wireless architecture.
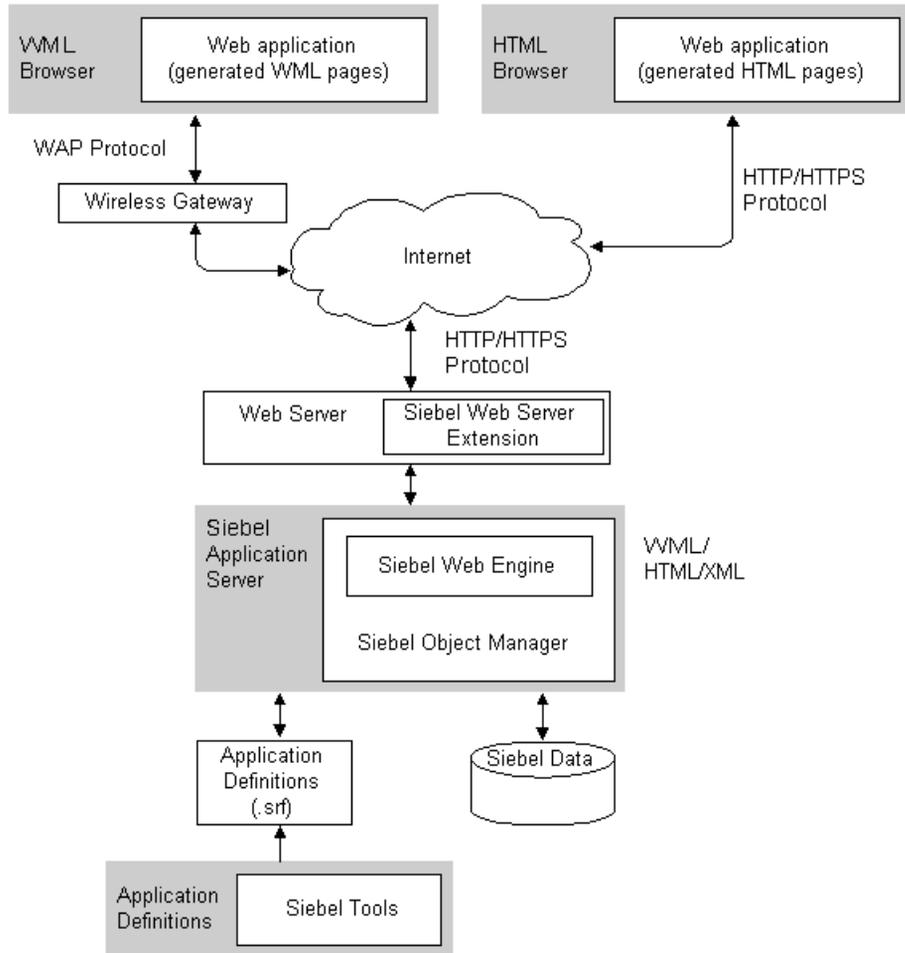
Figure 1. Siebel Wireless Architecture

Installing Siebel Wireless 2

Siebel Wireless applications are separately-licensed Siebel product options that are integrated into the architecture of Siebel applications, sharing the same Siebel Server, tool set (Siebel Tools), and installer as the rest of the Siebel eBusiness Applications suite.

As such, this document focuses on the incremental steps required to enable Siebel Wireless as part of installing the Siebel eBusiness Applications for Financial Services suite, along with setup and configuration considerations specific to the Siebel Wireless product options.

Siebel Wireless generally supports the platforms supported by other Siebel eBusiness applications. Specific exceptions for Siebel Wireless are noted where appropriate. See *Siebel System Requirements and Supported Platforms* for your Siebel application for general information on supported platforms and installation instructions for Siebel eBusiness applications.

Installation Prerequisites

Siebel Wireless applications are Siebel product options that must be licensed separately from other Siebel eBusiness Applications.

While in many cases Siebel Wireless applications complement and enhance Siebel Web Client applications, customers do not need to license a seat of a Siebel Web Client application (for example, Siebel Sales) for each Wireless seat (for example, Siebel Sales Wireless) that they plan to deploy. However, at least one seat of a Siebel Web Client application is required to allow an administrator to administer and maintain Siebel Wireless applications (for additional details, see "Siebel Web Client Administrator Access" on page 19).

License keys are available for the following Siebel Wireless applications:

■ Siebel Wireless eFinance (Sales or Service option)

■ Siebel Wireless eInsurance (Sales or Service option)

■ Siebel Wireless Banking and Brokerage

Before you begin installing Siebel Wireless applications, make sure that you have the appropriate license keys for the number of wireless users that your enterprise plans to support.

Wireless-Enabled Devices

A wireless-enabled mobile device with a Web browser and Internet service is required to use Siebel Wireless applications. Devices and browsers that can be used with Siebel Wireless include most mobile devices with WAP/WML 1.1-compliant browsers, and most mobile and pocket HTML browsers.

Through Siebel's XML Web Interface, support for a variety of additional wireless browsers (including non-WML or HTML wireless browsers) can be configured. See the section "Supporting Wireless Requests with Multiple Markup Languages" on page 57 for additional information.

Follow the instructions that came with your wireless device for getting onto the Web.

Siebel Web Client Administrator Access

Enterprises using Siebel Wireless must have access to application and server administration functionality through the Siebel Web Client to perform setup configuration tasks required to administer and maintain Siebel Wireless applications.

This access allows systems administrators to perform administrative tasks such as those described in the sections "Assigning Wireless Responsibilities to Users" on page 22 and "Tuning Performance and Scalability" on page 23.

Setting Up Web Servers to Support WML MIME Types

Siebel Wireless supports wireless-enabled devices with WAP/WML browsers, and also mobile and pocket HTML browsers.

To support WAP/WML browsers, Siebel Wireless requires that the Web Servers (through which Siebel Wireless traffic is routed) support the following MIME types, shown in Table 2.

Table 2. MIME Types

Associated Extension	Content Type (MIME)
.wbmp	image/vnd.wap.wbmp
.wml	text/vnd.wap.wml
.wmlc	application/vnd.wap.wmlc
.wmls	text/vnd.wap.wmlscript
.wmlsc	application/vnd.wap.wmlscriptc

Refer to the documentation for your Web server for further instructions on where and how to configure support for these MIME types.

Installation Prerequisites

External IP Address

If your Siebel Wireless applications are accessed through external wireless gateway servers outside of your network firewall, you must establish an external IP address to facilitate such external access. This external IP address can be filtered to allow only certain originating IP addresses, protocols, and ports to enter the enterprise's router, if desired for security purposes.

Typically, required access to Siebel Wireless applications may be granted by opening only Port 80 in your firewall. For increased security, it is recommended that you create an IP Allow filter for your firewall. This filter should only allow incoming traffic through HTTP Port 80 from the originating IP address of the carrier's wireless gateway to the destination external IP address of your enterprise Web server. Contact your network administrator and your IT security department for more information. Contact your wireless Internet service provider for information on the ports that they require to be exposed to interact with Siebel Wireless applications.

When Siebel Wireless renders Siebel content in WML, a wireless gateway server is necessary to translate data from the Internet protocol (HTTP) to the wireless application protocol (WAP). For a general discussion of WAP server deployment options, see Appendix C, "WAP Server Deployment Options."

Incremental Installation and Configuration

Siebel Wireless applications are separately licensed Siebel product options that are integrated into the Siebel architecture, sharing the same Siebel Server, tool set (Siebel Tools), and installer as the rest of the Siebel eBusiness Application suite.

This section focuses on the incremental steps required to enable Siebel Wireless as part of installing Siebel eBusiness Applications, along with setup and configuration considerations specific to the Siebel Wireless product options. Specific installation and configuration steps required to begin using Siebel Wireless are described in the following sections.

Required Server Components

Siebel Wireless applications require the installation of both the Siebel Enterprise Server (including the Siebel Server and the Gateway Name Server) and the Siebel Web Server Extension.

Required Siebel Component Groups

The Siebel Financial Services component group must be deployed within the Siebel Server to gain access to the application functionality.

This component group can be deployed during the installation of the Siebel Server, or it can be deployed after the Siebel Server has been installed. See the *Siebel Server Installation Guide* for the operating system you are using for additional details on deploying component groups after the Siebel Server has been installed.

Siebel Correspondence uses a Siebel Document server to display documents through the Web from other applications, such as Microsoft Word, Microsoft PowerPoint, Lotus WordPro, and Lotus Freelance Graphics. Correspondence in Siebel Wireless requires that a Siebel Document server be operating as host for one instance of the eDocuments component group.

The Siebel Document server supports Windows 2000 and XP platforms.

For information about setting up the document server, see *Applications Administration Guide*.

Server Configuration Files

Server configuration files are created for the Siebel Wireless applications during installation. These .cfg files are language-specific and are stored in language-identified directories. For example, the .cfg file for English can be found in the \siebsrvr\BIN\ENU directory. The files are:

■ finswpsales.cfg for Sales

■ finswpserv.cfg for Service

■ wpbanking.cfg for Banking

Assigning Wireless Responsibilities to Users

Four responsibilities are defined within the Siebel seed data to support the various Siebel Wireless applications available with Siebel eBusiness Applications. These responsibilities, along with the Siebel Wireless applications for which they were created, are as follows:

■ Sales Representative - Wireless (for the Wireless Sales application)

■ Field Service Representative - Wireless (for the Wireless Service application)

■ Registered Customer - Wireless Banking (for the Wireless Banking and Brokerage application)

■ Wireless Administrator (for all Wireless applications)

In addition to access to specific screens on their mobile device, users may use the Mobile screen on the Siebel Web client to personalize their own device, including the main menu display and the sort order of records. For information about the Mobile screen, see "Personalizing Your Wireless Device" on page 72.

These responsibilities can be assigned to Siebel users using the same procedure through which responsibilities for other Siebel eBusiness Applications are assigned, as described in *Applications Administration Guide* on the *Siebel Bookshelf*.

Tuning Performance and Scalability

Several different parameters within the Siebel configuration files and within the Siebel application itself impact the performance and scalability achievable by Siebel Wireless applications.

The values of these parameters can be increased or decreased to support different numbers of concurrent users.

The first set of parameters that can be configured reside in the Siebel Web Engine's configuration file. These parameter settings can be viewed and updated by opening the eapps.cfg file located in the SWEApp/bin directory created during installation on the machine in which the Siebel Web Server Extension is installed.

Parameters to consider within the eapps.cfg file when tuning for scalability and performance include:

■ **AnonUserPool.** Governs the maximum number of anonymous logins allowed at one time. For a typical configuration, this value is set to 10% to 15% of expected concurrent users to be supported. For additional information about the AnonUserPool parameter, see the *Siebel Server Installation Guide* for the operating system you are using.

■ **SessionTimeout.** Governs the amount of time (in seconds) allowed before individual user sessions time out. The number of anonymous logins required typically increases as the duration of the Session Timeout parameter increases. The Session Timeout parameter could be set to 3600 (seconds, or 1 hour) for a typical configuration.

   SessionTimeout parameters are defined in sections specific for each language under the following headings in the eapps.cfg file for each of the Siebel Wireless applications as follows:

   ■ Under the /finswpsales_ < language > heading, for Sales

   ■ Under the /finswpserv_ < language > heading, for Service

   ■ Under the /wpbanking_ < language > heading, for Banking

Once these parameters have been modified, the Siebel server should be stopped and started to force the new parameter values into effect.

Several parameters should also be configured from within the Siebel Web Client by a user with systems administrator access to support various Wireless concurrent usage levels. These parameters can be updated by navigating to Server Administration > Components > Component Parameters.

The parameters listed below are included for each of the following three Server Components, and must be updated for the particular server components representing the Siebel Wireless applications that are used. The three Server Components to consider are:

■ Siebel FINS Sales Wireless (representing Siebel Wireless Sales)

■ Siebel FINS Service Wireless (representing Siebel Wireless Service)

■ Siebel Banking Wireless (representing Siebel Wireless Banking and Brokerage)

The following parameters must be set for the appropriate Server Components listed above for each of the Siebel Wireless applications that are used:

■ **Minimum MT Servers.** Defines the default number of multithreaded server processes that are started for a component that has multithreading enabled. In a typical configuration to support 100 concurrent wireless users, this value is set to 5.

■ **Maximum MT Servers.** Defines the maximum number of multithreaded server processes to be run concurrently for a component that has multi-threading enabled. In a typical configuration to support 100 concurrent wireless users, this value is set to 20.

■ **Maximum Tasks.** Defines the maximum number of background mode, batch mode, or interactive mode processes or threads that can run concurrently for a component. In a typical configuration to support 100 concurrent wireless users, this value is set to 600.

NOTE: The value input for the Maximum Tasks parameter must be a multiple of the Minimum MT Servers parameter and the Maximum MT Servers parameter.

More general performance setting details can be found in the Siebel Server installation guide for your operating system.

Auto Login and Auto Registration

The Siebel Wireless Auto Registration feature captures the addressing information required to allow particular users to log in to Siebel Wireless applications without manual authentication. The Auto Registration and Auto Login features must be used in conjunction with a browser that identifies its unique subscriber number in its HTTP header. Browsers from Openwave (formerly Phone.com) provide the information required to use these features.

Auto Login permissions can be set by the systems administrator to grant individual users their Siebel user name and password when they access Siebel Wireless using particular devices, to allow them to access Siebel Wireless applications without having to input this information manually. Alternately, enterprises can allow their users to administer their own Auto Login permission levels, if desired.

The Auto Login feature also requires that authentication be performed through a directory server, as described in the section "Authentication and Access Control" on page 28.

Setting the Default Auto Login Level

The default Auto Login level for the individual Siebel Wireless applications (Sales, Service, and Banking and Brokerage) is set in the server configuration file for each of those applications.

The default Auto Login level is applied to all users with supported wireless browsers contacting the Siebel Wireless application, unless systems administrators or individual users have set different preferences for their Auto Login level as described above.

The default Auto Login level set for Siebel Wireless applications during installation is Trusted. This default Auto Login level can be changed by setting the "Auto LoginLevel" = parameter in the [SWE] section of the configuration files described above to Password or None as desired. For example:

```
[SWE]

AutoLoginLevel = Password
```

As with other configuration file changes, the server must be stopped and restarted after making this change.

NOTE: When resetting the default Auto Login level, use the exact Language Independent Code value for the Auto Login level desired, as described in the section "Siebel Data Required by the Auto Login Feature" on page 27.

The Auto Registration Process

Users can automatically register additional mobile devices from the Siebel Web client through the Mobile Device screen. During Auto Registration, a new mobile device record is automatically created in the mobile device table for a user the first time that user logs in using a device with a supported wireless browser. Device names are automatically assigned to devices that are registered through the Siebel Wireless Auto Registration process, as follows:

device < Priority number > for < truncated User ID >

Here, < Priority number > is set to the next highest priority available for that particular user, and < truncated User ID > is the first 35 characters of the user's Siebel User ID. If any device for a user is assigned the last priority (6 - Unranked), there are no more priority numbers available, and the user cannot register another device using Auto Registration.

Additionally, a new device address is created in the mobile device address table, which uniquely identifies that device for Auto Login purposes.

See "Personalizing Your Wireless Device" on page 72 for additional information on Auto Registration entries and the mobile device and mobile device address tables.

Setting Auto Login Permissions

Auto Login permissions can be set by the systems administrator for a particular user and device using the Communications Administration > Mobile Devices view. Users can administer their own Auto Login permission levels in the Mobile Devices View (see Chapter 4, "Using Siebel Wireless," for more information on using this view).

Any of three different login permission levels can be defined for a user's device:

■ User Name and Password - Wireless users must enter their full user name and password to access Siebel Wireless applications.

■ Password Only - Wireless users must enter only their password to access Siebel Wireless applications. Their user name is granted automatically and need not be entered on the wireless device when logging in.

■ Automatic Login - A wireless user's user name and password are granted automatically when that user accesses the Siebel Server. The user is taken directly to the appropriate Siebel Wireless main menu without logging in manually.

Siebel Data Required by the Auto Login Feature

The Siebel Wireless Auto Registration and Auto Login features require the existence of several entries in the Siebel database to function properly. Each of these entries and supporting infrastructure has already been defined in the seed data provided with Siebel Wireless, so these entries do not need to be created by Siebel customers.

Records required to remain in the Siebel Database for the Siebel Wireless Auto Registration and Auto Login features to work properly include:

■ The predefined Siebel List of Values of Type = "MOBILE_DVC_AUTOLG" with the Language Independent Code values contained in Table 3. No alterations may be made to the text of this Language Independent Code—it must remain exactly as specified in the table for the Auto Login feature to work properly.

NOTE: The Display Values, which are actually displayed to end users through the Web Client Mobile screen, can be configured as desired.

Table 3. Auto Login Values

Required Language Independent Code	Values Configurable Display Values
None	User Name and Password
Password	Password Only
Trusted	Automatic Login

■ The Siebel WAP v1.1 Profile Communications Driver and its predefined "WAP v1.1 Profile" Siebel Communications Profile, which can be viewed from the Siebel Web Client by a user with Systems Administrator access by navigating to Communications Administration > Communications Drivers and Profiles.

Authentication and Access Control

Siebel Wireless applications generally support the user authentication strategies, steps for registering and administering users, and steps for controlling user access to data described on the *Siebel Bookshelf*. Please refer to *Security Guide for Siebel eBusiness Applications* for detailed instructions on setting up an authentication architecture for Siebel Wireless and other Siebel eBusiness applications.

Specific considerations and limitations of Siebel Wireless applications with respect to authentication and access control involve enabling directory server support as required for the Siebel Wireless Auto Login feature, as described in the following section.

Directory Server Support for Trusted Auto-Login

Trusted Auto-Login refers to automatic login of both the user name and password. When the Siebel Wireless Auto Login feature is enabled and a user attempts to log in to a Siebel Wireless application with a particular device for the first time, the user is requested to log in to the Siebel Wireless application using a standard Siebel user name and password.

If this initial login is successful, a second entry is created in the directory server to contain the Auto Login information for that user's particular device. This device entry in the directory server is used subsequently by the Auto Login feature to log in the user's device to Siebel Wireless applications.

Support for the Auto Login feature requires the use of external authentication through a Siebel Security Adapter. The Siebel-provided LDAP and ADSI Security Adapters should be configured to use the Adapter Define Username feature as described in this section.

The Siebel Wireless Auto Login feature requires the following parameters to be set as listed in each of the Siebel Wireless server configuration files for which Auto Login will be enabled. This information must be listed in the configuration file section appropriate to the security adapter you are using, that is [LDAP]:

■ UseAdapterUsername = TRUE

> **NOTE:** The Siebel Wireless Auto Login feature can only be used in conjunction
> with Security Adapters that support setting the "UseAdapterUsername"
> parameter to "TRUE".

■ SiebelUsernameAttributeType = displayname

■ UsernameAttributeType = Description

> **NOTE:** Other attributes than displayname and Description can be used if desired
> or if required by the security adapter you are using. If other attributes are
> chosen, these must be consistent with required entries in the directory server.
> Because you will create records based on these attributes in the directory server,
> these attributes should not be changed once they are put into use. If they are
> changed, records created using previous attributes will be unusable by the Auto
> Login feature.

An example of all entries required in the Wireless server configuration files to
support Auto Login when using an LDAP security adapter is as follows:

```
[SecurityAdapters]
LDAP                     = LDAP

[LDAP]

DllName                  = sscfldap.dll (for windows
                           libsscfldap.so (for UNIX)
ServerName               = <servername.domain.com>
Port                     = <server port no., e.g., 389>
BaseDN                   = "ou=People, o=siebel.com"
SharedCredentialsDN      =
UsernameAttributeType    = Description
PasswordAttributeType    = userPassword
CredentialsAttributeType = mail
RolesAttributeType       = roles
SslDatabase              =
ApplicationUser          =
ApplicationPassword      =
EncryptApplicationPassword = FALSE
EncryptCredentialsPassword = FALSE
```

```
SingleSignOn              = FALSE
TrustToken                =
UseAdapterUserName        = TRUE
SiebelUsernameAttributeType= displayname
; UseRemoteConfig         =
```

Additionally, directory server entries with the following attributes must be created for each Siebel Wireless user that will use the Auto Login feature:

Table 4. Directory Server Entries

Attribute Name	Value
Uid	< Siebel user name >
Email Address	username = < Siebel anonymous user name > password = < anonymous user's password >
Description	< Siebel user name >
Displayname	< Siebel user name >
Password	< Siebel user password >

Each of these users must also be added to the Directory Administrators group.

Finally, for each server component representing a Siebel Wireless application for which Auto Login will be enabled, the following component parameter values must be set through the Siebel Server Administration > Components user interface:

■ The Current Value of the OM - Username BC Field server component parameter must be set to Login Name.

■ The Current Value of the Security Adapter Name server component parameter must be set to LDAP or as appropriate for the security adapter being used.

International Code Page Support

Siebel Wireless supports UTF-8 Unicode, a character encoding standard. For those browsers that do not support Unicode, Siebel Wireless supports appropriate local code pages.

You invoke local code pages by setting up a UnicodeSupport = FALSE capability in the Web Browser Administration screen in the Siebel Web client.

To add non-Unicode support for a browser

1 In the Siebel Web client, navigate to Site Map > Web Browser Administration > Browsers.

The Browsers list displays the names and descriptions of the browsers set up in the system.

2 Select the entry for which you want to provide local code page support, or if there is no entry, create one by selecting New Record from the drop down list.

3 With the browser selected, click the Capabilities tab.

The Capabilities list displays the parameters associated with the selected browser. You can select an existing capability and edit it, or you can create a new capability.

4 If the UnicodeSupport Capability Name appears in the list, select it, click Edit and set the Capability Value = FALSE. Save the record.

5 If the UnicodeSupport Capability Name does not appear in the list, click New.

The Add Capabilities dialog box appears. UnicodeSupport may or may not appear on the list of capabilities.

- If UnicodeSupport appears in the list, go to .

- If UnicodeSupport does not appear in the list, go to .

6 If UnicodeSupport appears in the list, do the following:

   a Select UnicodeSupport in the list and click OK.

   b In the Capabilities list, select UnicodeSupport, click Edit and set the Capability Value = FALSE.

   c Save the record.

7 If UnicodeSupport does not appear in the list, do the following:

   a Click New. The Capability form appears.

   b Enter the following values: Capability Name = UnicodeSupport. Capability Value = FALSE.

   c Save the record.

Subsequently, wireless applications automatically apply local code pages for each supported language. Table 5 identifies the code page for each language.

Table 5. Code Pages

Language	3-Letter Code	Code Page
Dutch	NLD	ISO-8859-1
French (standard)	FRA	ISO-8859-1
German (standard)	DEU	ISO-8859-1
Italian	ITA	ISO-8859-1
Spanish (modern sort)	ESN	ISO-8859-1
English	ENU	ISO-8859-1
Brazilian Portuguese	PTB	ISO-8859-1
Danish	DAN	ISO-8859-1
Swedish	SVE	ISO-8859-1
Korean	KOR	KS_C_5601-1978
Japanese	JPN	Shift_JIS

Configuring Siebel Wireless   3

The user interface and behavior of many aspects of the Siebel Wireless applications can be configured to address your particular business needs using the same tool set (Siebel Tools) and other infrastructure as the rest of the Siebel eBusiness Applications suite.

This chapter focuses on three main areas in which the configuration of Siebel Wireless applications can be modified:

■   The Siebel Wireless application server configuration files.

■   The Siebel Wireless objects defined in Siebel Tools.

■   The Siebel Wireless template files (including wireless Web templates and XSL stylesheets).

This chapter focuses specifically on configuration considerations for the Siebel Wireless thin client applications, and references other documents on the *Siebel Bookshelf* for more general information on configuring Siebel eBusiness applications.

Configuring with Server Configuration Files

The following server configuration files are created for the various Siebel Wireless applications during the installation of Siebel eBusiness Applications. These files can be found in the \siebsrvr\BIN*lang* directory for the language installed (such as ENU for English):

■ finswpsales.cfg for Sales

■ finswpserv.cfg for Service

■ wpbanking.cfg for Banking and Brokerage

These server configuration files should be used to define installation-related preferences for Siebel Wireless applications such as enabling the Siebel Wireless Auto Login feature, integrating Siebel Wireless applications with directory servers, enabling Wireless support for the XML Web Interface and HTML wireless browsers.

Additionally, these configuration files can be used to perform such optional configurations as altering the number of records returned by lists in Siebel Wireless, and turning off case sensitivity for Siebel Wireless applications.

Note that the configuration changes discussed in this section must be made to each of the individual server configuration files described above for Siebel Wireless applications for which the new configuration is desired. The Siebel server must be stopped and started after these configuration changes are made to force the new configuration into effect.

Altering the Number of Records Returned by Lists

By default, Siebel Wireless applications return three records with each list. For example, the list of employees accessible from the Siebel Sales Wireless application displays the first three employees the first time it is accessed, and it displays the next three employees each time the More link is selected.

You can alter the number of records returned by lists by setting an entry in the SWE section of the relevant Wireless Server configuration file as follows:

```
[SWE]

NumberOfListRows = <Number Desired>
```

Note that some wireless browsers impose limitations on the amount of data that can be retrieved with any one request. Increasing the number of rows returned may cause the requests coming from the Siebel Server to exceed the data request size limitations imposed by these wireless browsers. Therefore, you should test the ability of the wireless browsers that will be used to access Siebel Wireless applications to handle the additional data returned from the Siebel Server once this parameter is changed to make sure that your changes do not produce a "Digest Too Large" or similar error.

Turning Off Case Sensitivity

By default, Siebel Wireless applications are set to be case-sensitive for searches. You can make Siebel Wireless applications case-insensitive when performing searches by making the following changes.

To turn off case sensitivity

1 Edit the ServerDataSrc section of the appropriate Siebel Wireless server configuration files as follows:

```
[ServerDataSrc]

CaseInsensitive   = TRUE
```

2 Log into a Web Client application with administration capabilities as the systems administrator.

3 Navigate to Site Map > Server Administration > Enterprise Configuration, then from the Enterprise Component Groups list, select Siebel Financial Services component group.

4 Click the Enterprise Component Groups tab, and select the wireless application name for which you wish to modify case sensitivity, then click the Enterprise Profile Configuration tab.

The upper list changes to Component Profiles.

5 In the Component Profiles list, in the Named Subsystem Alias column, select ServerDataSrc.

6 In the Enterprise Profile Configuration list, select DSCaseInsensitiveFlg from the Parameter Alias column.

7 In the Value column, enter TRUE.

Use capital letters, no quotes.

8 Step off of the record to save it.

9 Restart the Siebel server and the Web server.

Configuring Main Menu Layout and Record Order

You can determine which applications are available for customization by the user, and you can establish the fields available for the user to sort on. To do so, you modify the .cfg file associated with the application containing the Mobile Device screen, the screen used for customization by the user.

The user establishes preferences by means of the Main Menu Layout tab and the Record Order tab on the Mobile Devices screen in the Siebel Web client. For information about how the user establishes main menu and record order preferences, see "Personalizing Your Wireless Device" on page 72.

Cfg File Settings

The cfg file associated with the application used to set the user's preferences has the following section:

```
[Wireless:ApplicationList]

Siebel Sales Wireless      = WirelessSalesObjMgr_<language>

Siebel Service Wireless    = WirelessServiceObjMgr_<language>

Siebel PRM Wireless        = WirelesseChannelObjMgr_<language>

Siebel eService Wireless   = WirelesseServiceObjMgr_<language>
```

The actual filenames replace < language > with the three-character language code.

Configuring Record Order

Use Siebel Tools to set sort fields for all applets. Calculated fields cannot be used for sorting. Fields that can be selected for sorting in each applet are determined as follows:

1 All the list columns from *display* applets (for example, SWLS Sales Action Action display applet) are selected for sorting if they are mapped to a field and have a display name.

2 If the DetailAppletName applet user property has been set for a *display* applet (for example, SWLS Sales Action Action detail applet has been set up for SWLS Sales Action Action display applet), any control fields from the *detail* applet with a field, a name, and a caption are selected for sorting also.

3 If no fields are found in Step 2, the list columns from *detail* applets are also selected for sorting if they are mapped to a field and have a display name.

Settings Used for Record Order

In Siebel Tools, the following user properties for display applets facilitate Record Order configuration.

■ **DetailAppletName.** This user property defines a detail applet from which additional fields to sort can be listed, provided the detail applet is based on the same business component (BC) as the display applet (for example, setting SWLS Sales Action Action detail applet as the detail applet for SWLS Sales Action Action display applet).

■ **NoSortOnFields.** If this user property for a display applet is set to TRUE, the page tab represented by the display applet is removed from the list of page tabs that the user can choose from. For example, if this user property is set to TRUE for SWLS Sales Action Action display applet, the Activity page tab will be removed from the list of page tabs for the Siebel Sales Wireless application in the Record Order view.

Removing an Application

If you want to prevent a user from changing the main menu or record order for a particular application, you can remove it from the application picklist in the Main Menu Layout and Record Order lists in the Mobile Devices screen.

You can remove an application from the picklist by removing or commenting out the appropriate entry in the cfg file. For example, if you want to remove the Siebel Self-Service Wireless from the application picklist in Siebel Sales, edit the [Wireless:ApplicationList] section in the associated .cfg to contain only the following:

```
[Wireless:ApplicationList]

Siebel Sales Wireless       = WirelessSalesObjMgr_<language>

Siebel Service Wireless     = WirelessServiceObjMgr_<language>

Siebel PRM Wireless         = WirelesseChannelObjMgr_<language>
```

If you want to comment out the entry in the cfg file, precede it with a semicolon, as shown here:

```
;Siebel eService Wireless  = WirelesseServiceObjMgr_<language>
```

Configuring with Siebel Tools

Siebel Tools is a Siebel product option that allows customers to configure their Siebel eBusiness Applications.

Similar to other Siebel eBusiness applications, Siebel Wireless is defined in Siebel Tools as a series of applications, screens, views, and applets.

Unlike the more complex views of the Siebel Web Client applications, Siebel Wireless views normally contain only one applet each, and each of these applets contains only one column of data. This one-column, one-applet rule takes into account the smaller screen sizes and navigation mechanisms of mobile devices.

Some wireless devices have larger screens that can accommodate customized user interfaces with two columns. You can customize the user interface using XSL stylesheets.

Table 6 shows details of the views that can be defined in Siebel Tools.

Table 6. Siebel Tools Definitions for Financial Services Wireless

Application Name as Defined in Siebel Tools (Wireless Application)	Number of Screens Defined in Siebel Tools
Siebel FINS Sales Wireless (for the Siebel Wireless Sales application)	6
Siebel FINS Service Wireless (for the Siebel Wireless Service application)	6
Siebel Banking Wireless (for the Siebel Banking and Brokerage application)	5

The views and applets for Siebel Wireless applications are different from those defined for their Web Client counterparts, such as Siebel Sales.

Siebel Wireless applets and views generally fall into five types:

■ Detail applets and views display labels and data for a single record.

■ Display applets and views display data for multiple records.

■ Menu applets and views contain links that allow users to select different visibility levels (such as My Opportunities or All Opportunities) in the Siebel Self-Service and PRM Wireless applications.

■ Pick applets allow Siebel Wireless users to create one-to-many associations with other Siebel records (such as picking a single company from the list of companies defined in the Siebel database for an Opportunity).

■ Association applets allow Siebel Wireless users to create many-to-many associations with other Siebel records (such as picking multiple Contacts from the list of Contacts defined in the Siebel database for an Opportunity).

The names defined in Siebel Tools for the Siebel Wireless applets and views provide information as to which Siebel Wireless application they relate to, what business objects they reference, and which type of view they are. Examples of the naming convention followed by Siebel Wireless applets and views are shown in Table 7.

Table 7. Naming Convention

Product	Application	Screen Business Object	View Business Component	Type	Object
SWLS	Sales	Opportunity	Note	Detail	Applet
SWLS	Service	Company	Contact	Display	View
SWLS		Company		Association	Applet

You can use Siebel Tools to change the appearance and functionality of the base Siebel Wireless applications. For example, you can expose additional information, hide existing information, or change terminology to more closely adhere to your particular business processes. You can also create entirely new Siebel Wireless applets, views, screens, and applications using Siebel Tools.

In some cases, Siebel Wireless applications may display different visibility for an object than is available to users of Siebel eBusiness Applications. For example, the default visibility for Siebel Sales is the records in My Companies, while the default for Siebel Wireless Sales is the records in All Companies. You can change the visibility by modifying the Visibility Applet and the Visibility Applet Type for the appropriate view.

Siebel Wireless applications provide a preconfigured set of fields for each application. As you configure the views to suit your particular needs, check to be sure that they display appropriate data. You can add fields to any detail view, or you can change the fields that are displayed.

The rest of this chapter focuses on considerations to keep in mind when using Siebel Tools, including subsets of various parameters that are supported by Siebel Wireless applications. For more information on these concepts and for detailed general information on using Siebel Tools, refer to *Siebel Tools Reference*.

Supported Classes

One of the following C++ classes must be picked for the Class parameter of each Siebel Wireless applet, to manage the behavior of the applet.

Table 8 lists the supported classes for Siebel Wireless.

Table 8. Supported Classes

Class	Purpose	Comments
CSSFrmAct	Used for the Activity detail applet	
CSSFrame/CSSFrameBase	Used for detail applet	
CSSFrameCalRerouteBase	Used for the Calendar list view	Special class for Siebel Wireless Calendar
CSSFrameList/CSSFrameListBase	Used for list applet	Pick applets use the CSSFrameListBase class, and association applets use the CSSFrameList class
CSSFrameListFile	Used for Correspondence enclosure display applet	
CSSFrameListFulfillment	Used for Correspondence detail applet	
CSSFrameRerouteBase	Used for detail applet	Special reroute class for Siebel Wireless, based on CSSFrameBase

Table 8. Supported Classes

Class	Purpose	Comments
CSSFrameRerouteListBase	Used for list applet	Special reroute class for Siebel Wireless, based on CSSFrameListBase
CSSSWEFrameSrvcLocator	Used in eService service locator display applet	Special class for Service Locator

Supported HTML Types

The HTML Type specifies the style of each form control or list column for an applet, and is required for Siebel Wireless form applet controls and list columns. HTML Types supported by Siebel Wireless applications include:

■ Link

■ Label

■ Text

■ MakeCall

■ FieldLabel

Supported Methods

The Method Invoked specifies the method invoked by a form control when a button is clicked, for controls where the HTML Type is set to Link. Methods that can be referenced in the Method Invoked column for Siebel Wireless form controls are shown in Table 9.

Table 9. Supported Methods

Method	Purpose	Comments
Write record	Commit New or Edit Record	For Reroute class, use control user property: View = "View name to reroute to" (optional)
UndoRecord	Cancel new, edit or delete record	

Table 9. Supported Methods

Method	Purpose	Comments
PickRecord	Pick a record from Pick Applet	Use control user property: FieldType = "Control/List item Name" FieldName = "Field Name"
OrderAllParts	Create auto order for orderable recommended parts	
OnSubmitHTML	Submit Correspondence	
NewRecord	Open new record template to create an new record	
NewQuery	Open query template for a new search	
GotoView	Navigate from a control link to a specified view	Use control user property: View = "View name to navigate to"
GotoPrevious	Used in Calendar to go to previous set of appointments	
GotoNext	Used in Calendar to go to next set of appointments	
GotoPage	Used in Calendar to go to next set of appointments	Use control user property: Page = "Page to navigate to" Siebel Wireless applications only use SWLS Start Page (Main Menu Page)
ExecuteQuery	Execute search	
EditRecord	Open edit template to edit a field	
DeleteRecord	Delete current record	For reroute class, use control user property View = "View name to reroute to" (Optional)
CommitPartMvmtClient	Commit a service activity part tracker	

Preventing Picklists from Displaying a Blank Line

The default Siebel Wireless configuration allows the picklist of a field to display a blank line even though the field may be a Required Field. If customers wish to make the field a Required Field and keep this blank line from being displayed in the UI, the customers can add the "emptyNotOK" attribute to the HTML Attributes property in Siebel Tools.

Rerouting Users to Different Views

By default, when a user performs certain actions, the methods called by those actions return the user to the view from which the method was called. This is true for the following methods:

■ DeleteRecord

■ WriteRecord

■ EditRecord

■ NewRecord

■ ExecuteQuery

For example, when a user chooses the Submit button that calls WriteRecord, Siebel Wireless returns the user to the view on which the Submit button appeared.

You can override this behavior, returning the user to a specified view. You will use Siebel Tools to make changes for each applet.

To reroute the return view

1 In Siebel Tools, change the applet's Class property.

- ■ If the applet is a form, set the Class property to CSSFrameRerouteBase.

- ■ If the applet is a list, set the Class property to CSSFrameRerouteListBase.

2 At the Control level, create a User Property named View, and set it equal to the name of the view to which you want to return users.

Use this format: `view=view_name`

where `view_name` is the name of the view as it is named in Siebel Tools.

Detail Applet Control Layout

To accommodate the simple user interface required by wireless devices, Siebel Wireless applets do not display controls in detail views based on the applet's layout in Siebel Tools. Instead, controls are presented in order of their sequence as defined in the Applet Web Template with which the applet is associated.

Masking Passwords

The login pages of the various Siebel Wireless applications have been defined as Web Pages in Siebel Tools.

By default for these Siebel Wireless login Web pages, the Type parameter for the _SWEPassword Web Page Item is set to Text. Thus, the text of Siebel Wireless passwords is displayed on screen as users enter their passwords.

To present password characters entered by users as asterisks, change the Type parameter for the _SWEPassword Web page item to Password.

Consider the devices your users are using. Entering characters from a cell phone keyboard is more difficult than from a personal digital assistant, and most such users need the text confirmation that a particular character is the correct one.

Setting Up Currency Fields for Banking and Brokerage

The default input format for currency fields is Numeric. This configuration allows only whole currency (for example, dollars) and not fractional currency (such as cents) to be entered. This configuration is achieved by entering `format="*N"` in the HTML Attribute for the currency fields.

For Siebel Wireless Banking and Brokerage, the default input format should be changed to Character, so that users can enter fractional currency for paying bills and transferring funds. This change affects currency fields in Bills Payments and Funds Transfer views. You change the default input format to Character by deleting the HTML attribute in the field configuration.

To change default input formats to Character from Numeric

1 In Siebel Tools, in the Object Explorer, select the Applet object.

2 In the Applets window, select the appropriate wireless applet.

For example, select the SWLS Banking Funds Transfer form applet for the funds transfer function.

3 Open the Applet Control window from the Object Explorer.

4 In the appropriate control row (for example, Amount), scroll to the HTML Attributes cell.

The entry is format="*N"

5 Delete the entry and leave the cell empty.

Local Phone Numbers

HTML attributes for phone number fields should be removed for non-English versions of Siebel Wireless. This issue is applicable for all non-American English locales.

In the American English version, phone numbers are automatically formatted for users, using format masks in the form of HTML Attributes that are applied to the relevant controls in Siebel Tools. Specifically, digits are required in all places except the first.

These format masks are not localized to accommodate other phone number entry styles, which may result in undesired formatting when entering phone numbers.

The HTML Attributes affecting phone number fields should be removed by administrators to support localized versions of Siebel Wireless. See *Siebel Tools Reference* for details on modifying or removing HTML Attributes.

Configuring Template Files and XSL

Siebel Wireless applets and views are associated with a series of wireless template files contained in the siebsrvr/WEBTMPL directory that is created automatically during the installation of the Siebel Server. These templates govern the presentation of Siebel Wireless data to users and are used to create WML or XML files, depending on the browser type.

These wireless templates reference a series of XSL stylesheets, which are processed by the XSLT business service if XML is determined to be the markup language for the request. These XSL stylesheets are also contained in the siebsrvr/WEBTMPL directory, and are designed to render Siebel Wireless applications in HTML.

The new Web Browser Administration and user agent detection capabilities of Siebel eBusiness Applications are used in two ways by Siebel Wireless applications:

■ To apply tags conditionally to only certain recognized browser types. For example, this capability can be configured to apply the enhanced, proprietary tag sets offered by various wireless browsers only to those browsers that support the tags, or to improve the Siebel Wireless user interface for certain wireless browsers. These conditional tags can be applied to both WML and XML to wireless requests.

■ To apply XSL stylesheets to recognized browser types when both WML and XML browsers are being supported as described in Chapter 2, "Installing Siebel Wireless."

Designing with Templates

Siebel Wireless has its own set of templates and stylesheets. Because the screen of a mobile device is small, the templates are designed to display the information in a single column, a single applet per view.

Display items include anything that can be displayed on the screen, including controls, labels, and field values. The items are displayed on-screen based on the sequence established in Siebel Tools.

When you configure a wireless applet in Siebel Tools, you associate item identifiers with elements you want to include in the applet. The item identifiers are mapped to predefined control IDs in the template. The item identifiers and the control IDs establish the order in which the elements are displayed.

For example, the portion of a detail applet template for a field label and value looks like this:

```
<swe:for-each count=29 iteratorName="CurrentId" startValue="11">
  <!-- reserved for labels -->
  <swe:control id="swe:CurrentId+100" hintMapType="Control">
    <swe:this property="DisplayName" hintText="Label"/>
  </swe:control>
  <!-- reserved for form items -->
  <swe:control id="swe:CurrentId" hintMapType="FormItem">
    <swe:this property="FormattedHtml" hintText="FormItem"/>
  </swe:control>
</swe:for-each>
```

In this example, the control ID range from 11 to 40 (start at 11 and run 29 times) is reserved for field items. The range 111 to 140 (100 + CurrentId) is reserved for label items. In the template, the control ID for the label (CurrentId + 100) appears before the control ID for the field value (CurrentId), so a label item with control ID 111 would be displayed above a field item with control ID 11.

Using Siebel Tools, you can map a field (for example, Account Name) to 11 and the field label (for example, Account) to 111 (100 + 11). When this template is used, the label is displayed first, then the field value. You would associate other field values to 12, 13, and so forth, and associate their labels to 112, 113, and so forth.

To see the control ID ranges available for each template, review the hint text in the template. The detail applet template, for example, uses control ID 1 for the applet title with data, 100 for the applet title label, 2–10 for control items such as Search, 11–40 for field items, 111–140 for field label items, 41–50 for control items such as Main Menu link, and so forth.

The template files are used to create either a WML or XML file, depending on the browser type.

For information about how Siebel templates work, see *Siebel Tools Reference*.

Template File Overview

Because Siebel Wireless supports the smaller screen of a mobile phone or device, it uses a different set of templates than do other Siebel eBusiness Applications.

Similar to Siebel Wireless applet names and view names defined in Siebel Tools, all Siebel Wireless templates have names that start with SWLS. As with other Siebel Web Template files, these wireless template files each end with the .swt suffix.

NOTE: Any wireless templates that an administrator may create in addition to the templates that exist in Siebel Tools do not have to have a name that starts with SWLS, but following this convention will help you distinguish the wireless templates from others used for Siebel Web Client applications.

The wireless templates are located in the same directory as all other Siebel Web-based templates (siebsrvr/WEBTMPL). They can be edited in any standard text editor. They include the templates shown in Table 10.

Table 10. Descriptions of the Wireless Templates

Template Filename	Description
SWLSLogin.swt	Login page
SWLSStart.swt	Main Menu page
SWLSListView.swt	Base view containing applets
SWLSListApplet.swt	Display page

Table 10. Descriptions of the Wireless Templates

Template Filename	Description
SWLSDetailApplet.swt	Detail page
SWLSEdit.swt	Edit, search, update, and data submit page
SWLSError.swt	Error display page
SWLSPickApplet.swt	Pick applet page
SWLSAssocApplet.swt	Association applet page
SWLS*Splash.swt	Application welcome page
SWLSPopupEdit.swt	Edit page within pick applet or association applet
SWLSMakeCall.swt	Enable the Make Call feature from Menu soft key in Openwave browsers
SWLSCalendarListApplet.swt	Calendar display page
SWLSLogoffAck.swt	Logoff display page

XML Web Interface and HTML Browser Support

The HTML version of Siebel Wireless is generated using the Siebel XML Web Interface (sXML), XSL stylesheets and the XSLT business service. The Siebel Web Engine's sXML interface renders Siebel Wireless views and applets in XML.

XSL stylesheets are assigned to the Siebel Web Templates using the swe:xsl-stylesheet tag and are located in the Web template directory. See "XSL Stylesheet File Overview" on page 52 for more details on Web templates and XSL stylesheets associated with Siebel Wireless applications.

The resulting XML documents are passed to the XSLT business service, which processes the XML using a referenced XSL stylesheet.

Siebel Wireless has been enabled to support both HTML and XML requests through the Siebel Web Engine for the following reasons:

■ There has been a proliferation of wireless devices with HTML browsers or a variant of HTML browsers.

■ There has been a proliferation of wireless transcoding servers or publishing engines that can take XML data feeds and publish or render content to a myriad of devices.

XSL Stylesheet File Overview

In addition to the wireless templates, the siebsrvr/WEBTMPL directory also contains a series of XSL stylesheets used to render Siebel Wireless requests in HTML through the Siebel XML Web Interface. These XSL stylesheets are applied to wireless requests which have been identified to be XML requests, through the process described in Chapter 2, "Installing Siebel Wireless."

The XSL stylesheets also have names that begin with SWLS, and each stylesheet ends with the suffix .xsl. Like the wireless template files, these XSL stylesheets can be edited using any standard text editor. Table 11 shows the XSL stylesheet files.

Table 11. XSL Stylesheets Descriptions

Template Filename	Description
SWLSLogin.xsl	Login page
SWLSMain.xsl	Main Menu page
SWLSListApplet.xsl	Display page
SWLSDetailApplet.xsl	Detail page
SWLSEdit.xsl	Edit, search, update, and data submit page
SWLSError.xsl	Error display page
SWLSPickApplet.xsl	Pick applet page
SWLSAssociationApplet.xsl	Association applet page

Particular XSL stylesheets are referenced in wireless template files using the swe:xsl-stylesheet tag. For example:

```
<swe:xsl-stylesheet name=SWLSLogin.xsl mode=process/>
```

Including this tag in a wireless template file results in the SWLSLogin.xsl stylesheet being applied to all Siebel Wireless applets and views that are associated with that template, assuming that the XML Web Interface is used to handle the request. Conditional tags can be used to apply variant XSL stylesheets (for example, for other markup languages such as cHTML), if these additional XSL stylesheets are maintained within the Siebel software.

Managing Browser Types

Web Browser Administration allows users to define capabilities and user agents for certain Web browsers which can be acted on using conditional logic within Siebel Web Template files.

Siebel Wireless applications can take advantage of the Web browser administration and conditional logic capabilities of Siebel eBusiness Applications to apply tags or other template-based functionality only to certain recognized browser user agents in the Siebel Wireless template files.

See *Siebel Tools Reference* for more information on the logical structure and naming conventions used to apply conditional tags within Siebel Web Template files.

An example of how such conditional tags are applied to Siebel Wireless applications is provided in the following section.

Optimizing the Main Menu for a Particular WML Browser Type

The following example of applying particular WML tags to recognized wireless browsers shows how to:

■ Provide an Exit link on the main menu for Openwave wireless 3.x browsers that do not support an Exit soft key. The Exit link allow users to log out of Siebel Wireless applications using these browsers.

■ Present the Main Menu as an Options List for all Phone.com browsers in the Phone.com /3.x Browser Group (including those with the UP.Browser/3. user agent). Here, displaying the main menu as an options list allows main menu items to be selected using the numbers on a phone's keypad.

NOTE: The following configuration has already been performed in the seed data provided with Siebel applications. This example is provided to demonstrate the approach required to make similar modifications for Openwave or other WML browser types.

Create an entry for the Phone.com/3.x browser using the Server Administration > Web Browser Administration capability of the Siebel Web Client. Table 12 shows the appropriate values.

Table 12. Phone.com/3.x Browser

Capability Name	Capability Value
Browser	UP Browser
SelectOption	TRUE

Create another entry in Web Browser Administration entitled UPBrowser 3.x to define the particular user agent to which the Exit link will be applied. Table 13 shows the values to define.

Table 13. UPBrowser 3.x

Capability Name	Capability Value
DefaultMarkup	WML
User-Agent	UP.Browser/3.
Parent	Phone.com/3.x
SoftKeySupport	FALSE

Open the SWLSeChannelSplash.swt, SWLSeServiceSplash.swt, SWLSSalesSplash.swt, SWLSServiceSplash.swt, and SWLSStart.swt Siebel Web Template files (they reside in the siebsrvr/WEBTEMPL directory defined during the installation of the Siebel Server). These Siebel Web Template files are used to render the main menu of Siebel Wireless applications, to which the Exit link and options list tag will be conditionally applied.

Text required to provide the Exit soft key only for browsers for which the SoftKeySupport capability has not been set to FALSE:

```
<swe:switch>
<swe:case condition="Web Engine User Agent, TestCapability,
'SoftKeySupport:FALSE'">
</swe:case>
<swe:default>
<swe:exitsoftkey property="Softkey" />
</swe:default>
</swe:switch>
```

Text required to display the main menu as an options list only for browsers for which the SelectOption capability has been set to TRUE:

```
<!-- Screen Bar -->
<swe:switch>

<swe:case condition="Web Engine User Agent, TestCapability,
'SelectOption:TRUE'">
<select>
<swe:for-each-screen>
<swe:screenoptionlink>
<swe:screenname/>
</swe:screenoptionlink>
</swe:for-each-screen>
```

Text required to add an Exit link on the option list for browsers for which the SoftKeySupport capability has been set to FALSE and the SelectOption capability has been set to TRUE:

```
<swe:if condition="Web Engine User Agent, TestCapability,
'SoftKeySupport:FALSE'">
<swe:exitsoftkey property="Optionlink" />
</swe:if>
</select>
</swe:case>
<swe:default>
```

```
<br/>
<swe:for-each-screen>
<b><swe:screenlink><swe:screenname/></swe:screenlink></b><br/>
</swe:for-each-screen>
```

Text required to add an Exit link for browsers for which SoftKeySupport capability has been set to FALSE, and the SelectOption capability has not been set to TRUE:

```
<swe:if condition="Web Engine User Agent, TestCapability,
'SoftKeySupport:FALSE'">
<b><swe:exitsoftkey property="Link" /></b>
</swe:if>
</swe:default>

</swe:switch>
```

Supporting Wireless Requests with Multiple Markup Languages

If your users are using different browsers, you may need to configure Siebel Wireless applications to handle multiple markup languages. Siebel Wireless applications can be configured to handle all wireless requests through the XML Web Interface, or to handle only certain wireless requests through the XML Web Interface and to handle others through the WML Interface.

To make sure that Wireless requests are handled as desired, first determine whether Siebel software will need to support:

■ Requests from WML browsers only

■ Requests from both WML and non-WML browsers

■ Requests from only non-WML browsers

If Siebel Wireless will need to handle requests for WML browsers only or for both WML and non-WML browsers (the first two cases above), the following configuration must be performed.

To configure for WML and non-WML browsers

1 Make sure that the MarkupLanguage parameter in the SWE section of relevant Siebel Wireless server configuration files is set as follows:

```
[SWE]

MarkupLanguage=WML
```

NOTE: WML is the default value for this parameter when Siebel software is installed.

2 Create the following Web Browser entries using the Web Browser Administration screen in the Siebel Web Client for each wireless browser for which requests will be handled by the XML Web Interface:

■ Define a Browser Group entry with capabilities as follows:

Capability Name	Capability Value
Browser	< Browser Name >
DefaultMarkup	XML

■ Define child browsers with capabilities as follows:

Capability Name	Capability Value
Default Markup	XML
User-Agent	< Browser User Agent >
Parent	< Browser Name Defined Above >

3 Create the following Web browser entries using the Web Browser Administration capability in the Siebel Web Client for each wireless browser for which requests will be handled by the WML Interface:

■ Define a Browser Group entry with capabilities as follows:

Capability Name	Capability Value
Browser	< Browser Name >
Default Markup	WML

■ Define child browsers with capabilities as follows:

Capability Name	Capability Value
Default Markup	WML
User-Agent	< Browser User Agent >
Parent	< Browser Name Defined Above >

User agents must be defined for both WML and non-WML browsers to make sure that the correct interface is applied.

If MarkupLanguage is set to WML as described above, any wireless request for which no user agent is recognized is treated as an XML request. Additionally, any wireless request from a user agent which has HTML defined as its default markup is treated as an XML request.

See *Siebel Web Client Administration Guide* for additional details on defining Web browsers and user agents using Web Browser Administration.

If Siebel Wireless will need to handle requests only through the XML Web Interface, the following configuration must be performed:

■ Make sure that the MarkupLanguage parameter in the SWE section of relevant Siebel Wireless server configuration files is set as follows:

```
[SWE]

MarkupLanguage=XML
```

NOTE: If the MarkupLanguage parameter is set to XML for a particular Siebel Wireless application, the XML Web Interface is used to handle all wireless requests from all browsers regardless of the DefaultMarkup value defined for their user agent.

This process of determining a markup language for a particular request described above can be overridden by setting the SWESetMarkup parameter for inbound wireless requests. Valid values for this SWESetMarkup parameter are XML or HTML (not WML).

For example, this parameter can be set as follows to force a particular wireless request to be rendered in XML, regardless of the MarkupLanguage defined in the wireless configuration file or the DefaultMarkup defined for that browser:

```
SWESetMarkup="XML"
```

Configuring Predefined Queries (PDQs)

Predefined Queries (PDQs) are a normal query mechanism of the Web client. They are presented in Siebel Wireless in a limited fashion—that is, they are not present in the Wireless UI, so users are not able to select from various PDQs as they would on the Web client.

There is a PDQ that is applied to each Business Component for Wireless. The PDQ is named SWLS and is configured to be the default PDQ for Wireless views by means of the User Preferences screens in the Web client. If users want to change the SWLS PDQ from the default query of (All Records), they can do so in the normal PDQ screens for a business object.

For additional information about PDQs, see *Applications Administration Guide* and *Fundamentals*.

Using Siebel Wireless 4

This chapter details usage scenarios for Siebel Wireless.

Using the Mobile Device

The following actions can be accomplished in Siebel Wireless by pressing input keys on the wireless device or, in the case of some wireless handheld devices, touching links on the screen itself:

■ Drill down or follow a hyperlink

■ Invoke a command (such as Submit or Service Order All) through a hyperlink

■ Move from item to item on the screen

■ Select an item from a picklist

■ Enter text or numerical values

■ Edit values

The exact keys you use for various actions depends on the wireless device. The following sections explain some of the most common keys for interacting with the application.

Scroll Keys

Siebel Wireless displays labels and data in a single column to eliminate the need for horizontal scrolling. Vertical scrolling may be necessary when using Siebel Wireless, as views can contain more data than can be displayed vertically on the mobile device's screen.

All wireless browser-enabled devices have mechanisms to scroll up and down the screen. Often this mechanism is a pair of *scroll keys* (sometimes called navigation keys by some manufacturers). On phones, these keys are usually located just below the center of the screen: they are used to move up and down through the items on the screen.

Other devices have just a single scroll key with two or four arrows (depending on whether the device allows horizontal scrolling as well).

On some devices, a *scroll dial* serves this function. Turning the dial moves the selection point up or down the screen. Pressing the dial selects the current item.

With other devices, you tap on the appropriate button on the screen to navigate vertically within an application.

For details about how to move from item to item on a particular device, see the device's instruction manual.

Soft Keys

Wireless browser-enabled devices often provide *soft keys* or buttons that represent commands that change depending on which application the browser is accessing and what part of the application is active.

Usually located at the bottom of the screen, soft keys are the primary way of interacting with the application. Their exact functions change from screen to screen; the current function of each soft key is indicated in text that appears onscreen.

Examples of soft keys that may appear in Siebel Wireless, depending on the capabilities of the wireless browser, include:

■ OK or Link, which allows users to select links

■ Exit, which allows users to log out of the Siebel Wireless applications

■ Menu or Options, which in some cases allows users to navigate to a list of phone numbers displayed in a view and link on one of these phone numbers to place a call. Note that this functionality must be supported by both the wireless browser and mobile device you are using to access Siebel Wireless.

You can also use additional soft keys to access functionality provided by the wireless browser or the device itself, such as returning to the browser's home menu or viewing the browser's help. These soft keys may be displayed when accessing Siebel Wireless applications, although they are not used by Siebel Wireless itself.

For details on the type and functionality of particular soft keys provided by a device and wireless browsers, see the device's instruction manual.

Connecting and Logging In

To start using Siebel Wireless, connect to the Siebel Server and log in using your standard Siebel user name and password.

These steps assume that Siebel Wireless has been configured to require users to enter both a User ID and Password to log in. If the Auto Login feature has been enabled, Siebel Wireless users may be required to enter only a password to log in, or instead to enter no login information at all.

To connect to the Siebel Server and log in

1 Enter the URL for Siebel Wireless into the device's browser.

   You can get this URL from your Siebel administrator, the person who set up Siebel Wireless for your enterprise. If your device allows it, you can create a bookmark for this URL for future use.

2 When prompted for a User ID, enter your standard Siebel user name.

3 Use the browser's soft key to choose OK.

4 If necessary, scroll down to the Password field.

5 When prompted for a password, enter your regular Siebel password.

   NOTE: Password entry may be case sensitive. For information about switching between lowercase and uppercase letters, see the manual for the device.

6 Use the browser's soft key to choose OK.

7 Choose the Submit link.

If login is successful, the name and main menu of the appropriate Siebel Wireless application appear.

After you log in, the session is maintained with Siebel Wireless until you log off or until the Siebel Server or the wireless server terminates the session. (The wireless server is configured by the mobile operator or by the administrator.) An incoming or outgoing phone call or loss of coverage should not terminate the Siebel Wireless session.

NOTE: Different carriers adhere to different session management rules. For example, with one carrier, users logging in automatically return to the end of their previous session, whereas with another carrier users are returned to the main menu regardless of where they left off in their previous session. Contact your carrier or IT department for more information.

Logging Off

When you are finished with a Siebel Wireless session, you need to log off. Logging off prevents unauthorized users from accessing Siebel data from the device.

Depending on the type of wireless device you have, logging off closes the Siebel session but keeps an Internet connection active, whereas simply turning off the device terminates both the session and the Internet connection.

To log off from a Siebel Wireless session

1 Return to the Main Menu screen.

You can get to the Main Menu by choosing the Main Menu link.

2 Scroll down to the bottom of the screen and choose Exit. Depending on the wireless browser you are using, the Exit command may be presented as either a soft key or a link.

Entering Text

You enter text into Siebel Wireless as you normally do on the mobile device, with a few exceptions. This section lists these exceptions and includes additional tips for entering data.

General Tips

■ If the mobile device has separate modes for digits and letters, be sure you are in the right mode at the right time, depending on the kind of data you are entering.

■ On many mobile devices, you enter letters by pressing the appropriate key on the keypad. Some devices offer full 26-key keypads; others require users to press a single key multiple times to enter a letter.

■ Other mobile devices offer Graffiti, Tegic, or other text entry mechanisms to enter text into Siebel Wireless applications.

Capitalization

■ By default, all Siebel software (including Siebel Wireless) is case sensitive, though your system administrator may have overridden this default. If you are not careful about entering the correct case, you will experience mismatches between text you enter (such as a search string or your password) and the values stored in the Siebel database. For example, if your password is OpenSesame and you enter opensesame, you will not be able to log in if case sensitivity is turned on. Similarly if case sensitivity is activated, if you search for acme, you will not find Acme or ACME.

Consult with your systems administrator to determine whether the Siebel Wireless applications have been configured to be case-sensitive.

■ Some mobile devices automatically capitalize the first letter of each word you enter. Therefore, if you are using such a device and intend a word to be lowercase, you must correct the case. For more information, see the owner's manual for the device.

Clearing Text

If you make a mistake and want to delete a character, use the clear command provided by the mobile device and browser. For example, the right soft key may work like a backspace key, deleting the character before the cursor.

Entering Dates

The screen label indicates how to enter dates. For American English versions, for example:

■ When entering a date, use the MMDDYY format.

■ Slashes are inserted automatically as you enter text when using some wireless browsers. For example, to specify April 18, 2000, enter 041800 and you will see 04/18/00 on the screen. These slashes are generally not required to enter data into Siebel Wireless.

■ You must use all six digits of the MMDDYY format. For example, entering 3/5/73 (rather than 03/05/73 or 030573) produces an error.

Entering Times

The screen label indicates how to enter times. For American English versions, for example:

■ When entering a time, use the hh:mm A format (where the final A represents A.M., and P represents P.M.).

■ Colons are inserted automatically as you enter text when using some wireless browsers. For example, to specify 8 o'clock A.M., enter 0800A and you will see 08:00 AM on the screen.

■ You must leave a space between the time and the A (A.M.) or the P (P.M.).

Entering Phone Numbers

The screen label indicates how to enter phone numbers. When entering a phone number, do not enter any dashes and parentheses. Siebel Wireless automatically inserts these symbols.

■ For U.S. and Canadian phone numbers, you must use at least 10 digits (an area code followed by the phone number). Siebel Wireless treats extra digits as an extension. For example, if you enter 51055512004567, x4567 would appear after 510-555-1200.

■ For phone numbers outside the US and Canada, precede the number with a plus sign (+). The first digit of the phone number entry fields is alphanumeric by default to allow users to enter the + sign if required. Other digits allow for numeric input where supported by wireless browsers.

Entering Currency

When entering currency, Siebel Wireless allows you to enter only numbers. Symbols (such as $), commas, and decimals are automatically added, based on the settings configured for the Siebel Server. In its default configuration, Siebel Wireless allows only whole currency (for example, dollars) and not fractional currency (such as cents) to be entered, except for Banking and Brokerage (see "Entering Currency in Banking and Brokerage").

Entering Currency in Banking and Brokerage

You can enter fractional currency data into currency fields in Siebel Wireless Banking and Brokerage. For example, you can enter dollars and cents into the Amount fields for paying bills and transferring funds. You must switch from Characters to Numbers each time you enter currency values on the wireless device.

Currency symbols and commas are accepted when you enter the amount, but they are not displayed after the value is entered. A decimal point is required for fractional currency values, and it is displayed after the value is entered. If you mistakenly enter an alphabetic character between two digits in the number, an error message appears on the device with instructions for changing the entry. Alphabetic characters before or after a number are ignored.

If you encounter difficulty with fractional currency, contact your systems administrator to verify that the field is properly configured.

Primary Contacts and Accounts

Using the wireless application, the first account added to a new contact (or the first contact added to a new account) is set to Primary. If a contact or an account has already been designated as Primary, a new contact or account is not Primary. You can change these designations using the Web client, but not using the wireless device.

Searching

To find items in Siebel Wireless, you need to enter a search string in one or more fields.

Each search string can be one of the following:

- **An exact field value.** For example, if you are searching for contacts with the last name "Andrews," enter the string "Andrews" in the last name field.

- **The start of a field value.** For example, to search for contacts with last names starting with A, enter A in the last name field.

  Siebel Wireless automatically assumes a wildcard (*) at the end of the search string to represent 0 or more characters—though not at the end of a date string.

- **Any part of a field value.** You can enter a search string containing as many wildcards as you want. For example, if you remember that an account has the words Home and Store in the name but are not sure of the whole name, enter *Home*Store* in the account field to find all accounts containing this pattern. This pattern would match all of the following values:

  - HomeStore

  - AtHomeStore

  - HomeToStore

  - HomeToStore, Inc.

Multifield Search

Siebel Wireless allows you to search for the information you need using multiple fields. For example, you can search for a contact by both first and last name. You are not required to enter search criteria for each available search field. If you leave a field blank, no criteria are considered for that field in the search.

The following procedure is an example of how to use multifield search from the Contacts display view.

To use multifield search from the Contact display view

1 Select the Search link on the Contact display view.

2 Enter search criteria for Last Name, if desired.

3 Click the OK soft key, if required, and enter any desired search criteria for First Name.

4 Submit the search by selecting the submit link.

The Contact display view displays contacts with names meeting the search criteria you entered.

Personalizing Your Wireless Device

Using the Mobile screen available with many Siebel eBusiness applications, you can personalize your interaction with Siebel Wireless applications and manage your wireless devices and wireless messaging addresses.

You can customize your Siebel Wireless main menu by choosing the main menu links available when you access Siebel Wireless using an Openwave wireless browser, the order in which those links appear, and the order in which data is sorted once you access the data.

The Mobile screen is accessible from the Siebel Call Center, Siebel Service, Siebel Sales, and Siebel PRM Partner Portal applications. The Siebel Web client's online help has information that helps guide you through device registration, personalization, and navigation techniques for Siebel Wireless applications.

You can access the Mobile screen on a desktop or laptop when it is connected to a Siebel eBusiness application through a network or dial-up connection.

NOTE: The Mobile screen can be used only with the zero-footprint client. However, the Mobile screen also appears in the site map of the disconnected mobile Web client. If you try to access the Mobile screen on a disconnected mobile Web client, you will see the following message: "This feature is not supported in the stand-alone Web client."

To personalize your wireless device

1 From the application-level menu, choose View > Site Map > Mobile.

2 Select the mobile device you want to work with in the Mobile Devices list, or, if necessary, create a new mobile device record.

3 Use the Mobile Devices, Main Menu Layout, and Record Order tabs to establish the configuration of the selected device.

Details for working with each of the Mobile screen tabs for Siebel Wireless applications are provided in the following sections. The Message Delivery and Mobile Alerts tabs are used for Wireless Messaging. For information about Siebel Wireless Messaging, see *Siebel Communications Server Administration Guide*.

Mobile Devices

The Mobile Devices list allows you to register your mobile devices, set the login preference, and establish the device priority. The Mobile Devices list contains the following fields:

■ **Device Name.** Enter any name you would like for the device here. For example, John's Nokia cell phone. Device names must be unique.

■ **Login Preference.** Allows you to select a login preference when you access Siebel Wireless using a wireless device with an Openwave browser.

You are required to fully authenticate with the Siebel Server the first time you access Siebel Wireless with a particular device, at which time an entry will be created for this device in the Mobile Devices list. After the initial login, the value you select for Login Preference takes effect for this device in subsequent logins.

Select one of the three choices in the login preference drop-down list:

■ Automatic Login. Opens the Wireless Main Menu directly, without having to enter the user name and password.

■ Password Only. Automatically enters your Siebel user name, requiring you to enter only your Siebel password to log into Siebel Wireless.

■ Username and Password. Requires you to enter both your Siebel user name and password to log into Siebel Wireless.

■ **Device Priority.** You must select a priority for each wireless device that you register.

To guarantee message delivery, you must be sure that only one registered device is assigned the highest device priority. If any device is assigned priority of 6 - Unranked, you cannot register another device from the Mobile Screen.

Message Delivery

The Message Delivery list allows you to enter wireless address information for each of your mobile devices. This information is used for enabling login preference and personalizing your mobile device. You can automatically register mobile devices from the Siebel Web client through this screen. For more information, see "The Auto Registration Process" on page 26.

This information is also used by Siebel Wireless Messaging. For information about Siebel Wireless Messaging, see *Siebel Communications Server Administration Guide.*

Mobile Alerts

The Mobile Alerts list lets you select which types of Workflow-driven wireless message alerts you would like to receive on your device. This information is used by Siebel Wireless Messaging. For information about Siebel Wireless Messaging, see *Siebel Communications Server Administration Guide.*

Main Menu Layout

The Main Menu Layout form lets you personalize the main menu that is displayed when you access a Siebel Wireless application using an Openwave browser. You choose the links you want to appear on the main menu and in what order they should appear. To personalize your main menu, use the following fields:

■ **Application.** To begin setting your main menu preferences, select the Siebel Wireless Application you use. For example, if you are using Siebel Wireless as a field service representative, select Siebel Service Wireless.

■ **Selected Main Menu Links.** This field displays the current configuration of the main menu for the application that you selected. To remove a link, highlight the item and click the left arrow to move the item from the Selected Main Menu Links field to the Available Main Menu Links field.

You can change the order (from top to bottom) of the main menu links. To move a selected main menu link one step up or down, highlight the item and click the up or down arrow. To move the main menu link directly to the top or bottom, highlight the item and click the underscored up or down arrows.

- **Available Main Menu Links.** This field contains the main menu items that were removed from the Selected Main Menu Links field. To move a main menu link from the Available Main Menu Links field to the Selected Main Menu Links field, highlight the link and click the right arrow to move the link.

- **Save or Reset.** When you have finished personalizing your Siebel Wireless main menu, click Save to keep the changes or click Reset to return to the default settings.

   The changed main menu settings take effect after you have stepped off the current record.

Record Order

The Record Order form lets you establish the sort order of data displayed for each of the main menu links. To change the sort order, use the following fields:

- **Applications.** Select the Siebel Wireless application for which you want to define sorting. For example, if you are using Siebel Wireless as a field service engineer, select Siebel Service Wireless.

   NOTE: The application names in the Applications drop-down list can be configured by your system administrator. If your company has changed the names of the applications in the drop-down list, select the name of the Siebel Wireless application you use.

- **Main Menu Links.** Select one of the main menu links from the drop-down list. The selection you make in this box determines what is displayed in the Fields box. For example, if you select the Activity link, the activity fields become available in the Fields box.

- **Fields.** Select the field you want to use for sorting records. For example, to sort activities by Activity Status, select the Activity Status field.

- **Sort Order.** Select Ascending or Descending for the selected field to determine the sort order of the records.

■ **Save or Reset.** When you have finished personalizing the sort orders, click Save to keep the changes or click Reset to return to the default settings.

The changed sort order settings take effect after you have stepped off the current record.

Screens and Views

Siebel Wireless allows you to view a subset of all the information available in Siebel eBusiness Applications.

Siebel applications views have been simplified to fit on the device's small screen. Because of the small screen and the lack of a typing keyboard, the displayed information and the data entry options have been reduced to the information you will need to access when you are mobile. In general, Siebel Wireless views follow these rules:

■ The titles for views are in uppercase letters.

■ All labels are followed by colons.

■ A label that is underlined (or in brackets, depending on the wireless browser you are using) allows you to drill down to edit the value for that label.

■ Data is separated from navigation links by a series of four dashes: - - - -.

■ Data is not followed by colons.

■ Data that is underlined (or in brackets, depending on the wireless browser you are using) allows you to select the data (in the case of pick and association applets) or takes you to a detail view for that data.

The screens and views that you have access to depend on the responsibility you have been assigned and the application you are using.

Screens and Views

Using Wireless Banking and Brokerage   5

The Siebel Wireless Banking and Brokerage application provides your customers with real-time access to their financial data and services, by means of an Internet-enabled wireless device.

The data displayed on the screen is the same data that is displayed on a client workstation such as Siebel eFinance. Using the standard functionality supplied with the application, your customer can view account and portfolio information, transfer funds, track the status of any particular loan or policy application, and pay bills from the wireless device.

The application can be customized for your customers using Siebel Tools.

The screens available in Siebel Wireless Banking and Brokerage are:

- Accounts

- Funds Transfer

- Portfolio

- Applications

- Pay Bills

This chapter provides basic information about each of these views.

Main Menu

When you complete the login process, the application displays the Banking and Brokerage Main Menu.

Figure 2 shows an example of the Main Menu.

```
SIEBEL MAIN
1▶Accounts
2 Funds Transfer
3 Portfolio
4 Applications
5 Pay Bills
_____
OK              EXIT
```
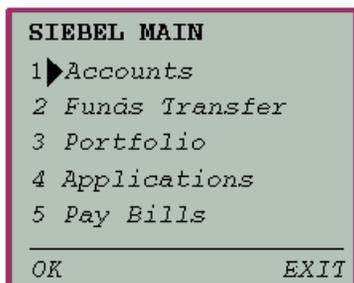
Figure 2.   The Banking and Brokerage Main Menu

The screens shown in this document may or may not reflect the actual screens on a particular device. In many cases, the particular device your customer is using will have a different convention for showing links, for indicating a soft key for linking to another screen or to Siebel data, or for some other feature.

For example, some devices use [square brackets] to indicate linking screen entries (field names, field data, links); other devices use underlines to show the same functionality. Similarly, some devices use OK as the name of the soft key that activates a selected action. Other devices use different soft key names.

Accounts

Use the Accounts view as a gateway to see the account balance and account transaction information, or to create a new account transfer.

When you select Accounts from the Main Menu, your device displays the Accounts view.

The Accounts view displays the account number, name, and current balance of the first few of your accounts. The actual number of accounts displayed depends on the configuration settings.

You can drill down on the account number to see details about any account displayed on the screen.

To display account details

1 Scroll to the account for which you want to see details.

2 Press the soft key to link to the selected account.

   The Account view opens and displays details for the selected account.

Accounts Links

Scroll down past the accounts displayed, and you see the links available in the Accounts view. These links provide access to other features or records.

■ **More.** Displays the next group of accounts.

■ **Main Menu.** Displays the Main Menu.

Working with Accounts Details

When you drill down on an account, the Account view displays the details about the selected account. Table 14 shows the fields that are displayed on the Account view.

Table 14.   Account Details

Field	Contains
Account Number	Account number for the account.
Current Balance	Current balance in the account.
Available Balance	Amount available in the account.
Rate	Interest rate, if applicable.

Account Detail Links

Scroll down past the account detail information, and you see the links available in the Account view. These links provide access to other features or records concerning the current account.

■ **Funds Transfer.** Displays the Funds Transfer view.

■ **Transactions.** Displays transactions against this account, such as deposits and withdrawals. Each transaction record includes the date, transaction type, item number, and the amount.

■ **Main Menu.** Displays the main menu.

Funds Transfer

Use the Funds Transfer function to move funds from one account to another.

When you select Accounts from the Main Menu, your device displays the Funds Transfer view.

The Funds Transfer view is the starting point for each new transfer.

To transfer funds from one account to another

1 On the Funds Transfer view, select the New Transfer link.

2 Select the From account.

3 Select the To account.

4 Enter the amount.

5 Click OK.

The Confirm view appears. Here you check the transaction details. You can change the From account, the To account, and the amount before you complete the transfer.

6 Click Submit.

The Submission view displays a reference number for your records. For details, see the note that follows.

NOTE: Clicking Submit, as in step 6, causes a Service Request record to be created with the funds transfer instructions. The confirmation number identifies the service request number (SR#). This service request number can be used to look up the record in the Service screen in Siebel eFinance or in the Customer Service screen of Siebel eBanking and Siebel eBrokerage.

Funds Transfer Links

On many of the transfer views you can cancel the transfer and return to the Funds Transfer view. Once the transfer is completed, you are returned to the main menu.

■ **Cancel.** Cancels the transfer.

■ **Main Menu.** Displays the main menu.

Portfolio

Use the Portfolio view as a gateway to see holdings in each of your investment accounts, and to display detail information about those holdings.

When you select Portfolio from the Main Menu, your device displays the Portfolio view.

The Portfolio view displays the portfolio number, description, and current balance of the first few of your portfolios. The actual number of portfolios displayed depends on the configuration settings.

You can drill down to see the holdings in each portfolio displayed on the screen, and to see details about each of the holdings.

To display portfolio holdings and details

1 Scroll to the portfolio for which you want to see details.

2 Use the soft key to drill down.

The Holdings view opens and displays the security symbol and current value for each of the holdings in the selected portfolio.

3 Scroll to the security for which you want to see details.

4 Use the soft key to drill down.

The Detail view opens and displays the security name, the current price, the quantity, the amount (current value of the holding), and the category.

Portfolio Links

Scroll down past the portfolios displayed on the Portfolios view, and you see the links available in the Portfolios view. These links provide access to other features or records.

- **More.** Displays the next group of portfolios.

- **Main Menu.** Displays the Main Menu.

Working with Holdings Details

When you drill down on a particular holding, the Detail view displays the details about the selected holding. Table 15 shows the fields that are displayed on the Detail view.

Table 15.   Holdings Details

Field	Contains
Security Name	The name of the holding.
Price	The current market price of the security.
Quantity	The number of shares (or other units) in the portfolio.
Amount	The value of the shares, equal to price multiplied by quantity.
Category	The type of investment, such as common stock, money market account, and so forth.

Information related to securities, such as the security name, the price, and the category can be set in the Siebel eFinance Securities screen. Information related to a specific investment account and holding can be set in the Siebel eFinance Financial Accounts screen.

Holdings Detail Links

Scroll down past the holding detail information, and you see the links available in the Detail view. These links provide access to other features.

■ **Accounts.** Displays the Portfolio view which lists all investment accounts.

■ **Main Menu.** Displays the main menu.

Applications

Use the Applications view to see information about current applications for loans, credit cards, and so forth.

When you select Applications from the main menu, your device displays the Applications view.

The Applications view displays the application title, product name, and stage of the first few of your applications-in-progress. The actual number of applications displayed depends on the configuration settings.

Applications Links

Scroll down past the applications displayed, and you see the links available in the Applications view. These links provide access to other features or records.

- **More.** Displays the next group of applications.

- **Main Menu.** Displays the Main Menu.

Pay Bills

Use the Pay Bills function to send funds from one of your accounts to a payee. Payees must be established in the account.

When you select Pay Bills from the Main Menu, your device displays the Pay Bills view.

The Pay Bills view is the starting point for a one-time bill payment. You can also use the Pay Bills view to view scheduled payments.

Paying a Bill

You can pay a bill to any payee that has been established in the database. Establishing a payee is a separate process and must be completed before a bill can be paid from the wireless device. You can establish a payee using the Bill Payment view in Siebel eFinance Contacts or the Bill Pay view in Siebel eBanking and Siebel eBrokerage.

To pay a bill

1 On the Pay Bills view, select the New Payment link.

2 Select a payee.

3 Select the account from which to pay the funds (the From Account).

4 Enter the amount.

You must use whole dollars.

5 Enter the due date.

For convenience, the current date is displayed.

6 Select Submit.

The Confirm view appears. Here you check the transaction details. You can change the Payee, the From Account, the Amount, and the Due Date.

7 Select Submit.

The Submission view displays a reference number for your records.

The amount you specified is sent to be processed by the financial institution.

Seeing a Scheduled Bill Payment

You can see the set of regularly scheduled bill payments you have established.

To see a scheduled bill payment

1 On the Pay Bills view, select the Scheduled link.

The Scheduled view displays the list of scheduled payments established for your accounts.

2 Select a payee.

The detail view for the selected payee displays the payee name, the amount, date of the payment, the account from which the payment is made, the frequency, and the SR # (Service Request Number).

Usage Scenario for Siebel Wireless Banking and Brokerage

This scenario gives detailed instructions for tasks your customer might commonly perform with Siebel Wireless Banking and Brokerage:

■ Review Account Balances

■ Create and Review Bill Payments

■ Create and Review Funds Transfers

NOTE: The commands required to link and submit changes may vary slightly from browser to browser for these scenarios.

This scenario is based on a customer who is registered for online banking and has existing accounts and transactions with the financial institution.

To review account balances and transactions

1 From the Main Menu, select Accounts.

The Accounts list appears.

2 Select an Account link.

The Account balance information appears.

3 Scroll down to Transactions and select Transactions.

The Transactions view appears.

4 Scroll down to see the transaction details.

To review application status

1 From the Main Menu, select Applications.

The Applications view appears.

2 Scroll down to view the application details.

3 To see additional applications, select More.

To transfer funds from one account to another

1 From the Main Menu, select Funds Transfer.

The Funds Transfer Menu appears.

2 Select New Transfer.

3 Select the Account to Transfer From.

4 Select the Account to Transfer To.

5 Enter Amount to Transfer.

6 Select OK.

The Confirm page appears.

7 Scroll down to review your transfer request.

8 To modify the transaction, select any of the From, To, or Amount fields.

9 Select Submit to enter your Funds Transfer request.

The Submission page appears with a reference number.

To create a new bill payment

1 From the Main Menu, select Pay Bills.

The Pay Bills menu appears.

2 Select New Payment.

The Payee menu appears.

3 Select a Payee.

The From Account page appears.

4 Select the account from which you want to make the payment.

5 Enter the amount of the payment.

The Due Date view appears with the current date.

6 Enter the date of the payment and select the OK soft key.

7 Select Submit.

The Confirm page appears.

8 Scroll down to review your payment request.

9 To modify the payment, select any of the Payee, From Account, Amount, or Due Date fields.

10 Select Submit to enter your Bill Pay request.

The Submission page appears with a reference number.

To review a scheduled bill payment

1 From the Main Menu, select Pay Bills.

The Pay Bills menu appears.

2 Select the Scheduled link.

The Scheduled view appears.

3 Select a scheduled payment.

The Payment detail page appears.

4 Select the Back soft key to view other payments.

Using Wireless eFinance and eInsurance 6

The Siebel Wireless eFinance and eInsurance applications provide two separate options, one for sales and one for service. Both options provide real-time access to Siebel data from the field, by means of an Internet-enabled wireless device.

The data displayed on the screen is the same data that is displayed on a client workstation. You can view, add, delete, and edit the information from your wireless device.

The two options provide slightly different functionality. The wireless sales application includes access to sales opportunities, and the wireless service application includes access to service requests. In all other respects, the applications are identical.

The screens available in Siebel Wireless Sales and Siebel Wireless Service are:

■ Calendar

■ Contacts

■ Companies

■ Activities

■ Opportunities (Sales only)

■ Service Requests (Service only)

■ Correspondence

This chapter provides basic information about each of these screens.

Main Menu

When you complete the login process, the application displays either the Wireless Sales Main Menu or the Wireless Service Main Menu.

Figure 3 shows an example of the Wireless Sales Main Menu.
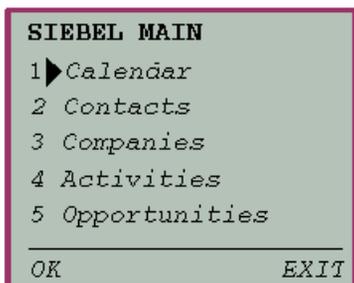
Figure 3.   The Wireless Sales Main Menu

Figure 4 shows an example of the Wireless Service Main Menu.
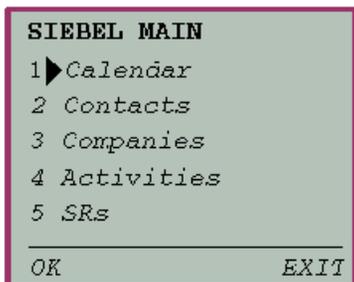
Figure 4.   The Wireless Service Main Menu

The screens shown in this document may or may not reflect the actual screens on a particular device. In many cases, your device will have a different convention for showing links, for indicating a soft key, for linking to another screen or to Siebel data, or for some other feature.

For example, some devices use [square brackets] to indicate linking screen entries (field names, field data, links); other devices use underlines to show the same functionality. Similarly, some devices use OK as the name of the soft key that activates a selected action. Other devices use different soft key names.

Calendar

Use the Calendar view to see your appointments for today or any other day, to modify information, or to add or delete an appointment.

When you select Calendar from the Main Menu, your device displays today's appointments.

You can drill down to see details about any activity displayed on the screen. You can edit activity information from the Activity view.

To display activity details

1 Scroll to the activity for which you want to see details.

2 Press the soft key to link to the selected activity.

The Activity view opens and displays details for the selected activity.

To add a new calendar appointment

1 Scroll to the bottom of the view and select the New link.

2 In the New Activity view, enter the activity type and the start date and time.

3 Enter the description.

4 Click Submit.

5 In the detail record, add company, status, priority, and comments.

Calendar Links

Scroll down past all of the day's activities, and you see the links that are available in the Calendar view.

These links provide access to other features:

■ **More.** Displays additional activities for this date.

■ **Next.** Displays the next date.

■ **Previous.** Displays the previous date.

- **Go to Date.** Displays a search screen to enter a specific date.

- **New.** Adds a new appointment, including type, date, time, and description.

- **Main Menu.** Displays the Main Menu.

Contacts

Use the Contacts view as a gateway to see contact information, to modify information, or to add or delete a contact.

When you select Contacts from the Main Menu, your device displays the Contacts view. When it first opens, the Contacts view provides access to all the contacts currently in the My Contacts view.

The Contacts screen provides access to a search function to display a specific contact, and it also displays the first few of all your contacts. The actual number of contacts displayed depends on the configuration settings.

You can drill down to see details about any contact displayed on the screen. You can edit contact information from the detail view.

To display contact details

1 Scroll to the contact for which you want to see details.

2 Press the soft key to link to the selected contact.

   The Contact view opens and displays details for the selected contact.

To add a new contact

1 Scroll to the bottom of the view and select the New link.

2 In the New Contact view, enter the Last Name.

3 Enter the First Name.

4 Click Submit.

5 In the detail record, enter the contact's work number and cell number.

Searching for a Contact

You can search for contacts using Last Name, First Name, or Social Security Number (SSN).

For information about searching, see .

Contact Links

Scroll down past the contacts displayed, and you see the links available in the Contacts view. These links provide access to other features or records.

■ **More.** Displays the next group of contacts.

■ **All Contacts.** Makes all contacts visible and searchable, not just those in the My Contacts view.

■ **New.** Add a new contact. Displays the New Contact screen, where you proceed to the First Name entry view and the Last Name entry view. You then proceed to the Contact detail screen to add details.

■ **Main Menu.** Displays the Main Menu.

Working with Contact Details

When you drill down on a contact, the Contact screen displays the details about the selected person. Table 16 shows the fields that are displayed on the Contact screen.

Table 16.   Contact Details

Field	Contains	Editable?
Contact Name	The name of the contact	N/A
Title	Contact's title	N/A
Work #	Contact's work telephone number	The field name links to the Work # view where you can edit the number.
Cell #	Contact's cell phone number	The field name links to the Cell # view where you can edit the number.
Address, City, State	Contact's work address	N/A
Home #	Contact's home telephone number	N/A

Contact Detail Links

Scroll down past the contacts detail information, and you see the links available in the Contact view. These links provide access to other features or records concerning the current contact.

- ■ **Claims.** Displays the contact Claims view, a gateway to all the claims associated with this contact. From the Claims view, you can proceed to details for each claim. Claims information is read-only.

- ■ **Policies.** Displays the contact Policies view, a gateway to all the policies associated with this contact. From the Policies view, you can proceed to details for each policy.

- ■ **Company.** Displays the contact Companies view, a gateway to all the companies associated with this contact. From the Companies view, you can add another company or proceed to details for each company.

- ■ **Financial Accounts.** Displays the contact Accounts view, a gateway to the checking, savings, loan, and investment accounts associated with this contact. From the Checking, Savings, and Loan views, you can see details for each account. The Investment view provides access to the Order and Holdings views where you can see details of investments on order or already owned by the contact.

- ■ **Profile.** Displays the contact Profile view, where you can see and edit the contact's DOB (date of birth), marital status, occupation, and annual income.

- ■ **Activities.** Displays the contact Activities view, populated with the activities associated with this contact. From the Activities view, you can proceed to details of each activity and add new activities.

- ■ **Interest.** Displays the contact Interest view, a gateway to all the investment interests associated with this contact, displayed as symbols. From the Interest view, you can proceed to details for each interest, including the full name of the security, the security type, the level of interest, the quantity, the price, and the date of the reported interest. The Interest view also provides the ability to add a new interest.

■ **Opportunities (Sales only).** Displays the contact Opportunities view, a gateway to opportunities associated with this contact. From the Opportunities view, you can proceed to details for each opportunity, or you can create a new opportunity associated with the contact.

■ **Service Request (Service only).** Displays the contact SRs view, a gateway to service requests associated with this contact. From the SRs view, you can proceed to details for each service request.

■ **Main Menu.** Displays the Main Menu.

Companies

Use the Companies view as a gateway to see company information, to modify information, or to add or delete a company.

When you select Companies from the Main Menu, your device displays the Companies view. When it first opens, the Companies view provides access to all the companies currently in the My Companies view.

The Companies screen provides access to a search function to display a specific company, and it also displays the first few of all your companies. The actual number of companies displayed depends on the configuration settings.

You can drill down to see details about any company displayed on the screen. You can edit company information from the detail view.

To display company details

1 Scroll to the company for which you want to see details.

2 Press the soft key to link to the selected company.

The Company view opens and displays details for the selected company.

To add a new company

1 Scroll to the bottom of the view and select the New link.

2 In the New Company view, enter the new company name.

3 Click Submit.

4 In the detail record, enter the company's phone number, fax number and any notes you want to record.

Searching for a Company

You can search for companies using the company name.

For information about searching, see "Searching" on page 70.

Company Links

Scroll down past the companies displayed, and you see the links available in the Companies view. These links provide access to other features or records.

■ **More.** Displays the next group of companies.

■ **All Companies.** Makes all companies visible and searchable, not just those in the My Companies view.

■ **New.** Adds a new company. Displays the New Company screen, where you enter the company name. You then proceed to the Company detail screen to add details.

■ **Main Menu.** Displays the Main Menu.

Working with Company Details

When you drill down on a company, the Company screen displays the details about the selected company. Table 17 shows the fields that are displayed on the Company screen.

Table 17.   Company Details

Field	Contains	Editable?
Company Name	The name of the company	N/A
Phone #	Company's telephone number	The field name links to the Phone # view where you can edit the number.
Fax #	Company's fax phone number	The field name links to the Fax # view where you can edit the number.
Address, City, State	Company's business address	N/A
Notes	Text notes about the company	The field name links to the Notes view where you can edit the information.

Company Detail Links

Scroll down past the companies detail information, and you see the links available in the Company view. These links provide access to other features or records concerning the current company.

■ **Contacts.** Displays the company Contacts view, a gateway to all the contacts associated with this company. From the Contacts view, you can proceed to details for each contact.

■ **Financial Accounts.** Displays the company financial accounts view, a gateway to the checking, savings, loan, and investment accounts associated with this company. From the Checking, Savings, and Loan views, you can see details for each account. The Investment view provides access to the Order and Holdings views where you can see details of investments on order or already owned by the company.

■ **Opportunities (Sales only).** Displays the company Opportunities view, a gateway to opportunities associated with this company. From the Opportunities view, you can proceed to details for each opportunity, or you can create a new opportunity associated with the company.

■ **Service Requests (Service only).** Displays the company SRs view, a gateway to service requests associated with this company. From the SRs view, you can proceed to details for each service request.

■ **Profile.** Displays the company Profile view, where you can see the company's stock ticker, business, and annual revenue.

■ **Policy.** Displays the company Policy view, where you can see policies associated with this company. From the Policy view, you can proceed to details for each policy.

■ **Activities.** Displays the Activities view, populated with the activities associated with this company. From the Activities view, you can proceed to details of each activity and add new activities.

■ **Main Menu.** Displays the Main Menu.

Activities

Use the Activities view as a gateway to see activity information, to modify information, or to add or delete an activity.

When you select Activities from the Main Menu, your device displays the Activities view. When it first opens, the Activities view provides access to all the activities currently in the My Activities view.

The Activities screen provides access to a search function to display a specific activity, and it also displays the first few of all your activities. The actual number of activities displayed depends on the configuration settings.

You can drill down to see details about any activity displayed on the screen. You can edit activity information from the detail view.

To display activity details

1 Scroll to the activity for which you want to see details.

2 Press the soft key to link to the selected activity.

   The Activity view opens and displays details for the selected activity.

To add a new activity

1 Scroll to the bottom of the view and select the New link.

2 In the New Activity view, enter the activity type and the activity description.

3 Click Submit.

4 In the detail record, add company, status, priority, and comments.

Searching for an Activity

You can search for activities using the activity type, status, or start date.

For information about searching, see "Searching" on page 70.

Activity Links

Scroll down past the activities displayed, and you see the links available in the Activities view. These links provide access to other features or records.

■ **More.** Displays the next group of activities.

■ **New.** Add a new activity. Displays the New Activity screen, where you enter the activity description. You then proceed to the Activity detail screen to add details.

■ **Main Menu.** Displays the Main Menu.

Working with Activity Details

When you drill down on an activity, the Activity screen displays the details about the selected activity. Table 18 shows the fields that are displayed on the Activity screen.

Table 18.   Activity Details

Field	Contains	Editable?
Description	The description for the activity	The field name links to the Description view where you can edit the text.
Planned Start	The date and time the activity is scheduled to start	The field name links to the Planned Start view where you can edit the date and time.
Company	Name of the company associated with the activity	The field name links to the Pick Company view where you can select a different company. The field data links to the Company detail view.
Type	The type of activity, such as meeting, inquiry, and so forth	The field name links to the Pick Type view, where you can select the type of activity.
Status	The status of the activity, such as started, in progress, and so forth	The field name links to the Status view, where you can select the status of the activity.

Table 18.   Activity Details

Field	Contains	Editable?
Due Date	The date the activity is scheduled to finish	N/A
Priority	The priority of the activity, such as ASAP, high, medium, or low	The field name links to the Priority view, where you can select the priority of the activity.
Comments	Text comments about the company	The field name links to the Comments view where you can edit the information.
Assigned To	Employee assigned to this activity	N/A

Activity Detail Links

Scroll down past the activity detail information, and you see the links available in the Activity view. These links provide access to other features or records concerning the current activity.

■ **Contacts.** Displays the activity Contacts view, a gateway to all the contacts associated with this activity. From the Contacts view, you can proceed to details for each contact or associate a new contact to the activity.

■ **Main Menu.** Displays the Main Menu.

Opportunities (Sales Only)

Use the Opportunities view as a gateway to see opportunity information, to modify information, or to add or delete an opportunity.

The Opportunities view is available only in Siebel Wireless Sales. It does not appear in the Wireless Service application.

When you select Opportunities from the Main Menu, your device displays the Opportunities view. When it first opens, the Opportunities view provides access to all the opportunities currently in the My Opportunities view.

The Opportunities screen provides access to a search function to display a specific opportunity, and it also displays the first few of all your opportunities, including the opportunity name and the contact. The actual number of opportunities displayed depends on the configuration settings.

You can drill down to see details about any opportunity displayed on the screen. You can edit opportunity information from the detail view.

To display opportunity details

1 Scroll to the opportunity for which you want to see details.

2 Press the soft key to link to the selected opportunity.

The Opportunity view opens and displays details for the selected opportunity.

To add a new opportunity

1 Scroll to the bottom of the view and select the New link.

2 In the New Opportunity view, enter the opportunity name.

3 Enter the estimated revenue.

4 Enter the close date.

5 Click Submit.

6 In the detail record, enter the sales stage and company.

Searching for an Opportunity

You can search for opportunities using Opportunity Name or Sales Stage.

For information about searching, see "Searching" on page 70.

Opportunity Links

Scroll down past the opportunities displayed, and you see the links available in the Opportunities view. These links provide access to other features or records.

■ **More.** Displays the next group of opportunities.

■ **New.** Add a new opportunity. Displays the New Opportunity screen, where you enter the opportunity name. You then proceed to the Opportunity detail screen to add details.

■ **Main Menu.** Displays the Main Menu.

Working with Opportunity Details

When you drill down on an opportunity, the Opportunity screen displays the details about the selected opportunity. Table 19 shows the fields that are displayed on the Opportunity screen.

Table 19.   Opportunity Details

Field	Contains	Editable?
Opportunity Name	The identifying name of the opportunity	N/A
Revenue	The approximate potential revenue for this opportunity	The field name links to the Revenue view, where the amount can be edited.
Sales Stage	The stage of the opportunity, such as new lead, engaged, action plan identified, and so forth	The field name links to the Sales Stage view, where you can select the opportunity sales stage.

Opportunities (Sales Only)

Table 19.   Opportunity Details

Field	Contains	Editable?
Source	The source of the opportunity, such as Expo or Cold Call	N/A
Description	Description of the opportunity	N/A

Opportunity Detail Links

Scroll down past the opportunity detail information, and you see the links available in the Opportunity view. These links provide access to other features or records concerning the current opportunity.

■ **Products.** Displays the opportunity Product view, which shows the product associated with this opportunity. From the Product view, you can proceed to the Product Pick view to change the associated product.

■ **Contacts.** Displays the opportunity Contacts view, a gateway to all the contacts associated with this opportunity. From the Contacts view, you can proceed to details for each contact.

■ **Companies.** Displays the opportunity Companies view, a gateway to all the companies you can associate with this opportunity. From the Companies view, you can proceed to details for each company.

■ **Activities.** Displays the opportunity Activities view, a gateway to all the activities associated with this opportunity. From the Activities view, you can proceed to details for each activity.

■ **Equity.** Displays the opportunity Equity view, where you can see the type, amount, valuation, shares, and share price associated with this opportunity.

■ **Fixed Income.** Displays the opportunity Fixed Income view, where you can see information such as type, amount, maturity, and so forth, associated with this opportunity.

■ **Advisory.** Displays the opportunity Advisory view, where you can see information such as type, amount, counterpart, retainer, and so forth, associated with this opportunity.

- **Sales Team.** Displays the company Sales view, where you can see and add members of the sales team for this opportunity.

- **Main Menu.** Displays the Main Menu.

Service Requests (Service Only)

Use the Service Requests view as a gateway to see service request information and to modify or add activities associated with a service request.

The Service Requests view is available only in Siebel Wireless Service. It does not appear in the Wireless Sales application.

When you select SRs from the Main Menu, your device displays the SRs (Service Requests) view. When it first opens, the SR view provides access to all the service requests currently in your My Service Requests.

The SRs screen provides access to a search function to display a specific service request, and it also displays the first few of all your service requests. The actual number of service requests displayed depends on the configuration settings.

You can drill down to see details about any service request displayed on the screen. You can proceed to service request contact and company information from the detail view.

To display service request details

1 Scroll to the service request for which you want to see details.

2 Press the soft key to link to the selected service request.

The SR view opens and displays details for the selected service request.

NOTE: You cannot add a new service request using a wireless device. Enter a new service request from a desktop client.

Searching for a Service Request

You can search for service requests using service request number, contact last name, or company name.

For information about searching, see "Searching" on page 70.

Service Request Links

Scroll down past the contacts displayed, and you see the links available in the SRs view. These links provide access to other features or records.

■ **More.** Displays the next group of service requests.

■ **Main Menu.** Displays the Main Menu.

Working with Service Request Details

When you drill down on a service request, the SR screen displays the details about the selected service request. Table 20 shows the fields that are displayed on the Service Request screen.

Table 20.   Service Request Details

Field	Contains	Editable?
SR #	The service request number	N/A
Contact	The last and first name of the contact for this service request	The field data links to the Contact detail view.
Company	The company name associated with this service request	The field name links to the Company detail view.
Area	The area of the service request, such as Hardware or Furniture	N/A
Priority	The priority of the service request	N/A
Status	The current status of the service request	N/A
Substatus	The current substatus of the service request	N/A
Owner	The person responsible for fulfilling the service request	N/A
Open Date	The date the service request was opened	N/A
Close Date	The date the service request was closed	N/A

Service Request Detail Links

Scroll down past the service request detail information, and you see the links available in the SR view. These links provide access to other features or records concerning the current contact.

■ **Activities.** Displays the Activities view, populated with the activities associated with this service request. From the Activities view, you can proceed to details of each activity and add new activities.

■ **Main Menu.** Displays the Main Menu.

Correspondence

Use the Correspondence view as a gateway to see correspondence information, to modify information, or to add a correspondence record.

When you select Correspondence from the Main Menu, your device displays the Correspondence view. When it first opens, the Correspondence view provides access to all the correspondence currently in the My Correspondence view.

The Correspondence screen displays your first few correspondence records. The actual number of correspondence records displayed depends on the configuration settings.

You can drill down to see details about any correspondence displayed on the screen. You can edit the information from the detail view.

To display correspondence details

1 Scroll to the correspondence record for which you want to see details.

2 Press the soft key to link to the selected correspondence.

The Correspondence view opens and displays details for the selected correspondence.

The details include the template name, created date, time frame, ship date, ship method, and fulfillment center. Recipients and enclosures are linked to the correspondence through the recipient and enclosure views. You cannot review or edit the text of the correspondence itself.

To add a new correspondence record

1 Scroll to the bottom of the view and select the New link.

2 In the New Correspondence view, select the template you want to use for this correspondence.

3 Click Submit.

4 In the detail record, enter the correspondence information, such as time frame and ship date.

5 Link to recipients to select the recipients for this correspondence.

6 Link to enclosures to select an enclosure to include with the correspondence.

Searching for Correspondence Templates

You can search for correspondence templates using the template name.

For information about searching, see "Searching" on page 70.

Correspondence Links

Scroll down past the correspondence records displayed, and you see the links available in the Correspondence view. These links provide access to other features or records.

■ **More.** Displays the next group of correspondence.

■ **New.** Adds a new correspondence record. Displays the New Correspondence screen, where you select the template. You then proceed to the Correspondence detail screen to add details.

■ **Main Menu.** Displays the main menu.

Working with Correspondence Details

When you drill down on a particular correspondence, the Correspondence view displays the details about the selected correspondence. Table 21 shows the fields that are displayed in the Correspondence detail view.

Table 21.   Correspondence Details

Field	Contains	Editable?
Template	The name of the template used for this correspondence.	N/A
Created Date	Date the correspondence record was created.	N/A
Status	Status of the correspondence, for example, In Progress.	N/A

Table 21.   Correspondence Details

Field	Contains	Editable?
Time Frame	The time frame in which the correspondence should be sent, such as same day or next day.	The field name links to the Time Frame view where you select a new time frame.
Ship Method	The shipment service to use for the correspondence, such as postal service or Federal Express.	The field name links to the Ship Method view where you can select a new delivery method.
Ship Date	Date the correspondence is to be shipped.	The field name links to the Ship Date view where you can select a new ship date.
Fulfillment Center	Fulfillment center that will send the correspondence.	The field name links to the Fulfillmt Cntr view where you can select a new fulfillment center.

Correspondence Detail Links

Scroll down past the correspondence detail information, and you see the links available in the Correspondence view. These links provide access to other features or records concerning the current correspondence.

■ **Recipients.** Displays the correspondence Recipients view, showing the contacts that will receive this correspondence. From the Recipients view, you can add new recipients or delete a recipient.

■ **Enclosures.** Displays the Enclosures view, showing the enclosures associated with this correspondence. From the Enclosures view, you can add, delete, or change the enclosure for this correspondence.

■ **Submit.** Sends the correspondence for fulfillment. No further changes can be made to the correspondence record.

■ **Main Menu.** Displays the Main Menu.

Common Scenarios

This section gives detailed instructions for tasks you might commonly perform with Siebel Wireless Sales and Service applications:

■ Siebel Wireless Sales

■ Managing the Siebel calendar and updating activities

■ Reviewing company details

■ Creating and updating opportunity information

■ Siebel Wireless Service

■ Managing Service Requests

■ Reviewing Financial Account information

■ Creating contacts and updating contact information

NOTE: The commands required to link and submit changes may vary slightly from browser to browser for these scenarios.

Usage Scenario for Siebel Wireless Sales

This scenario is based on a sales representative who needs to:

■ Manage the Siebel Calendar

■ Update Activities

■ Update Opportunity Information

Managing Your Calendar and Updating Activities

You can manage your calendar and update your activity list by following the steps and suggestions in this section.

1 View your calendar by selecting the Calendar link from the Main Menu.

The Calendar view appears.

2 Navigate to a particular date by selecting the Go to Date link.

The Calendar Search view appears.

3 Enter the desired date.

4 Click the OK soft key and then the Go soft key.

The Calendar view appears for the date you entered.

5 Scroll to the entry you want to open and link to it.

The Activity detail view opens.

6 See if any contacts exist for the activity by clicking the Contacts link.

The activity Contacts view appears.

7 Select the New link to add a new contact to the activity.

The Pick Contact view appears.

8 Select a contact to add to the activity.

The activity Contacts view appears showing the contact you just added.

9 Use the Back function or link to the Main Menu to return to the Calendar view and display the same activity.

10 Add a comment to the activity by selecting the Comments link.

The Comments view appears.

11 Enter the desired text of your comment.

12 Click the OK soft key, and then click Submit.

The comment is entered and you are returned to the Activity detail view.

13 Select the Main menu link to return to the Main Menu.

Reviewing Your Opportunity Information
Review your opportunities by following the steps and suggestions in this section.

1   View your current opportunities by selecting the Opportunities from the Main Menu.

    The Opportunities view shows your opportunities.

2   Create a new opportunity by selecting the New link.

    The New Opportunity view appears.

3   Enter the opportunity name and click the OK soft key.

4   Enter the estimated revenue for this opportunity and click the OK soft key.

5   Enter the estimated close date for this opportunity and click the OK soft key.

6   Click Submit.

    The Opportunities detail view displays the information you have just entered.

7   Add the company name for this opportunity by linking to the Company link.

    The Pick Company view appears.

8   Pick a company from the list.

    The Opportunity detail view appears along with the updated company information.

9   Select the Sales Stage link to pick a sales stage for the opportunity.

    The Sales Stage view appears.

10 Pick the desired sales stage and click OK.

11 Click the Submit soft key.

    The Opportunity view now shows the updated sales stage.

12 Select the Main menu link to return to the Main Menu.

Usage Scenario for Siebel Wireless Service

This scenario is based on a field service worker who needs to investigate service requests and update an activity.

Managing Your Service Requests

You can manage service requests (SRs) by following the steps and suggestions in this section.

1 View service requests by selecting the SRs link from the Main Menu.

The SR view appears with a list of service requests including service request numbers.

2 Select the service request number you are interested in.

The SR detail view appears showing details for the service request you selected.

3 Review the activities associated with the Service Request by selecting the Activities link.

The Activities view appears showing the activities associated with the SR.

4 View the details of an activity by linking to the activity you are interested in.

The Activity view appears showing the details for the activity in which you are interested.

5 Enter a comment by linking to the Comments view and typing the comment.

6 Click the OK soft key and then choose Submit.

The Activity detail view appears, showing the comment you just entered.

7 Select the Main Menu link to return to the Main Menu.

The Main Menu appears.

Troubleshooting Siebel Wireless Problems A

This appendix covers the problems most likely to occur during use of the product and provides some ways to resolve those problems.

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Error Message Appears When Using Back Button

When using the browser's Back button, a user may see an error message such as "End of file error," or "An error happened restoring the context for this location." This occurs on browsers that do not implement page caching.

The user should use the main menu link to display the Main Menu, and continue from that location.

Activity Description Is Lost

Text entered for new Activity Description may be lost on an HTML browser, if a user selects the Type link after entering the description text.

The user should be sure to select the Activity Type before entering the text for Activity Description.

Digest Too Large

Some wireless gateways and browsers impose a limit on the number of bytes that can be sent to a wireless device in a WLM deck. This limit results in error messages such as "Digest too large," or "Entered text too long." In certain cases, the browser may not finish downloading the deck.

Siebel Wireless applications address this limitation in their default configurations. such as returning only three records with each list.

This limitation may also be addressed with configuration changes to reduce the number of fields displayed, or the allowable size of text fields. For additional information, see "Altering the Number of Records Returned by Lists" on page 35.

Digest Too Large

Siebel Mobile Connector   B

Siebel Wireless includes a license key for Siebel Mobile Connector, through which you can develop additional wireless, voice and other applications upon executing the proper licensing agreement.

Siebel Mobile Connector uses well-formed XML to exchange information with an application either through directed query or push alerts. In addition, the XML interface allows the use of XSL stylesheets to limit the data fields returned in XML format.

Siebel Mobile Connector includes several components beyond the XML Web Interface:

- Pre-defined Application Definition

  Siebel Mobile Connector provides a pre-configured, optimized Siebel application definition, which provides the following access:

  - Employees and Partners: Accounts, Activities, Contacts, Employees, Opportunities, Service Requests, System Administrator: Responsibility Views and Users

  - Customer Self-service: eService Requests, eOrders, Branch LocatorSiebel Mobile Connector use the Siebel Framework. The application definition can be modified within Siebel Tools.

■ Metadata Business Service

The Metadata Business Service allows customers and partners to filter data offered through the pre-configured application definitions without having to use Siebel Tools to permanently change the application configuration.

The Metadata Business Service allows the extraction, parsing and creation of stylesheets from Siebel-created or customer or partner-created application definitions.

Siebel Mobile Connector stylesheets are stored as XSL documents on Siebel Application Server. When a stylesheet is applied during a query by a mobile application, the resulting data returned contains only the fields identified in the specified stylesheet.

■ Reference Configuration Sample

The Reference Configuration Sample is a sample application that uses the Metadata Business Service to enable developers to create stylesheets and alerts.

The sample application allows the developer to select the fields that represent the application user interface, any fields for updates, and the fields for alerts to be triggered upon. Once selected, submission to the Metadata Business Service creates the stylesheets that are stored on Siebel Application Server.

■ Uploading Files

Through specialized frame and control provided in the Siebel Mobile Connector application definition, applications can upload files and save them as attachments in the Siebel file system. The files are saved in a compressed format in the system and are decompressed when users request to download them. This is useful for speech applications that need to save audio files representing free-form fields.

■ Data Updates and One-Way Synchronization

In some instances, an application may require a local copy of a subset of Siebel data for its own use. Such applications can periodically check whether there is any new data is available and retrieve just the data that has changed. This can be useful for synchronization of records or for real-time dynamic grammars (for speech applications).

■ Alert Business Service

Siebel Mobile Connector Alert Business Service pushes alerts to a registered application that processes them to send notification messages to users. The alerts capture both pre-write as well as post-write data that is sent to the registered application. This allows the registered application to take appropriate action based on these changes. This is useful for notification of Service Request ownership changes from one user to another.

For additional information, see *Siebel Mobile Connector Guide*.

WAP Server Deployment Options   C

The WAP server can be hosted either by the wireless carrier or by your own enterprise.

This section explains the two deployment options and suggests reasons you might choose one over the other.

In addition to the carrier solution discussed in "External IP Address" on page 20, Siebel also supports an enterprise solution in which the wireless gateway is located within the enterprise's network firewall. This solution may provide an additional level of security.

Data sent across the Internet between the enterprise Web server and the carrier's WAP gateway is through the HTTP protocol and is *not* encrypted. However, it is possible to alternatively use the HTTPs protocol, which is encrypted. Traffic between the WAP gateway and the wireless device uses the WAP protocol and is encrypted. Be sure to verify all encryption information with your carrier.

If security is paramount and you are using a carrier solution, it is possible to set up a secure data connection for the carrier solution. This would connect the carrier's WAP gateway to the enterprise Web server, thereby bypassing the Internet. Additionally, there is reduced latency with this solution.

Carrier Option

With this option, the carrier (wireless network operator) hosts the WAP server, while your enterprise hosts all other components, as shown in Figure 5. The most important feature of this scenario is that the Web server and the WAP server are not within the same firewall.
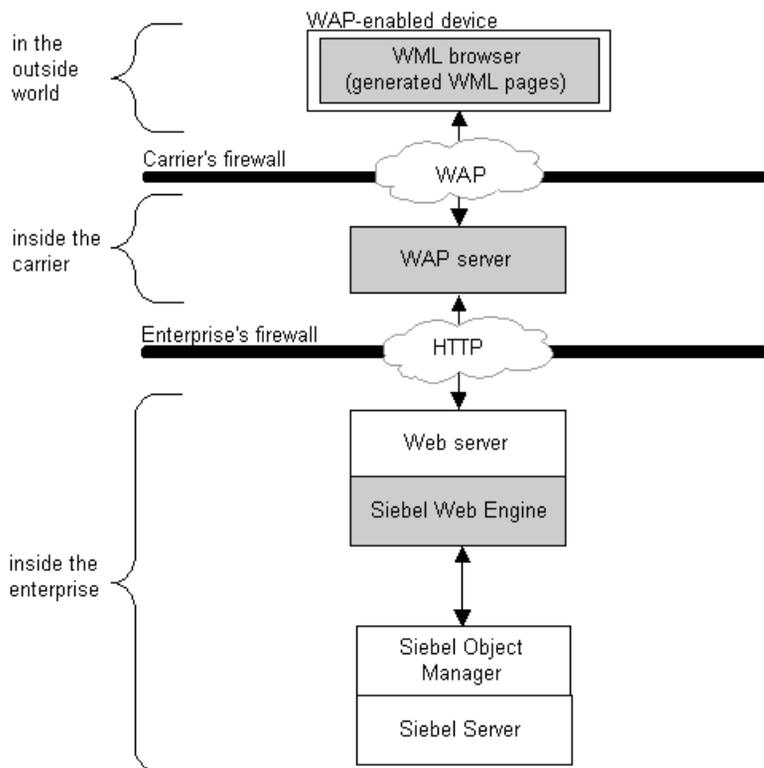
Figure 5. WAP Server and Web Server Behind Different Firewalls

There is latency associated with the Internet connection between the WAP server and the Web server. A dedicated private Internet connection can improve such latency.

Table 22 summarizes the benefits and drawbacks of the Carrier Option.

Table 22. Carrier Option: Benefits and Drawbacks

Benefits	Drawbacks
■ The use of the server is part of your wireless data service. You don't need to license additional software. ■ No setup is required for the WAP server, though there may be additional costs if you choose to install a dedicated line between the enterprise and the carrier. ■ The maximum number of concurrent users can be significantly higher than through an enterprise WAP server.	■ There is latency associated with the Internet connection between the WAP server and the Web server.

Contact your carrier if you have questions about the carrier's WAP server.

Enterprise Option

This option is the alternative to the Carrier Option. Rather than relying on your carrier's WAP server, you install your own WAP server on a machine inside your enterprise's firewall, as shown in Figure 6.
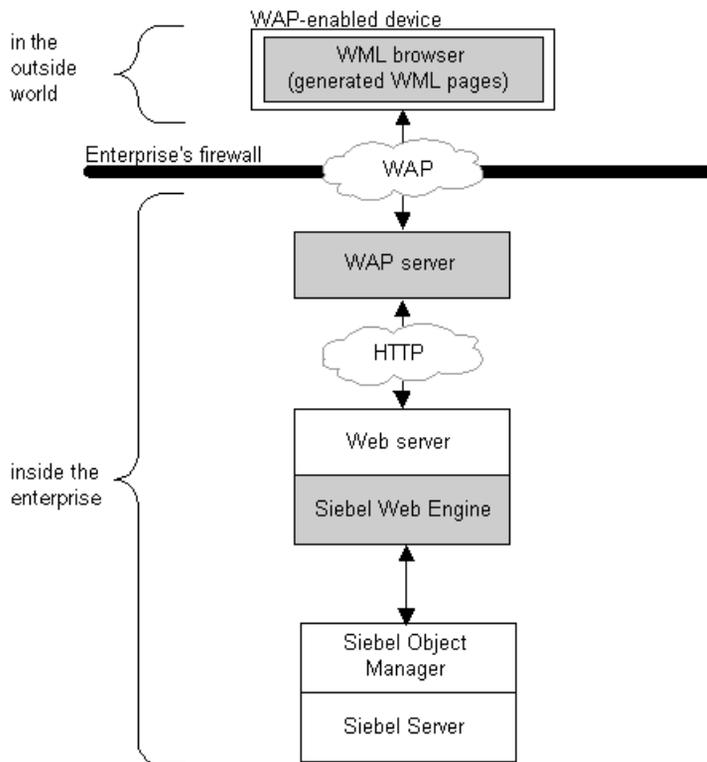
Figure 6. WAP Server and Web Server Behind the Same Firewall

With the Enterprise Option, you minimize security and latency concerns but incur the cost of buying, setting up, and maintaining your own WAP server, modem bank, and remote access server (RAS), as shown in Table 23.

Table 23. Enterprise Option: Benefits and Drawbacks

Benefits	Drawbacks
■ Data is secure during the entire transaction, assuming the security software for the WAP server is properly installed. ■ You have more control over the entire system, are able to create backups, and can better manage security and latency.	■ You need to purchase a WAP server. ■ You are responsible for purchasing and setting up the additional components, including RAS software and a modem bank. ■ The additional setup adds to the implementation time.

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