



**SIEBEL**<sup>®</sup> 7  
eBusiness

**SIEBEL eBRIEFINGS  
ADMINISTRATION GUIDE**

*VERSION 7.5*

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# Introduction

This guide explains how to administer and configure Siebel eBriefings.

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

<b>Marketing Administrators</b>	Persons responsible for setting up and maintaining a marketing department. Duties include designing and managing campaigns, product marketing information, and product distribution lists.
<b>Siebel Application Administrators</b>	Persons responsible for planning, setting up, and maintaining Siebel applications.
<b>Siebel Application Developers</b>	Persons who plan, implement, and configure Siebel applications, possibly adding new functionality.
<b>Siebel System Administrators</b>	Persons responsible for the whole system, including installing, maintaining, and upgrading Siebel applications.

To benefit from the configuration sections of this book, you should have an understanding of the Siebel environment, Siebel applications, and the Web environment. You should also feel comfortable working with Siebel Tools.

# How This Guide Is Organized

This guide provides information necessary to administer and configure your Siebel eBriefings application.

- Readers looking for an overview of the product should read [Chapter 2, “Understanding Siebel eBriefings.”](#)
- If you are an administrator, [Chapter 5, “Administering Siebel eBriefings,”](#) will tell you how to complete Siebel eBriefings administration tasks.
- If you are an application developer or configurator, the following chapters address Siebel eBriefings configuration topics:
  - [Chapter 3, “Configuring Siebel eBriefings,”](#) provides you with procedures for configuring your Siebel eBriefings application.
  - [Chapter 4, “Integrating External Content,”](#) covers the Siebel eBriefings Content Broker feature and walks you through an example of how to integrate external content into your Siebel eBriefings application.
  - [Chapter 6, “Troubleshooting,”](#) presents common problems experienced by Siebel eBriefings users and potential solutions.

This guide is designed to cover information specific to Siebel eBriefings. Where generic information is required to complete a task or understand a concept, the related books are referenced.

# **Revision History**

*Siebel eBriefings Administration Guide, Version 7.5*

## **Introduction**

*Revision History*

Before you can use Siebel eBriefings, you need to have completed the following installation tasks:

- Install the Siebel Gateway Server
- Install the Siebel Server
- Set up the Siebel File System
- Install the Siebel Web Server
- Install the Siebel Mobile Web Client

For information on how to complete these tasks, see *Siebel Server Installation Guide for Microsoft Windows* and *Siebel Web Client Administration Guide*.

## Setup Tasks

If your company has purchased Siebel eContent Services, you must complete the tasks described in [Table 1](#) for external content to be displayed on the Briefing pages.

**Table 1. Setting up Siebel eContent Service**

<b>Task</b>	<b>Where to find more information</b>
Set host and authentication credentials	<a href="#">“Connecting to eContent Services” on page 42</a>
Add Industry Content Services	<a href="#">“Siebel Industry Content Services and Additional Language Content Services” on page 44</a>
Create account topics for your accounts and competitors	<a href="#">“Associating Accounts with Topics” on page 70</a>
Add an account topic for your company	<a href="#">“Associating a Topic with Your Company” on page 72</a>
Have users set up their tracking profiles	<a href="#">“Supporting User Tracking Profiles” on page 83</a>

Siebel eBriefings is a knowledge management tool that is designed to help your employees and partners be more effective in acquiring and retaining customers.

By using eBriefings, sales, marketing, and service professionals have instant access to relevant, critical business information about customers, prospects, markets, and competitors. Siebel eBriefings accomplishes this by providing a framework for integrating external content in context with your Siebel application. It aggregates relevant business information from inside and outside your organization into easy-to-use, personalized Web pages. Siebel eBriefings displays eBusiness data from the Siebel database, such as opportunities, service requests, and contacts, alongside news and other information from external content providers.

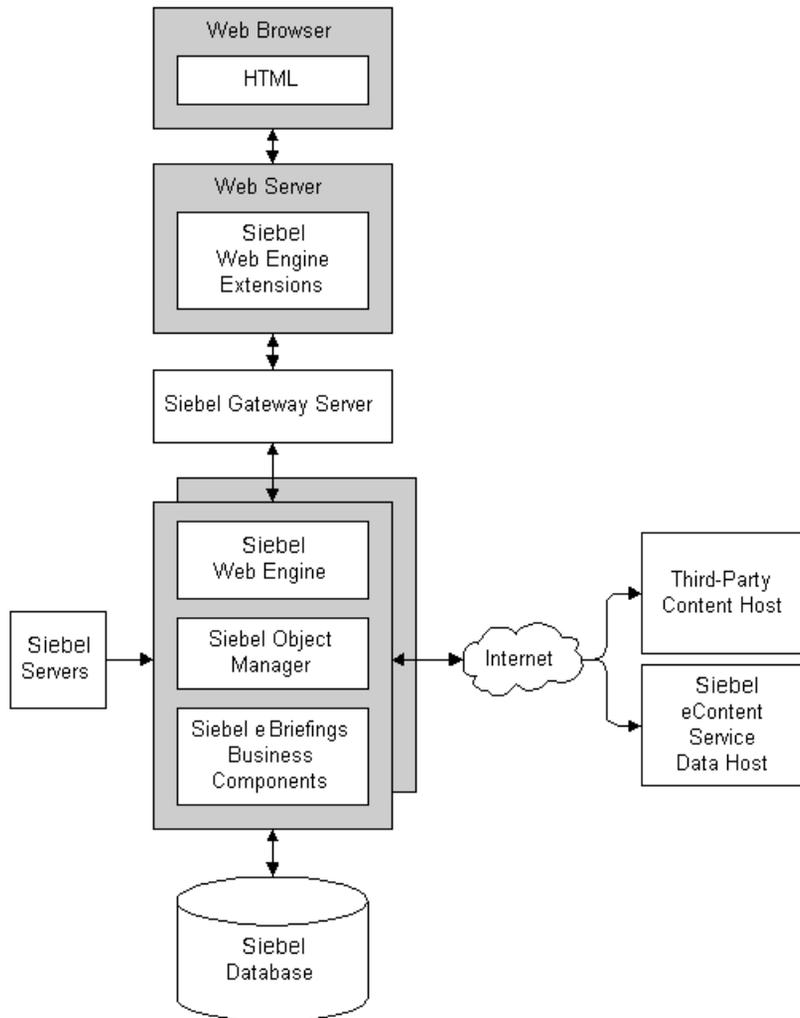
Siebel eBriefings delivers critical business information in four types of Briefing documents.

- **My Briefing.** Provides critical business information that can be personalized by the user. It provides information such as new opportunities, accounts, calendar, service requests, news, expense report status, company announcements, literature from the Siebel Encyclopedia, links to useful Web sites, and Web clips.
- **Account Briefing.** Provides a view of customers across every touch point, including recent news, detailed company profiles, opportunities, service requests, quotes, activities, and account team.
- **Competitor Briefing.** Provides a summary of competitor information, including recent news, detailed company profile, product information, and recommended literature.
- **Company Briefing.** Provides users with the ability to get information from a Siebel eContent Services company database containing thousands of public and private companies. Information includes news, company profiles, and corporate relationships.

The external content for these briefings is preconfigured to integrate with Siebel eBriefings if customers subscribe to Siebel eContent Services. However, other external, Web-based sources can also be configured to integrate with eBriefings.

# The Siebel eBriefings Environment

Siebel eBriefings is a zero-footprint application that users can access using a standard Web browser. Siebel eBriefings accesses servers outside your company's firewall to provide users with information from external content providers, such as Siebel eContent Services. [Figure 1 on page 15](#) shows the Siebel eBriefings architecture. The illustration shows a Web browser that connects to a Web server. The Web server connects to the Siebel Gateway, which in turn connects to the other Siebel servers. The Siebel servers are connected to a database and, through the Internet, to eContent Services.



**Figure 1. Siebel eBriefings Architecture**

For more information about the Siebel zero-footprint architecture, see the *Siebel Web Client Administration Guide*.

# About Siebel eContent Services

Customers who subscribe to Siebel eContent Services receive premium news and company information from multiple sources that integrate preconfigured with Siebel eBriefings.

Siebel eContent Services includes leading newswires, business magazines, newspapers, and trade journals. It provides news, company profiles, corporate relationship information, market data and other relevant content that appears in context with your Siebel data.

# About Briefings

Siebel eBriefings aggregates Siebel data, news articles, company profiles, marketing literature, and other external data in Briefing documents. Information from outside your company is presented in the context of front-office data. For example, an Account Briefing contains information from your Siebel database, such as opportunities and service requests, as well as recent news articles about that account.

Briefing documents provide one-click access to business applications and external content sources. Users can get more detailed information by drilling down from Briefing documents into other modules in their Siebel application or they can click hyperlinks to go to external Web sites.

The four types of Briefings are:

- My Briefing
- Account Briefing
- Competitor Briefing
- Company Briefing

## My Briefing

My Briefing allows sales, marketing, and service professionals to get a daily summary of critical business information. It provides them with new opportunities, service requests, calendar, recent news, and other information. The information in My Briefing is personalized for each user based on responsibilities and preferences set in the user's tracking profile.

For more information on tracking profiles, see [“Tracking Profile” on page 27](#).

### My Briefing Internal Data Sections

[Table 2](#) describes the My Briefing sections that display data from the Siebel database. The search and sort specifications for internal sections are defined in the predefined query named My Briefings.

For more information about predefined queries, see [“Modifying Predefined Queries” on page 80](#).

**Table 2. My Briefings Internal Sections**

Section	Description	Controlled by Tracking Profile
My Opportunities	Displays the user's opportunities created within the last year (365 days).	No
New Bulletins	Used to alert users of important company announcements. Displays broadcast messages defined in Communications Administration > Message Broadcasts view available from the Site Map. Messages that are created between the activation and expiration dates and designated for Siebel eBriefings appear as bulletins in this section. Messages are sorted by creation date, and then by abstract.	No
My Calendar	Displays activities that are not marked as done, canceled, or declined. This includes today's activities, pending activities, and overdue activities. The calendar can be displayed in daily, weekly, or monthly format. Users can view and maintain their own appointments as well as view calendars of team members who have granted access.	No
Expense Reports	Displays the user's expense reports that have not been marked as paid; sorted by creation date.	No

**Table 2. My Briefings Internal Sections**

<b>Section</b>	<b>Description</b>	<b>Controlled by Tracking Profile</b>
New Service Requests	Displays all open or pending service requests associated with the accounts to which the user is assigned and that were created within the past year. Service requests are sorted by status, and then by severity.	No
New Accounts	Displays all accounts to which the user is assigned and that are marked new. Accounts are sorted by name.	No
New Contacts	Displays contacts created within the last year to which the user is in the access list as a secondary user. Contacts are sorted by Last Name.  A secondary user is one who has been granted access to the record, but did not create the record.	No
Products	Displays new products.	No
Literature	Displays links to literature items in the Siebel Encyclopedia about topics defined on the user's tracking profile. The current date must be between the release and expiration dates.	Yes
Recommended Links	Displays links to recommended Web pages. Recommended links are defined as literature items in the Siebel Encyclopedia. The literature type is Recommended Link and the Web display method is anything other than In-Line.	Yes
Web Clips	Displays the target Web page of a recommended link in-line with other sections. Web clips are recommended links defined in the Siebel Encyclopedia with a Web display method of In-Line.	Yes

## My Briefing External Data Sections

Table 3 describes the My Briefing sections that display data from Siebel eContent Services.

**Table 3. My Briefing External Data Sections**

Section	Description	Controlled by Tracking Profile
Our Company In The News	<p>Displays recent news articles from Siebel eContent Service about the user's company. You can click on the company name to get all news articles available in the archive.</p> <p>Users can perform a full text search for any search string and retrieve articles matching the string in the headline or body of the article. The resulting headlines can be further refined by adding an additional search term.</p>	No
Account/Competitor News	<p>Displays recent news articles about accounts and competitors defined on the user's tracking profile. Articles are grouped by company. The default display format shows the article headline and the publisher's name.</p> <p>Users can perform a full text search for any search string and retrieve articles matching the string in the headline or body of the article. The resulting headlines can be further refined by adding an additional search term.</p>	Yes
My News	<p>Displays recent news articles about topics the user has defined on the tracking profile. Users can choose from a preformatted set of search topics such as headline news or from topics created by their administrator.</p> <p>Users can perform a full text search for any search string and retrieve articles matching the string in the headline or body of the article. The resulting headlines can be further refined by adding an additional search term.</p>	Yes
Company Search	<p>Allows users to search the Siebel Company database to locate a company and obtain a Company Briefing that provides a corporate profile and related news.</p>	No

**Table 3. My Briefing External Data Sections**

<b>Section</b>	<b>Description</b>	<b>Controlled by Tracking Profile</b>
Web Search	Allows users to search the Web using a leading Internet search engine. Users enter the search terms and the results are displayed in a new browser window.	No
My Stocks	Allows users to select the stocks they want to appear. This page can be configured with the user's tracking profile. The section is populated using the information provided by a third-party vendor of the customer's choice.	Yes
Weather	Displays a current weather summary for the ZIP code selected on the user's tracking profile.	Yes
Yellow Pages Search	Allows users to locate businesses by address and telephone number.	No
Map Search	Allows users to retrieve maps, directions, and travel distance information.	No

## Account Briefing

Account Briefings help users prepare for customer calls by keeping them informed about aspects of their accounts. An Account Briefing is a single Web page that summarizes interactions with the customer and includes news and company profile information. It also gives users access to related literature in the Siebel Encyclopedia, such as presentations, brochures, and recommended links.

Users can access Account Briefings from several views. Each view provides the user with a different subset of account records.

- **My Tracked Accounts.** Lists the accounts users have selected on their tracking profiles.
- **My Accounts.** Lists those accounts to which the user has been assigned to the account team.
- **My Team's Accounts.** Lists the user's accounts and those accounts for which the primary sales team member is a direct subordinate of the user.
- **All Accounts.** Lists all accounts to which the user has access based on visibility rules.

---

**NOTE:** Access to views is based on each user's responsibilities. Not all users will have the views listed above. For example, only managers will have access to My Team's Accounts. For more information about responsibilities and views, see *Applications Administration Guide*.

---

## Account Briefing Sections That Display Siebel Data

Table 4 describes the Account Briefing sections that display data from your Siebel database. The search and sort specifications for internal sections are defined in the predefined query named Account. For more information about predefined queries, see “[Modifying Predefined Queries](#)” on page 80.

**Table 4. Account Briefings Siebel Data Sections**

Section	Description
Header	Displays the name of the current company and a link to the company’s home page. It also contains an Edit Layout button that allows users to modify the layout of the Account Briefing.
Table of Contents	Displays Account Briefing sections. Sections that contain available data appear as hyperlinks.
Opportunities	Displays account opportunities created in the last 30 days. Opportunities are sorted by revenue, and then probability percentage of the primary user.
Service Requests	Displays the service requests related to the account. Service requests are sorted by status, then creation date.
Contacts	Displays contacts related to the account that were created within the last 30 days. Contacts are sorted by last name, and then first name.
Activities	Displays account activities for the last 30 days. Activities are sorted by type, and then description.
Quotes	Displays quotes related to the account. Quotes are sorted by end date. Quotes that are less than 30 days old are displayed.
Service Agreements	Displays service agreements related to the account. Service agreements are sorted by end date. Service agreements that are less than 30 days old are displayed.
Account Team Members	Displays employees who are on the sales team for the account.
Literature	Displays links to literature items in the Siebel Encyclopedia related to the account. The current date must be between the release and expiration dates.
Recommended Literature	Displays links to literature items in the Siebel Encyclopedia related to the account. The current date must be between the release and expiration dates.

**Table 4. Account Briefings Siebel Data Sections**

Section	Description
Recommended Links	Displays links to recommended Web pages. Recommended links are defined as literature items in the Siebel Encyclopedia. The literature type is Recommended Link, and the Web display method is not In-Line.
Web Clips	Displays a Web page related to this account in-line with other sections. Web Clips are recommended links defined in the Siebel Encyclopedia with a Web display method of In-Line.

### Account Briefing Sections That Display External Data

[Table 5](#) describes the Account Briefing sections that display data from Siebel eContent Services.

**Table 5. Account Briefing External Data Sections**

Section	Description
Profile	Summary of company data provided by a Siebel eContent Services content provider.
News	News about the account from external news wires.
Market Information	Displays stock information such as the current price, last trade, the net change for the day, trading volume, 52-week high and low, and other market-related data.
Corporate Relationships	Displays affiliated companies sorted by name.
Additional Information	Links to stock chart and SEC filings for the account and links to Internet search engines. When users click these links, the search arguments are passed to the target site and a search is automatically performed for information about the current account.

## Competitor Briefing

The Competitor Briefing helps employees stay informed by gathering information about competitors. It provides them with current market information, product information, company information, a list of corporate affiliations, and access to related literature from the Siebel Encyclopedia.

Users access Competitor Briefings using one of the two following views:

**My Tracked Competitors.** Lists the competitors that users have selected in their tracking profiles.

**All Competitors.** Lists all competitors to which the user has access based on visibility rules.

### Competitor Briefing Sections That Display Siebel Data

Table 6 describes the Competitor Briefing sections that display data from the Siebel database. The search and sort specifications for internal sections are defined in the predefined query named Competitor. For more information about predefined queries, see [“Modifying Predefined Queries” on page 80](#).

**Table 6. Competitor Briefing Siebel Data Sections**

Section	Description
Products	Displays a list of competitor products sorted by name.
Competitive Literature	Displays literature from the Siebel Encyclopedia that has been associated with the competitor. Competitive Literature is sorted by sales tool type, and then by name.
Recommended Literature	Displays links to literature items in the Siebel Encyclopedia related to the competitor. The current date must be between the literature item’s release and expiration dates. Literature is sorted by sales tool type, and then by name.
Recommended Links	Displays links to recommended Web pages. Recommended links are defined as literature items in the Siebel Encyclopedia. The literature type is Recommended Link, and the Web display method is not In-Line.
Web Clips	Displays a Web page related to this competitor in-line with other sections. Web clips are recommended links defined in the Siebel Encyclopedia with a Web display method of In-Line.

## Competitor Briefing Sections That Display External Data

Table 7 describes the Competitor Briefing data sections that display external data from Siebel eContent Services.

**Table 7. Competitor Briefing External Data Sections**

Section	Description
Profile	Summary of company data provided by a Siebel eContent Services content provider.
News	Displays recent news related to the competitor from Siebel eContent Services news providers.
Corporate Relationships	Displays affiliated companies sorted by name. Users can view Company Briefings for these companies.
Market Information	Displays stock information such as the current price, last trade, the net change for the day, trading volume, 52-week high and low, and other market-related data.
Additional Information	Links to stock charts, SEC filings, and Internet search engines. When users click these links, the search arguments are passed to the target site and a search is automatically performed.

## Company Briefing

Siebel eContent Services publishes a database of thousands of public and private companies. Users can get Company Briefings for any of these companies using the Company Search feature on the My Briefing page. When a user enters a query in the Company Search section, matching records from the Siebel eContent Services Company Database are displayed in the Search Results section with links to Company Briefings. This allows users to gather information about companies they may not be tracking as accounts or competitors.

After the query results are returned, the user can click the name of a company, and a Company Briefing appears.

Company Briefings provide external information about the company such as news, a company profile, information about corporate affiliates, and links to additional information on the Internet.

### Company Briefing Sections That Display External Data

[Table 8](#) describes the external data sections that are displayed in Company Briefings.

**Table 8. Company Briefing External Data Sections**

Section	Description
Company News	Displays recent news articles related to the company from Siebel eContent Service news providers.
Company Profile	Summary of company data provided by a Siebel eContent Service content provider.
Corporate Relationships	Displays affiliated companies sorted by name.
Additional Information	Links to SEC filings for the company and links to Internet search engines or other relevant information. When users click these links, the search criteria are passed to the target site and the search is performed automatically.
Market Information	Displays stock information such as the current price, last trade, net change for the day, trading volume, 52-week high and low, and other market related data.

## Additional Features

Siebel eBriefings includes several key features that provide users with relevant, critical business information. These features include:

- [My News Topics](#)
- [Tracking Profile](#)
- [Edit Layout Preferences on page 28](#)
- [Bulletins on page 29](#)
- [Siebel Search on page 30](#)
- [Recommended Links on page 30](#)
- [Web Clips on page 30](#)

### My News Topics

Users can create ad hoc custom news topics that are displayed on their My Briefings page. Users select My News Topic from the drop-down list of the eBriefings screen, and then click the User-Defined tab. A full-text expression can be entered and articles containing that expression are tracked. For example, if the expression software is entered, news articles reflecting this industry and product segment are displayed on the My News section of the My Briefings page.

In the My News Topic view, users can also customize the layout of the articles, the number of headlines displayed for each tracked topic, and the number of days the search topic will be active.

### Tracking Profile

The tracking profile allows users to control much of the information that appears in their My Briefing document. Users choose the topics that they want to track. Only the information related to the selected topics appears in the My Briefing document. This allows users to filter out information that is not relevant to their interests and responsibilities.

The tracking profile allows users to select:

- Accounts
- Competitors
- Industries
- Products
- News topics

After the user selects specific accounts, news, literature from the Siebel Encyclopedia, recommended links, and Web clips related to these accounts appear in the user's My Briefing page.

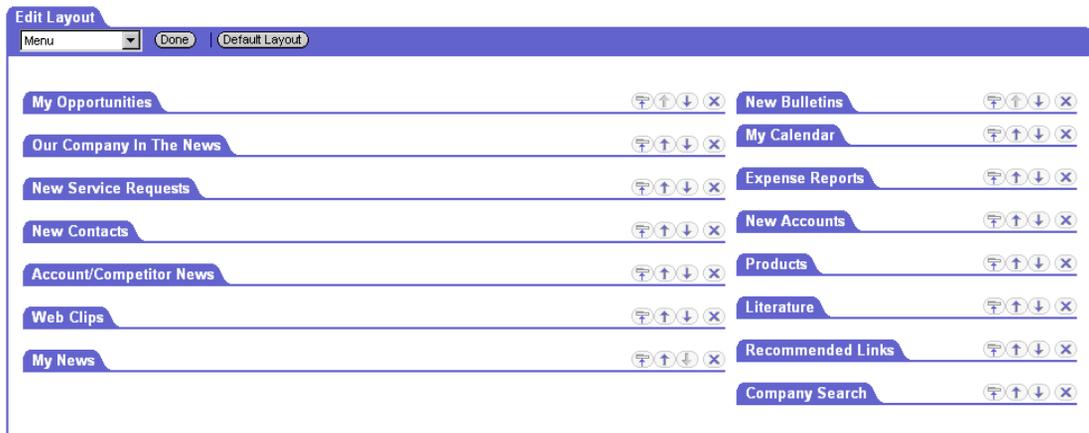
The tracking profile controls the following sections of the My Briefing document:

- Account/Competitor News
- Literature
- Recommended Links
- Web Clips
- My News

### **Edit Layout Preferences**

Users can personalize the applets displayed on Briefing pages and choose their preferred layout. Users can either use the buttons above each applet or click on the Edit Layout button on each briefing page.

The Content Selection and Layout view, shown in [Figure 2](#), allows users to see the order of applets and whether they are displayed or hidden. This view also allows users to display applets, reposition applets, and to return the page layout to the default setting. The Content Selection and Layout view is available by clicking the Edit Layout button at the top of the briefing pages.



**Figure 2. Content Selection and Layout View**

Layout preferences are stored as part of the user profile and are independent of the client machine being used.

## Bulletins

Bulletins are internal company broadcast messages that alert users to important internal events and announcements from your company. Bulletins appear in the New Bulletins section of users' My Briefings documents. Users see bulletins that are associated with their user name or division, or those that are broadcast to the entire organization. Typically, bulletins are generated by a system administrator or designated employees who have privileges to publish bulletins.

For more information about creating Bulletins, see [“Publishing Bulletins” on page 78](#).

## Siebel Search

Users can search the Siebel database by clicking the search button (small binoculars icon) in the upper-right area of any window. [Table 9](#) summarizes the types of data and searchable fields.

**Table 9. Siebel Search**

You can search for...	By entering...	Siebel Search displays...
Accounts	Account Name	Accounts in the user's organization
Contacts	Last Name	All contacts
Employees	First Name or Last Name	All employees
Literature	Name, Description, or Author	All literature in the Siebel Encyclopedia
Opportunities	Name	Opportunities that are visible to the sales representative
Service Requests	Service Request Number	All service requests in the user's organization

## Recommended Links

Recommended links are hyperlinks that appear in Briefing documents. They are links to recommended Web sites defined and published by a marketing administrator. Administrators define and publish recommended links using the Document Administration > Literature view from the Site Map. Recommended links are stored in the Siebel Encyclopedia.

For information about how to publish recommended links, see [“Publishing Web Clips and Recommended Links” on page 74](#).

## Web Clips

Web clips are static Web pages displayed in Briefing documents. Marketing administrators define and publish Web clips using the Document Administration > Literature view from the Site Map. Web clips are stored in the Siebel Encyclopedia as a specialized type of recommended link.

For information about how to publish Web clips, see [“Publishing Web Clips and Recommended Links” on page 74](#).

In addition to the standard configuration tasks necessary for implementing any Siebel application, you may want to configure your eBriefings application to implement specific features.

- Making My Briefing your home page
- Adding D&B user credentials
- Enabling drill-down destinations from Siebel eBriefings views

For information about installing Siebel applications, or general Siebel parameters, see *Siebel Server Installation Guide for Microsoft Windows* and *Siebel Web Client Administration Guide*.

For general information about configuring Siebel applications, see *Siebel eSales Administration Guide*.

## **Making My Briefing Your Home Page**

Users may wish to make My Briefing the default home page for their Siebel base application, rather than using the home page that comes with the base application. The My Briefing page displays data from your company's Siebel database in context with customized news and information from external sources. This functionality is not available from the preconfigured home page. Using Siebel Tools, you can configure your application to default to My Briefing as the home page. The following steps illustrate how to do this, using an example in which your base application is Siebel Sales.

### ***To make My Briefings the home page for users***

You must replace the default Home Screen with the SI eBriefings Screen to display the My Briefing page. For example, in Siebel Sales, the home page defaults to the Web Sales Home Screen.

- 1** Open Siebel Tools and navigate to your base application; for example, Application Siebel Sales.
- 2** Highlight the Home Screen. For example, highlight Web Sales Home Screen (sequence 10).
- 3** Change the Home Screen to SI eBriefings Screen.
- 4** Move off the record to commit your changes.
- 5** Compile and test the Siebel Repository File (SRF).

To implement this, the new SRF must be released to the Siebel server and to any users that are running the local client on their computer.

## Adding D&B User Credentials

In addition to D&B Company Profiles provided by eBriefings, Siebel Systems and D&B offer a co-branded Web site that allows Siebel customers access to the D&B detailed business and credit reports through their Siebel application. These reports include Business Background Reports, Financial Profiles, Payment Analysis Reports, and Supplier Evaluations.

Siebel customers have two options for providing users with access to D&B business and credit reports.

- **Credit card access.** Default option that requires the user to enter credit card information for payment.
- **Contract access.** Requires customers to sign a contract with D&B. Customers are then given login credentials to use each time they order D&B reports, and the price of the report is billed against the contract.

If your company has a contract with D&B to purchase these reports, you can configure your Siebel eBriefings application to allow users contract access to the D&B company report site. This will allow your employees to click a D&B link in the Additional Information section of Briefing documents and enter the D&B Report site with contract access.

To enable the D&B link, you will need to enter your company's D&B account name and password in the Host Administration applet in the Administration view.

#### **To enable contract access to the D&B report Web site**

- 1** Navigate to Integration Administration and click Symbolic URL Administration.
- 2** Select the AccountAdditionalInfo symbolic URL name.
- 3** Supply the following URL Arguments:

<b>Field</b>	<b>Comments</b>
DNB Link	Specify a value of "Contract."
DNB Password	The password is the password from the login credentials issued by D&B.
DNB User	The value is the user name from the login credentials issued by D&B.

- 4** Repeat the above steps for the CompanyAdditionalInfo symbolic URL name.

When users click the D&B link that appears in Account, Competitor, or Company Briefings, they enter the D&B Company Report site with contract access.

For more information about D&B reports and services, see *Applications Administration Guide*.

## Enabling Drill-Down Destinations

Siebel eBriefings allows users to drill-down from applets in Siebel eBriefings views, (My Briefing, Account Briefing, Competitor Briefing, and Company Briefing) to other views. For example, a user reviewing his or her opportunities listed on the My Briefing page can click the name of the opportunity and drill-down to the Opportunity view.

To enable this behavior, a Siebel eBriefings-specific screen contains all views that are drill-down destinations from any Siebel eBriefings applet. This is a hidden screen that is not exposed to users.

If you add or modify applets to Siebel eBriefings views and you want users to be able to drill-down from the applet to another view, you must include the destination view on this screen. The name of the screen is SI Drilldown Destinations Screen.

This is a special behavior unique to Siebel eBriefings; it does not apply to other Siebel applications.

To enable a drill-down destination, the following criteria must be met:

- The source applet must be based on one of these specialized frame classes:
  - CSSFrameListFCDDn
  - CSSFrameListNoData
  - CSSFrameUrl
- A drill-down object must exist as a child of the source applet with a valid View attribute (the destination view).
- The destination view must be included in the license key for your installation.
- The destination view must be included in the Responsibility for the logged in user.
- The destination view must be included as a Screen View in the SI Drilldown Destinations Screen.



Your Siebel eBriefings application is configured to collect news and company data from Siebel eContent Services and display it to your employees. You can also configure Siebel eBriefings to collect and display data from other Web-enabled resources, such as your existing subscription services. This involves modifying and defining objects using Siebel Tools and defining content agents using the Integration Administration views from the Site Map.

This chapter describes how the Content Broker feature in your eBriefings application allows you to integrate external content. Customers who have subscribed to Siebel eContent Services can review the steps for setting up the preconfigured process. The chapter also walks you through the process for configuring eBriefings to display data and information from other external sources. The fictitious company A.K. Parker will be used as an example to show you those elements of configuration that are particularly relevant to Siebel eBriefings. Configuration is discussed only in terms of what is unique to integrating external content with Siebel eBriefings. This guide assumes that you know how to use Siebel Tools and are familiar with configuring Siebel applications.

For more information about Siebel Tools and Siebel configuration concepts, see *Siebel Tools Reference*. For more information about configuring Siebel applications, see *Siebel eSales Administration Guide*.

This chapter covers:

- Content Broker
- Defining content agents
- Connecting to eContent Services
- Configuring eBriefings to display external content
- Building content agents for company vocabulary

# About Content Broker

Content Broker is the feature in eBriefings that allows you to integrate and display content from Siebel eContent Services or any external source that is properly configured. This content appears in context with your Siebel data. For example, when a user opens an Account Briefing for an account such as Acme, Inc., in addition to account data from their Siebel database—opportunities, contacts, service requests—the user also sees recent news articles related to Acme, Inc. Content Broker searches external sources, finds information related to Acme, and displays it in context with Acme data from the Siebel database.

Content Broker involves three components:

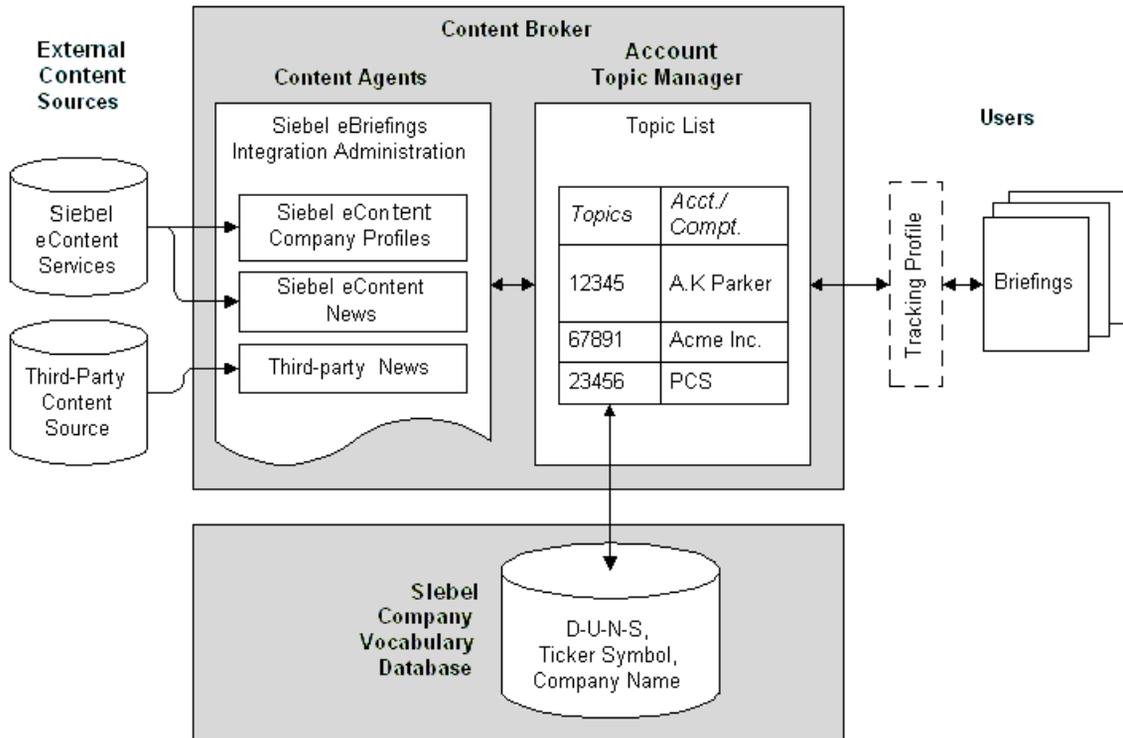
- **The Account Topic Manager.** The Briefings Administration view that allows you to link accounts and competitors to topics. Topics are what Content Broker uses to search external content sources, such as Siebel eContent Services. Siebel has adopted the D&B D-U-N-S Number as the topic identifier for companies. When you link accounts and competitors to topics, you link them to the D-U-N-S Number. Siebel eBriefings uses the D-U-N-S Number when searching external content sources.

For more information on using the Account Topic Manager, see [“Associating Accounts with Topics” on page 70](#).

- **Content Agents.** Defines authentication, URL, and syntax parameters needed for requesting information from external sources. Content agents for Siebel eBriefings are configured to collect news and company profiles distributed by Siebel eContent Services. You can also create your own content agents for other external content sources.

For more information on content agents, see [“Defining Content Agents” on page 40](#).

- Siebel Company Vocabulary.** Siebel Systems hosts this database of company identifiers based on D&B D-U-N-S numbers. For each D-U-N-S Number in the Company Vocabulary table, Siebel Systems also maintains other company identifiers, such as the stock ticker symbol for public companies. Figure 3 shows a conceptual view of the Siebel Content Broker.



**Figure 3. Conceptual View of Content Broker**

Content Broker provides the structure for you to integrate your own external content. It allows you to define content agents and use Siebel Tools to configure Siebel eBriefings objects to be able to request data from external sources. Defining content agents in the Integration Administration views gives you the flexibility to change the agents without having to recompile the Siebel repository (.srf) file or reboot the server.

# Defining Content Agents

This section provides you with an overview of the Content Agent component of the Content Broker feature in Siebel eBriefings. Content agents allow you to request information from Siebel eContent Services or other external sources that you would like to integrate with eBriefings.

## Understanding Content Agents

Content agents define the authentication, URL, and syntax parameters required to submit requests to an external content source. These are defined using the following three Integration Administration views from the Site Map:

- **Host Administration.** Specifies the name of an external host, its virtual name, the authentication type, and the credentials that are used to access the host. You specify the credentials in the Authentication Value field as *username:password*. Customers who subscribe to Siebel eContent Services should refer to [“Connecting to eContent Services” on page 42](#) for more information on setting up host and authentication credentials.
- **Symbolic URL Administration.** Defines the names of symbolic URLs that are used to request information from external content hosts. This is also where you define the syntax, arguments, and required arguments for the content search. The symbolic URL name is defined as the calculated value of the business component’s field. See [“Configuring a Business Component to Handle External Data” on page 49](#).
- **Fixup (Content) Administration.** Defines the link target and view that will display the link. This allows you to control how content is displayed, such as inside an applet. The Content Fixup Name updates a relative link with the server name and other necessary information.

## How Business Components Map to Content Agents

Business components refer to content agents when making requests to external content sources. They refer to the content agent using the calculated value of the business component’s field.

Figure 4 shows the fields and calculated values for the SI Account External business component. This business component is preconfigured to request data from Siebel eContent Services. Notice that the CompanyNews field contains the calculated value AccountNews.

Fields					
W	Name	Changed	Calculated	Calculated Value	Join
	CompanyAdditionalInfo		✓	*AccountAdditionalInfo	
	CompanyNews		✓	*AccountNews	
	CompanyProfile		✓	*AccountProfile	
	CompanySubsidiaries		✓	*AccountSubsidiaries	
	DundNum				S_ORG_EXT

Figure 4. SI Account External Business Component Field Properties

In Figure 5, you can see that AccountNews is the same as the Symbolic URL name defined in the Integration Administration > Symbolic URL Administration view. The calculated value of the business component’s field matches the name of the symbolic URL. The Symbolic URL Administration view stores the information that the Web Integration Business service uses to build an HTTP request to an external content host.

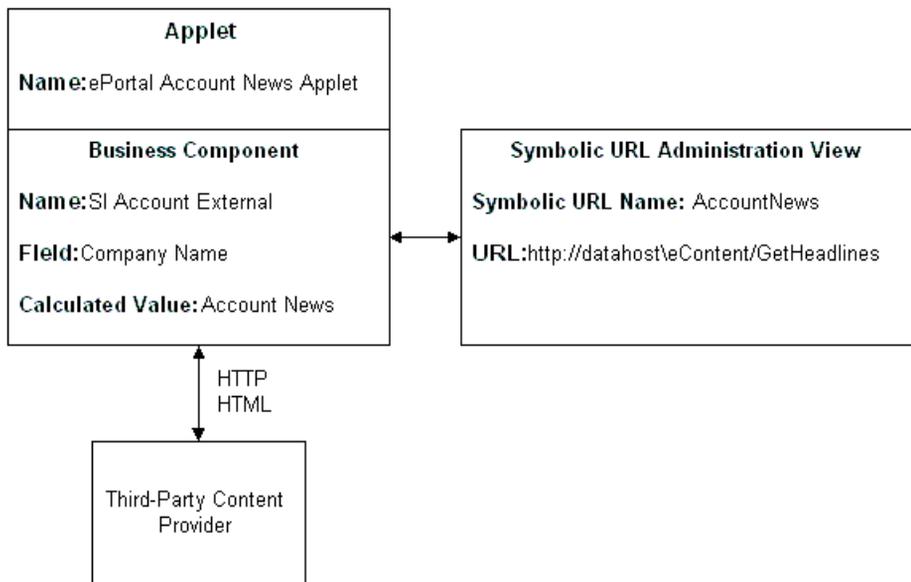


Figure 5. Relationship Between Business Components and Content Agent

# Connecting to eContent Services

Siebel eBriefings supports preconfigured integration with Siebel eContent Services. Customers who subscribe to Siebel eContent Services must set up the host and authentication credentials required to connect to the eContent Services host. The Symbolic URL and Content Fix-up Administration views are preconfigured. D&B business and credit reports are a separate service. Instructions for accessing these are provided in [“Adding D&B User Credentials” on page 33](#).

## Setting Host and Authentication Credentials

During the installation of the Siebel Server you will be asked if you have purchased Siebel eBriefings, Siebel eBriefings and Siebel eContent Services, or neither. When you select either Siebel eBriefings or Siebel eBriefings and Siebel eContent Services, you will be asked to enter the assigned content host name, user name, and password that allows you to access the hosted data with the Siebel application. This data consists of company profiles, corporation relationship information, premium external news feeds, and productivity content from leading content producers and providers.

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**NOTE:** The host name, user name, and password credentials are provided in the license key letter distributed to each customer upon purchase.

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### **To set host and authentication credentials**

- 1** In the Site Map, navigate to Integration Administration and click Host Administration.
- 2** Click New or modify the default entry provided in the host table.

- 3** In the HTTP Host applet, provide information in the following fields:

<b>Field</b>	<b>Comments</b>
Name	Provide a name for the external host. Change the host entry [ServerName] to the eContent host name provided in your letter.
Virtual Name	A virtual name for the external host. This information is provided.
Authentication Type	Set authentication type to NCSA Basic.
Authentication Value	Enter the authentication value in the format <i>username:password</i> as shown in your letter.

- 4** Restart your server.

# Siebel Industry Content Services and Additional Language Content Services

If you want to access additional language Content Services or if you have purchased one or more Siebel Industry Content Services, you must make configuration changes to include content from these services in existing or new applets.

### To add Industry and Language Content Services to your eContent Services base

- 1 In the Site Map, navigate to Integration Administration and choose Symbolic URL Administration.
- 2 Select the following three symbolic URL names that must be updated:
  - CompanyNews
  - OurCompanyNews
  - EmployeeCombinedNews
- 3 Add the argument value (for example, *argument\_value*) for the additional content services to your PKG argument for each symbolic URL.

Symbolic URL Name	URL	Argument Name	Required	Sequence Number	Argument Type	Argument Value
Company News	http://datahost/eContent/GetHeadlines	PKG	Y	1	Constant	namuk,french,italian,german,spanish, <i>argument_value</i> , <i>argument_value</i>
OurCompany News	http://datahost/eContent/GetHeadlines	PKG	Y	1	Constant	namuk,french,italian,german,spanish, <i>argument_value</i> <i>argument_value</i>
Employee Combined News	http://datahost/eContent/GetHeadlines	PKG	Y	1	Constant	namuk,french,italian,german,spanish, <i>argument_value</i> , <i>argument_value</i>

---

**NOTE:** If you have subscribed to multiple content services, add these services as a comma-separated list, for example, `namuk,french,italian,german,spanish,argument_value,argument_value`. You must include the content service names `namuk`, `french`, `italian`, `german`, and `spanish` to retain content from the base Siebel eContent Service.

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The argument values you can add to `namuk`, `french`, `italian`, `german`, and `spanish` for each of the nine additional industry options are provided in the following table.

Content Services Options	Argument Value
Siebel eContent Services	<code>namuk, french, italian, german, spanish</code>
Siebel Automotive Content Services	<code>auto</code>
Siebel Consumer Goods Content Services	<code>cgoods</code>
Siebel Energy Content Services	<code>energy</code>
Siebel Finance Content Services	<code>financ</code>
Siebel High Tech Content Services	<code>hitech</code>
Siebel Insurance Content Services	<code>insure</code>
Siebel Pharma Content Services	<code>pharm</code>
Siebel Public Sector Content Services	<code>pubsec</code>
Siebel Telecom Content Services	<code>telecm</code>

---

**NOTE:** `Namuk` is a news package that includes North America, United Kingdom, and all other English language international publications. `Namuk` is supported in the base eContent Services product. You can also support other international language and news publications, such as French, Italian, German, and Spanish language publications, using the base eContent Services product. Please contact your Siebel representative for more information on these news packages.

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# Configuring eBriefings to Display External Content

To integrate external content into Siebel eBriefings, you use Siebel Tools to configure applets and business components so that they can handle external content. This section describes some issues you should consider before you configure, and provides an overview of common configuration scenarios. Four main configuration tasks you must complete using Siebel Tools are explained:

- Configuring a business component to handle external data
- Configuring an applet to display external data
- Modifying the table of contents applet
- Adding the applet to a view

Instructions for creating content agents to request external data are also provided in this section.

## Before You Configure

Before you begin, you need to consider the following:

- Your external content provider must have an HTTP/HTML interface.
- You need to know the search terms and any other parameters you need to pass to the content source to retrieve data. For example, does your content source index company information by D-U-N-S Number, stock ticker symbol, or company name?
- You must define what data you want to display and where you want it to appear. For example, do you want to display headlines on the user's My Briefings page, or do you want to display headlines and abstracts of articles on the Account Briefing?

## Configuration Scenarios

There are three scenarios that characterize how you might integrate external content into your Siebel eBriefings application. They describe the type of request that Content Broker places when retrieving data from an external source. The scenarios are listed here in order of complexity. Static is the least complex, and vocabulary is the most complex.

- **Static.** In this scenario, Content Broker simply places a static request to an external content host and displays the results in a section of a Briefing document. The elements of the request do not change, and no data from the Siebel database is required.

For example, suppose A.K. Parker Distribution wants to display current headlines about the high-tech industry on users' My Briefing pages. A.K. Parker could configure Siebel eBriefings to search an external data host, say TopNews.com, for articles using the search term "high-tech" and limit the search to articles published in the last 5 days. The results could be displayed in a new section called High Tech News.

- **Parameterized.** In this scenario, when Content Broker places a request to an external data host, it passes data from your Siebel database as a parameter. Siebel data might include the company name, SIC code, or company's address.

For example, suppose A.K. Parker Distribution purchases news from an external content host that uses the SIC code as an index. A.K. Parker wants to display account news from this source on Account Briefings. A.K. Parker could configure Siebel eBriefings so that the SIC code for the current account is extracted from the Siebel database and is passed to the content source when the request is made.

- **Vocabulary.** In this scenario, search terms from the Siebel Company Vocabulary database are retrieved and then passed to the external content host when the request is made.

For example, suppose A.K. Parker already subscribes to a news wire called Headline News, and wants to integrate Headline News into the Account Briefing. Headline News indexes company information by stock ticker symbol. A.K. Parker could configure Siebel eBriefings to extract the stock ticker symbol for the current account from the Siebel Company Vocabulary database and pass it to the content host when the request is made.

# Configuration Example

Suppose A.K. Parker subscribes to news from Top News Corporation and wants to integrate it into its Siebel eBriefings application by placing a Top News section on the Account Briefing. Top News indexes company news by D-U-N-S Number. A.K. Parker stores a D-U-N-S Number for each account in the Siebel database. A.K. Parker will have to configure its application to extract the D-U-N-S Number for the current account and pass it to the content host when the request is made.

The configuration example of A.K. Parker falls into the parameterized category defined in “[Configuration Scenarios](#)” on page 46. In the sections that follow, this example is used to illustrate the process of integrating external content into your Siebel eBriefings application.

Figure 6 shows a sample external data section. This section is configured to display content from Lexis-Nexis. A.K. Parker would configure a similar section to display content from Top News.

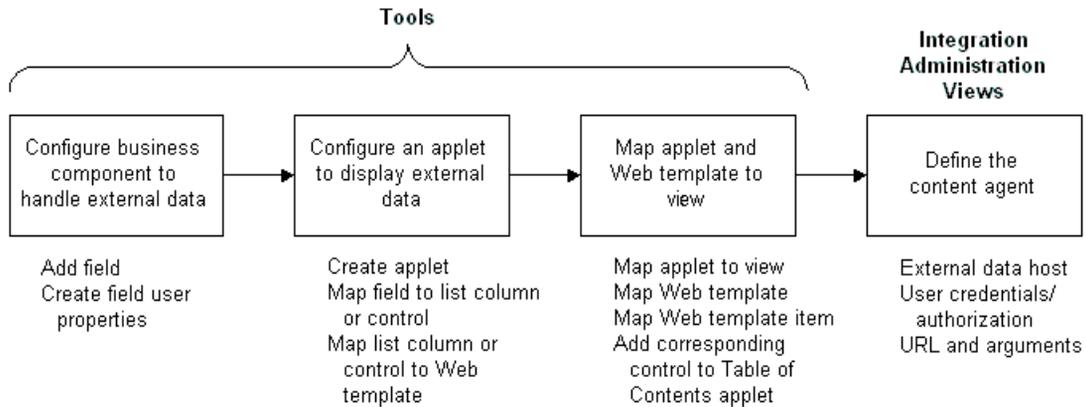


Figure 6. My News Section

## Process Overview

To integrate external content into the Siebel eBriefings application, you need to modify objects using Siebel Tools and define the content agent using the Integration Administration views in eBriefings.

Generally, copying existing objects in Siebel Tools and modifying them to suit your purposes is preferable to creating new objects from scratch. This allows you to use as much preconfigured functionality as possible. [Figure 7](#) illustrates the process of integrating external content.



**Figure 7. Content Integration Process**

## Configuring a Business Component to Handle External Data

External content appears in the Siebel eBriefings application through applets. Applets contain list columns or controls that are mapped to fields in specialized business components. These fields do not represent structured data like records from an RDBMS. Rather, each field represents the HTML results that are sent by an external content provider and displayed in an applet. The first step in integrating external content is to add a new field that represents HTML results to a business component.

## Adding a New Field to a Business Component

In this example, A.K. Parker Distribution wants to include the Top News section on Account Briefings. To do this, A.K. Parker starts by adding a field to the SI Account External business component. This is a custom field that represents the HTML results sent by TopNews.

#### **To add a field to a business component**

To minimize configuration work, copy an existing field that is already configured to handle external data and modify its properties.

- 1 Start Siebel Tools.
- 2 Select Business Component in the Object Explorer.
- 3 Query for SI Account External.
- 4 Copy the Field CompanyNews.
- 5 Rename the new field as TopNews to represent external data and define the field properties.

The following table describes the key field properties related to Siebel eBriefings.

Property	Example Value	Comments
Name	TopNews	Defines the name of the field.
Calculated	4	A check mark in this field indicates that it is a calculated value.
Calculated Value	AccountNews	Maps the business component to the content agent defined in the Integration Administration views.
Column		Leave this field blank.
Join		Leave this field blank.
Multi Value Link		Leave this field blank.

#### **Configuring an Applet to Display External Data**

To display external content on a Siebel eBriefings view, you need to create an applet based on the business component that contains the specialized field for handling external data. See [“Configuring a Business Component to Handle External Data” on page 49](#).

You can configure the applet so that it will not display on the Briefing document when no data is available. After you create the applet, you must map the applet to a Web template, and then define the Web template items.

For example, A.K. Parker can create a new applet by copying the ePortal Account News Applet and naming the copy TopNews.

### To configure an applet

- 1 Create a new applet and define its properties.

The key properties related to Siebel eBriefings are defined in the following table.

Property	Example Value	Comments
Business Component	SI Account External	Applet should be based on the business component that has been configured to handle the external data.

- 2 Add the following user properties to hide the applet when no data is available. This feature is supported by applets with Class = CSSFrameListWeb.

Name	Value	Comments
NoDataHide	Y	If no data is associated with the applet, the applet does not appear on the view.
NoDataRequiredFields	TopNews	The value of this user property must match the name of the field added to the business component.

- 3 Add or modify the list column attributes.

The list column Field attribute must match the name of the field defined on the business component. For example, A.K. Parker would create a list column with a field attribute set to TopNews, because TopNews is the name of the field A.K. Parker defined on the SI Account External business component.

The key list column attributes for Siebel eBriefings are defined in the following table.

Property	Example Value	Comments
Display Name	Top News	Value displays in the user interface.
Field	TopNews	Matches the name of the field defined on the business component.

Property	Example Value	Comments
HTML Display Mode	DontEncodeData	This property must be set to DontEncodeData. Otherwise, the Siebel Web Engine will try to encode HTML results.
Name	TopNews	Name of the field defined on the business component.
Field Retrieval Type	Symbolic URL	Value is equal to Symbolic URL.

#### 4 Associate the applet with a Web template.

The Web template used by Siebel eBriefings for applets displaying external content is:

```
ePortal Url Applet
```

#### 5 Define Web template items.

The Web template item should match the list column property on the applet. Key Web template properties for Siebel eBriefings are defined below.

Property	Example Value	Comments
Item Identifier	501	Maps to < swe:control > tag in the Web template (.swt file).
Name	TopNews	This should match the name of the list column or control on the applet.

## Modifying the Table of Contents Applet

Account, Competitor, and Company Briefings have a table of contents that lists the applets that appear on the page. Applets that contain data are displayed in the table of contents as hyperlinks. Applets that do not contain data are listed in the table of contents but are not displayed as hyperlinks.

The table of contents (TOC) applets for the Account, Company, and Competitor Briefings are named:

```
SI Account TOC Applet
SI Company TOC Applet
SI Competitor TOC Applet
```

Because A.K. Parker is adding its custom TopNews applet to the Account Briefing, A.K. Parker would modify the SI Account TOC applet by adding the name of the TopNews applet.

### To add an applet to a TOC applet

- 1 Select the TOC applet that you want to modify.
- 2 Add a new control to the TOC applet to represent the applet that you want to display in the TOC.

Other than the name, you can accept the default attributes for controls. Note that this control does not map to a field on the business component. It is simply a placeholder for the TOC entry that points to a specific applet. In the example of A.K. Parker, it points to the TopNews applet.

Property	Example Value	Comments
Name	TopNews	The name of the control must match the name of the applet you want to display on the TOC applet.
Caption	TopNews	The caption is displayed in the TOC.

- 3 Select the Applet Web Template called:

```
TOC Items
```

- 4 Add an Applet Web template item to represent the applet that you want to display on the TOC applet.

Property	Example Value	Comments
Name	TopNews	The name of the Web template item must match the name of the applet you want to display on the TOC applet.
Item Identifier	706	TOC applets have three 10-item columns used to display the names of the applets that appear on the page. Web Template Item Identifiers determine the column and sequence of the items on the TOC. <ul style="list-style-type: none"><li>■ 501-510 displays in the left column.</li><li>■ 601-610 displays in the middle column.</li><li>■ 701-710 displays in the right column.</li></ul>
Type	Control	Specifies whether the template is a Symbolic URL.

### Adding the Applet to a View

Next, you need to add the new applet to a view.

For example, because A.K. Parker wants to display TopNews data on the Account Briefing, A.K. Parker adds the TopNews applet to the Account Briefing view.

#### To add an applet to a view

- 1 Add the applet you created to the view where you want it to appear.
- 2 Map the Web template item to the view.

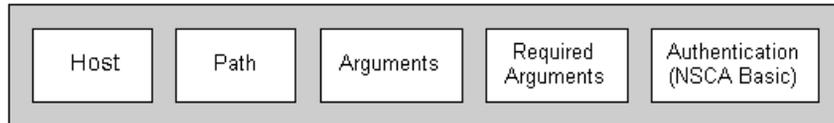
---

**NOTE:** Make sure that the order of the applets on the view is consistent with the order of the controls (applet names) on the TOC applet.

---

## Creating Content Agents

You define content agents in the Integration Administration views. To define the content agent, you need the data host's URL, the authentication parameters, and required arguments. The components of the HTTP request are shown in [Figure 8](#).



**Figure 8. Content Agent URL Components**

For example, A.K. Parker Distribution would define a content agent that has the required information for building an HTTP request to TopNews.com. The content agent would include the D-U-N-S Number as a search term, A.K. Parker's user name and password for the TopNews site, and an argument limiting the number of returned articles.

### To define a content agent

- 1** Navigate to the Integration Administration view and click Host Administration.
- 2** Define the server address and user credentials (user name and password).
- 3** From the Show drop-down list, select Symbolic URL Administration.
- 4** Define the symbolic URL as shown in the following table.

Field	Comments
Name	Enter the name of the Symbolic URL. This is the name of the field user property on the business component.
URL	Enter the external content's URL.
Host Name	Enter the name of the external host. Click the Host Name select button to select a name from a predefined list.

Field	Comments
Fixup Name	Define the link target and view that will display the link. The Fixup Name updates a relative link with necessary information such as server name, and so on.
MultiValue Treatment	From the drop-down list, select the formatting method to use when multiple values are passed. Choose from the following options: <ul style="list-style-type: none"><li>■ Comma-separated</li><li>■ Separate arguments</li><li>■ Use first record only</li></ul>

- 5** Once you have completed the Symbolic URL form, create the content agent definition using the Symbolic URL Arguments applet, as shown in the following table.

Field	Instructions
Name	Enter a name for the argument.
Required Argument	Select the check box if this argument is required in the content agent.  If the Required Argument option is not selected, the URL will not be passed to the content host.
Argument Type	Specify which type of argument this is: BC (business component) and Field, Constant, Field, Language Value, or URL Argument.
Argument Value	Enter the literal value for the argument. Arguments are values from the Siebel database or static text defined as field user properties on the business component. In this example, Max is the maximum number of headlines to be retrieved and MID is the value of the MID field user property (MID is the D-U-N-S Number).
Append as Argument	Select the check box if you want this argument to be appended to the URL. This option provides an easy method for turning on or off an argument.

Field	Instructions
Substitute in Text	Select the check box if you want the argument value to replace a text string.
Sequence #	<p>Enter a number to indicate the relative order of the argument. You can enter the arguments in the form in any order and then use the sequence number to order or reorder the arguments. If you leave these fields blank, the arguments will appear in the same order in which they appear in the form.</p> <p>Number the entries in such a way that you can add arguments as needed at a later time. For example, use a numbering method such as 100, 200, 300, and so on.</p>

## What Happens at Run Time

When a user opens a Briefing document that contains an external data section, the corresponding business component uses the information defined in the content agent to send an HTTP request to an external content source. The external content host sends the HTML results, and the results are displayed in the external data section.

For example, in the case of A.K. Parker Distribution, the following steps describe what would happen at run time:

- 1 The SI Account External business component and the TopNews applet would be initiated. Rows would be created and the applet (data section) would render the list column called TopNews, just as they would if they were displaying data from the Siebel database.
- 2 The specialized field for TopNews would be calculated by:
  - Gathering the URL, required arguments, and syntax.
  - Generating the HTTP request to TopNews.com. For example:  
`http://news.topnews.com/bin/script.asp?DUNS=123456789&MAX=10`
  - Sending the HTTP request to TopNews.

- 3 TopNews returns the HTML results containing the current news articles for the Account.
- 4 The articles about the current account are displayed in the TopNews section of the user's Account Briefing document.

[Figure 6 on page 48](#) is an example of an external content section.

## Building Content Agents for Company Vocabulary

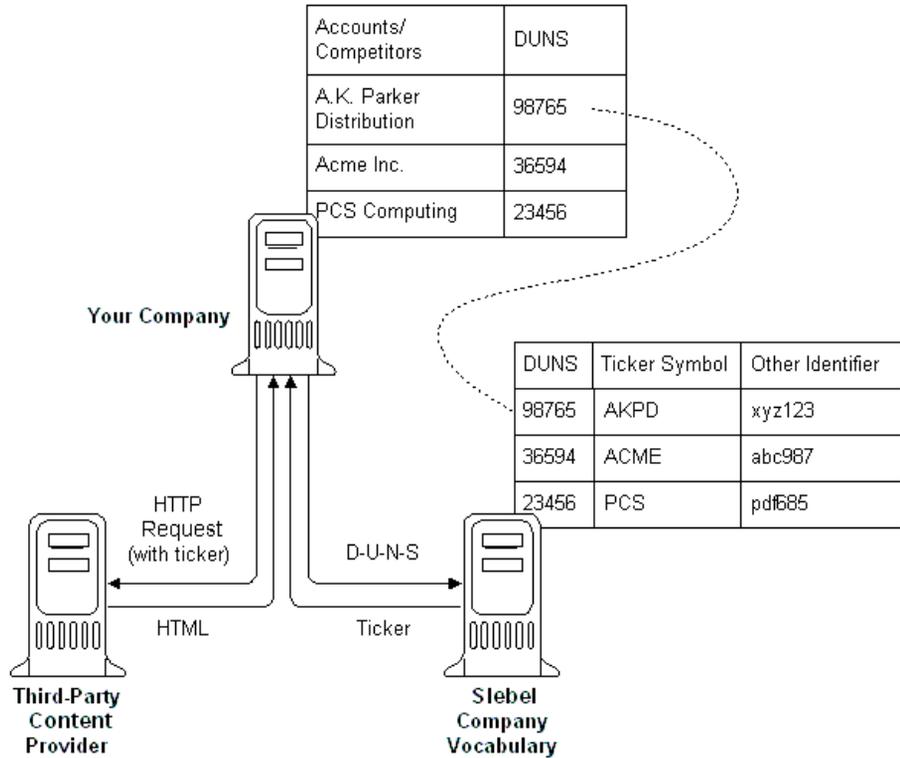
Siebel Company Vocabulary is a database of company identifiers based on D&B's D-U-N-S Number. By linking the accounts and competitors in your Siebel database to D-U-N-S numbers, you also gain access to other identifiers, such as the stock ticker symbol. This allows you to create content agents that can use these company identifiers when submitting requests to external content providers. This is the vocabulary configuration scenario described in [“Configuration Scenarios” on page 46](#).

For example, suppose that the third-party content provider in [Figure 9 on page 59](#) is NewsEdge Corporation. Suppose also that NewsEdge Corporation indexes company information by stock ticker symbol.

You could build a content agent that would pass the D-U-N-S Number to the Siebel Company Vocabulary host. It would pass along with it the URL that you will be sending to NewsEdge. The NewsEdge URL is sent along as an argument and it will be formatted to include search terms from the company vocabulary database.

After the Siebel Company Vocabulary host receives the request, the content agent retrieves the corresponding stock ticker symbol and then includes the stock ticker symbol in the NewsEdge URL. The NewsEdge URL is then sent back to your server.

The content agent evaluates whether to display a link to NewsEdge or to submit a request to NewsEdge for an HTML document. If it's a link, the link is built into a Briefing document. If it's HTML, an HTTP request is sent to NewsEdge. Then NewsEdge returns the requested HTML, and it's displayed in a Briefing page.



**Figure 9. Content Agent for the Company Vocabulary**

For more information about linking D-U-N-S numbers to accounts and competitors, see [“Associating Accounts with Topics”](#) on page 70.

Symbolic URL					
Name	URL	Host Name	Fixup Name	MultiValue Treatment	
AccountNews	http://datahost/eContent/GetHeadlines	host.siebel.com	Default	Comma Separated	
AccountProfile	http://datahost/eContent/GetCompanyProfile	host.siebel.com	Default	Comma Separated	
AccountStockDetail	http://datahost/eContent/GetQuote	host.siebel.com	Default	Comma Separated	

Symbolic URL Arguments							
Name	Required	Argument Type	Argument Value	Argument Value	Append as Argun	Substitute in Text	Sequence #
HIST		Constant	90		✓		1
MAX		Constant	20		✓		2
MID	✓	Field	MIDFallback		✓		3
PKG	✓	Constant	NAMLUK		✓		4
LANG		Language Value			✓		5

**Figure 10. Symbolic URL and Symbolic URL Arguments Lists**

To define a content agent that retrieves data from the Siebel Company Vocabulary database, define the following:

- URL to the Siebel Company Vocabulary host  
GetIncludedURL
- An argument representing the D-U-N-S Number from the Siebel database:

Arg:MID =MID

- An argument representing the URL to your external content source, including:
  - Tokens for the values you want to insert. For example:

`{TICKER}`

- Authorization credentials
- Other arguments

For example:

```
Arg:URL = http://demofour.newsedge-web.com/NewsEdge/  
Headlines?SrchInput={TICKER}&Username=demo&Password=demo
```

- A value for `Arg:INCLUDE`:
  - 1 = HTML
  - 0 = Link to HTML page
- If the value of `Arg:INCLUDE` is 0, then you need to add a value for `Arg:LINKTEXT`.

## **Integrating External Content**

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*Building Content Agents for Company Vocabulary*

This chapter provides information about Siebel eBriefings administration tasks that target information for publication in Siebel eBriefings.

## Managing News Packages

The eContent Services news packages are set up by the administrator in the News Topic Manager view. The administrator determines what news packages will be available to which employees. The administrator also can create news topics for each news package, which are available for end users who have access to the news package. News topics are predefined searches that the end users can choose from. Examples of news topics include: headline stories from the New York Times, software, or a company name, such as Siebel Systems.

The News Topic Manager view is an administrative view in the SADMIN responsibility. You can create your own responsibility for a News Topic Administrator who has this view.

To set up a news topic administrator, create a responsibility that provides access to the News Topics Manager screen, and associate it with the appropriate employee. For more information on creating employee responsibilities, see *Security Guide for Siebel eBusiness Applications*.

## Setting Up Access Groups

Before you configure or create a news topic, you should consider which groups within your organization should have access to news services provided by eContent Services. For example, if your organization has purchased seats of eContent Services for a subset of employees, only those employees should have access to the external content. In addition, depending on the employee's role in an organization, or the types of clients with which the employee works, an employee may need access to specific industry sources and content topics. Rather than configure topics within eContent Services so that the topics are visible to any user, you can configure specific content to specific groups of users. As an administrator, you must associate an access group with a news package when you set up the package. As a result, you should create the appropriate access groups for your topics before you set up eContent Services.

Listed below are general tasks you should complete before setting up eContent Services.

- 1** Make a list of each organization requesting access to each package (for example, specific industry sources and content topics).
- 2** Create a group for each package, unless an appropriate group already exists.
- 3** Associate employees with the access groups used for eContent Services.

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**NOTE:** When setting up a news package, use these access groups to target the package to a specific group of users.

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For more information about setting up groups, see the *Security Guide for Siebel eBusiness Applications*.

## Setting Up News Packages

A News Package is a subscription to a collection of third-party content sources offered by Siebel eContent Services. Your organization may subscribe to several news packages in several different languages. For example, your organization may subscribe to general sources in French, English, or Spanish languages or to specific sources for your industry, such as Finance, High Technology, and Life Sciences. As an administrator, you must set up your Siebel eBriefings application to include content from the news packages to which you subscribe.

### **To set up a news package**

- 1 From the application-level menu, choose Site Map > Briefings Administration > News Topic Manager.
- 2 In the News Packages list, click New and complete the fields for the new record.

The following table describes the fields in the new package record.

<b>Field</b>	<b>Comments</b>
Access Group	Select the access groups that have access to the news package.
Inactive	A flag used by the administrator to control employee access to the content in the news package. By adding a check mark in the field, the news package is inactivated for the associated access groups.
Name	Provide a name for the external news package. It is recommended that you use the package name provided in your letter.
Parameter	Enter the parameter exactly as it is provided in your letter. This parameter indicates to the Siebel Server the precise content to retrieve.

- 3** In the bottom applet, click on the Administrator Defined tab and create news topics. The topics created here by the administrator are displayed for the end user in the My News Topics view, when the user clicks on the Administrator Defined tab.

The Predefined tab shows news topics that come out of the box with news packages. For example, the Finance News news package comes with news topics like Business News: Advertising. As an administrator, you can inactivate news topics. Inactivated news topics do not appear as choices for the end user in the My News Topics view. For more information on creating a news topic, see [“Creating News Topics” on page 67](#)

## Creating News Topics

A news topic is a set of search criteria used to find current news on topics of interest within a news package. [Table 10](#) describes the types of news topics available in Siebel eBriefings.

**Table 10. Siebel eContent Services News Topic Types**

News Topic Type	Comments
Administrator Defined	Siebel Systems allows you to create news topics based on the criteria you specify. News topics that you create in the Administrator Defined view are available to employees within the access groups associated with the news package. Employees with access to the selected news package can choose to include the news topic on a personalized view in the Siebel application.
Predefined	Siebel Systems delivers a predefined set of search topics that allow end users to receive current news on topics of interest to them (based on their tracking profile selections). Search topics include headline news, local and regional news, industry news, business topics, sports, health, and more. The search criteria for predefined topics cannot be modified. The topics can only be inactivated or activated.
User Defined	Siebel Systems allows users who are associated with the appropriate news group to create news topics based on specified criteria. Administrators can view and manage news topics created by users in the User Defined view.

As an administrator, you can create, modify, and delete administrator and user-defined news topics.

### **To create a news topic**

- 1 From the application-level menu, choose Site Map > Briefings Administration > News Topic Manager.
- 2 In the News Packages list, query to find the news package for which you want to create a news topic.
- 3 Click the Administrator Defined tab.

- 4 In the News Topics list, click New, and then complete the fields.

The following table describes the fields for the News Topic record.

Field	Comments
Inactive	Select the check box to inactivate or activate the selected news topic. A check mark appears in this column when the news topic is inactive. Users can select only active news topics in their tracking profile.  If you later mark a user-subscribed news topic as inactive, the user no longer sees news for that topic.
Name	Enter an identifying name for the topic. Users see this text description in the Add News Topics form. If the user selects this news topic, this text also appears as a section heading in the My News section of their My Briefing page.
Query	Enter the query to be submitted in the news topic search. Queries can be expressed as simple words or strings, as is customary with advanced search syntaxes in most search engines. Multiple terms that do not contain a Boolean expression (and, or) are treated as a phrase. Boolean operators (and, or) are recognized. Quote marks can be used to demark a phrase. When an operator occurs within quotes it is treated as part of the phrase.

- 5 Click Preview to see the topic final format.

#### **To edit a news topic**

- 1 From the application-level menu, choose Site Map > Briefings Administration > News Topic Manager.
- 2 In the News Packages list, query to find the news package you want to edit.
- 3 Click one of the following view tabs:
  - Administrator Defined
  - User Defined
- 4 In the News Topics list, query to find the news topic you want to modify.
- 5 Modify the fields as needed.

News topics are preconfigured as active. You can use the News Topics Administration screen to inactivate or activate news topics.

**To activate or inactivate a news topic**

- 1** From the application-level menu, choose Site Map > Briefings Administration > News Topic Manager.
- 2** In the News Packages list, query to find the news topic you want to activate or inactivate.
- 3** Click one of the following view tabs:
  - Administrator Defined
  - Predefined
  - User Defined
- 4** In the News Topics list, query to find the news topic you want to activate or inactivate.
- 5** In the Inactive field, check to make the news topic inactive or remove the check to make the topic active.

# Associating Accounts with Topics

Siebel eBriefings Account Topic Manager allows you to associate the accounts and competitors in your Siebel database with topics. Topics are used by Siebel Content Broker to search external content sources, such as Siebel eContent Services.

Siebel eBriefings uses the D&B D-U-N-S Company Identifier as its standard for company topics. You use the Account Topic Manager to associate accounts and competitors to D-U-N-S numbers. D-U-N-S numbers are a standard way for external content providers to index company information. If you search using an indexed term, such as the D-U-N-S Number, rather than a more generic search term, such as company name, then your search results are more likely to be accurate and relevant.

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**NOTE:** D-U-N-S numbers that have been assigned and populated to an account do not always appear. To find out if the D-U-N-S has been assigned, click the drop-down list for the D-U-N-S field. If the D-U-N-S record has already been assigned, it appears in this drop-down list. Click OK and the D-U-N-S record appears in the field.

---

By associating your accounts and competitors to topics, you also gain access to Siebel Company Vocabulary, which provides access to other common company identifiers, such as its stock ticker symbol. This gives you the ability to configure Content Broker to submit different search terms to different content providers—for example, the D-U-N-S Number to one content provider, the stock ticker symbol to another.

For more information about Content Broker, see [“About Content Broker” on page 38](#).

You can associate multiple accounts from your Siebel database to a single topic. This may be appropriate when external content services consider several accounts in your Siebel database as a single entity. For example, you may have several divisions of Acme Inc. (Acme West, Acme East, and Acme South) listed as unique accounts in your Siebel database, while an external content provider may index news based on the parent company, Acme Inc.

You associate accounts to topics using the Account Topic Manager screen. Access this form by navigating to Briefings Administration > Account Topic Manager on the Site Map.

## Linking Accounts With Topics

For news and company information to appear on the My Briefing page, you must link accounts and competitors in your Siebel database to a topic. D-U-N-S numbers are the standard topics used by Siebel eContent Services to identify companies. You link accounts and competitors to topics using the Account Topic Manager.

### **To create or change a topic association**

- 1 From the application-level menu, choose View > Site Map > Briefings Administration > Account Topic Manager.

The accounts and competitors from your Siebel database are displayed in the Accounts list. Name and Location are read-only. If the company is marked as a Competitor in your Siebel database, there is a check mark in the Competitor column.

- 2 In the Accounts list, query for and select the account or competitor you want to associate to the topic.
- 3 In the Company Search form, query for the account or competitor name in the Company Name field.

Matching records from the Siebel eContent Services company database or your selected external content provider database are displayed. For example, you might see multiple listings of a company because each location or subsidiary might have its own D-U-N-S assigned to allow specific searches on that location or subsidiary.

- 4 In the search results list, choose the specific company you want to define for your account or competitor, and click on the Assign D-U-N-S button.

The corresponding company name and D-U-N-S Number are entered in the Accounts form.

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**NOTE:** If your company has purchased Siebel eContent Services, you can click the  icon next to the company name to open a Company Briefing. If your company has not purchased Siebel eContent Services, the  icon does not appear.

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## Associating a Topic with Your Company

To be able to receive news about your own company in the Our Company section of the My Briefing page, you must associate your company with a topic. To do this, using the Account Topic Manager you associate a record called `_Our Company_` with your company's D-U-N-S Number.

### **To associate a topic with your company**

- 1** From the application-level menu, choose View > Site Map > Briefings Administration > Account Topic Manager.
- 2** In the Accounts list, query for and select the account or competitor you want to associate with a topic.
- 3** In the Company Search list, query for the account or competitor name in the Company Name field.
- 4** In the search results list, choose the specific company you want to define for your account or competitor, and click the Assign D-U-N-S button.

The corresponding company name and D-U-N-S number are entered in the Accounts list for the record that was previously selected.

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**NOTE:** If there is no company news available, the Our Company section does not appear on the My Briefing page.

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## D&B Account Rationalization Services

D&B provides a service that automates the association of account topics by matching your account records to D-U-N-S numbers in batch. A link to D&B's Web site appears on the Account Topic Manager view.

For more information, contact your Siebel sales representative.

## Publishing Literature, Links, and Bulletins

Using the Message Broadcasts and the Literature features, you can publish information in Briefing documents. For example, marketing administrators can publish recent product literature, distribute Web clips, provide links to Web sites, and post bulletins. Users receive this information based on what they have subscribed to in their tracking profile.

For more information about tracking profiles, see [“Tracking Profile” on page 27](#).

### Publishing Literature

You can distribute literature items, such as sales brochures, marketing presentations, and price sheets to a targeted audience of users. When you create a literature record in the Siebel Encyclopedia, you identify the accounts, competitors, industries, and products associated with the contents of the file. Users who have selected those topics in their tracking profile will receive a link to the literature file. When a user clicks the link, the program that was used to create the file opens and the file is displayed.

You can use the My Briefing release and expiration date in the Document Administration > Literature view to control when literature items are posted.

Literature associated with accounts and competitors automatically appears in the literature section of Account and Competitor Briefing pages. Only when the literature items are deleted from the Siebel Encyclopedia will they be removed from Account or Competitor Briefings.

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**NOTE:** Users must have the appropriate applications installed to view literature items. For example, to view .pdf files, the user must have Adobe Acrobat Reader.

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For detailed information about literature, see *Applications Administration Guide*.

### **Publishing Web Clips and Recommended Links**

Recommended links allow you to distribute useful Web pages to users. You can include the linked page in the Web Clips section in-line or as a hyperlink.

When you publish recommended links, you target a specific audience by associating recommended links to accounts, competitors, industries, and products. The recommended link is distributed to users who have subscribed to these topics in their tracking profile. You control the release and expiration date using the Document Administration > Literature view.

#### **To publish a literature item in eBriefings**

- 1** From the application-level menu, choose View > Site Map > Document Administration > Literature.
- 2** In the Literature form, click the menu button and choose New Record.

- 3 Enter the information for the literature record in the More Info applet below the Literature form, as described in the following table.

Field	Comments
Name	Enter a name for the literature record. This text appears as the link in the Literature section of Briefing pages.
Description	Enter a description to help identify the file.
Literature Type	Specify the type of link you are creating. For example, if you are creating a recommended link or Web clip, select Recommended Link. If you are creating a link to a file, select the appropriate type for the file. For example, for a sales presentation, you might select Sales Tool: Presentation. These values are from the Siebel List of Values.
Size	The file size is automatically entered.
File Type	The file type is automatically entered.
Modified	The date and time of the last file modification is automatically entered.
Update File	A check mark in this field indicates that the copy of the literature should be updated automatically each time the original file is updated.
File Name	Enter the name of the file or a URL. URLs must include the protocol, for example, <code>http://</code> .
Synopsis	Enter a summary of the literature item. Text in the Synopsis field appears on the user's My Briefing page. If nothing is entered in the Synopsis field, the contents of the Description field is displayed instead.
Author	Select the author's name from the picklist.

<b>Field</b>	<b>Comments</b>
Web Display	<p>If you are linking to a Web page, use this field to determine how to display it.</p> <p>Frame. Displays a link to the URL. When the user clicks the link, the content is displayed in the current frame (the area under the eBriefing tabs).</p> <p>Window. Displays a link to the Web page. When the user clicks the link, the page is displayed in an expanded window. The user must use the Web browser's Back button to return to Siebel eBriefings.</p> <p>New Window. Displays a link to the Web page. When the user clicks the link, the page is displayed in a new browser window, allowing the user to switch between Siebel eBriefings and the Web page.</p> <p>In-Line. Displays the entire Web page in the selected section of the portal page or pages.</p> <p>Displaying Web pages in-line works best with simple Web pages. Large or complex pages, such as those that use JavaScript, can slow down the system and cause unexpected results. Be sure to test in-line pages before distributing them to users.</p>
Release Date	<p>To post the literature item in users' My Briefing pages, enter a release date.</p>
Expiration Date	<p>To post the literature item in users' My Briefing pages, enter an expiration date.</p>
Distribution Method	<p>Indicates whether or not the file is automatically distributed to all users.</p> <p>Publish. Will send the record to the user and will begin the transmission of the file. If your user does nothing during a synchronization session, the file will download automatically. If your user explicitly skips the file, the file will not be downloaded in that synchronization session. During the next synchronization session, the same thing will happen.</p> <p>By Request. The user will get the record, but not the actual file. The user will have to request the file by selecting the Request field.</p>

Field	Comments
Local	<p>This column is visible only when you are logged in to a local database.</p> <p>Indicates whether or not the document is available on the local hard disk. If a document is not available locally, you can request it by selecting the Request field. The file will be downloaded in your next synchronization session.</p>
Internal	<p>Indicates whether or not the document is about your company and not intended for public distribution (internal). Select the field if the document is internal.</p> <p>Clear the field if the document is about another company (external) or is intended for public distribution.</p> <p>If the literature is internal, it will not appear as a choice in the Enclosure list applet in the My Correspondence Requests view or in the Literature list applet in the Product Detail Administration view.</p> <p>To change this behavior, remove the Search Specification, Internal = "Y" on the appropriate Business Component. For more information on changing Business Components, see <i>Siebel Tools Reference</i>.</p>
Organization	Select the organization to which you want to distribute the literature item.

**NOTE:** If you do not see the field name in the Literature form, click on the applet level menu on the Literature form and select Columns Displayed.

- 4 In the More Info applet below the Literature form, select or add accounts, competitors, industries and products associated with the literature item.

If the literature item is associated with an account or competitor, it appears in the literature section of the Account or Competitor Briefing page.

For users who have included the associated topics on their tracking profile, a link to the literature item appears in the Literature applet on the My Briefing page.

### Publishing Bulletins

Bulletins are internal company broadcast messages that alert users to company announcements. Bulletins appear in the New Bulletins section of the My Briefing page.

#### To publish bulletins on the My Briefing page

- 1 From the application-level menu, choose View > Site Map > Communications Administration > Message Broadcasts.
- 2 In the Message Broadcasts list, click New.
- 3 Enter information for the broadcast message as described in the following table.

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**NOTE:** You must select the Briefing Bulletin check box for the message to appear in the New Bulletins section of the My Briefing page.

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Field	Comments
Severity	Select the Severity of the message: Normal, High, Urgent, or Urgent with Alert. Normal is the least severe and Urgent with Alert is the most severe.
Abstract	Enter the bulletin's title. Text in the Abstract field appears in bold and can be up to 100 characters.
Message	Enter the text of broadcast message. This text appears as the body of the bulletin and can be an unlimited length.
Recipient	To send the bulletin to a specific group of users, click the Select button, and then in the dialog box that appears, select or add the users you want to receive the bulletin.
Division	To send the bulletin to users in a specific Division, click Select button, and then in the dialog box that appears, select or create the Divisions you want to receive the bulletin.
All	Select the All check box to send the bulletin to all users.
Activation Date/Time	Select the activation date/time for the bulletin.  If you do not define these dates, the bulletin is published from the current date until the message is deleted from the Siebel database.

<b>Field</b>	<b>Comments</b>
Expiration Date/Time	Specify the date on which the bulletin will be published and when it expires. If these dates are not defined and the bulletin is flagged for publication, the bulletin is published from the current date until it is deleted from your Siebel application.
Broadcast	Select this check box to make the bulletin available for broadcast.
Briefing Bulletin	Select the Briefing Bulletin check box if you want the bulletin to appear on the scrolling message bar in other Siebel applications. If the bulletin check box is not checked, the bulletin appears only in the Briefing page applet.
Created	The date and time the bulletin was created is automatically entered in this field.
Created By Name	The creator's name is automatically entered in this field.

For more information about Message Broadcasting, see the “Message Broadcasting” chapter in *Applications Administration Guide*.

## Modifying Predefined Queries

Siebel eBriefings includes several predefined queries (PDQs) that determine the search specification and the sort order for sections on Briefing pages that retrieve data from the Siebel database.

- Sort specification is a conditional expression that determines the sort order of retrieved records.
- Search specification is a conditional expression that determines the set of records retrieved.

There is one predefined query for each of the main business objects in Siebel eBriefings. The names of the PDQs and the corresponding Briefing pages are included in [Table 11](#).

See *Siebel Tools Reference* for more information about search and sort specifications.

**Table 11. Siebel eBriefings Predefined Queries**

PDQ Name	Briefing	Business Object
Account	Account Briefing	ePortal Account
Competitor	Competitor Briefing	ePortal Competitor
My Briefing	My Briefing	SI Employee

The example PDQ below is for My Briefing. Notice there are entries for each Siebel data section on the Account Briefing.

```
'Contact'.Search = "[Row Status]='Y' and [Created]>=(Today()-365)"
'Contact'.Sort = "Last Name, First Name"
'Account'.Search = "[Row Status]='Y' and [Created]>=(Today()-1000)"
'Opportunity'.Search = "[Created]>=(Today()-365) and ([Opportunity Sales Status]='Open' or [Opportunity Sales Status] IS NULL)"
'Opportunity'.Sort = "Row Status (DESC), Revenue (DESC)"
'SI Service Request'.Search = "([Status]<>'Closed' and [Status]<>'Cancelled') and [Created]>=(Today()-365)"
'SI Service Request'.Sort = "Status, Severity"
'SI Broadcast Message'.Search = "([Activation Date/Time] is null or [Activation Date/Time] <= Timestamp()) and ([Expiration Date/Time] is null or [Expiration Date/Time] >= Timestamp()) and ([All]='Y' or ([Msg Postn Id] = PositionId()) or ([Bcast Postn Id]=PositionId())) and [Via Interactive]='Y'"
'SI Broadcast Message'.Sort = "Created (DESC), Abstract"
'ePortal Literature 1'.Sort = "Sequence"
```

```
'ePortal Literature 2'.Sort = "Sequence"  
'ePortal Literature 3'.Sort = "Sequence"  
'Expense'.Search = "([Status] = LookupValue('EXP_STATUS','In Progress')) or  
([Status] = LookupValue('EXP_STATUS','Accepted')) or ([Status] =  
LookupValue('EXP_STATUS','Submitted')) or ([Status] =  
LookupValue('EXP_STATUS','Approved')) or ([Status] =  
LookupValue('EXP_STATUS','Rejected')) or ([Status] =  
LookupValue('EXP_STATUS','Next Approved'))"  
'Expense'.Sort = "Submitted Date (DESCENDING)"
```

You can modify PDQs using the Predefined Query Administration view. This view is available by selecting Site Map > Application Administration > Predefined Queries.

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**NOTE:** Modifying a PDQ in the Predefined Queries view changes the query for all users.

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Be sure to make a backup copy of the original predefined query that comes with Siebel eBriefings.

For more information about entering and modifying PDQs, see *Applications Administration Guide*.

For information about search and sort syntax, see the appendix about operators, expressions, and conditions in *Siebel Tools Reference*.

# Supporting Plug-Ins and Viewers

Plug-ins and viewers make it possible for users to access and work with files created using a software application such as Microsoft Word or Adobe Acrobat when the full software application is not installed on the user's computer.

You need to make sure that your users have the plug-ins and viewers necessary to work with all the types of files they need to access and to work in Siebel eBriefings and in Siebel eBusiness Applications.

# Supporting Selection of News Topics

When users first set up their briefing page, they can customize the news topics displayed using the My News Topic view. This view allows the user to customize the following features:

- Select topics from among the topics defined for them by the Administrator. These topics can be specific to their role. To do this, users select a news package in the News Package applet and then click the Predefined and Administrator Defined tab in the bottom applet. They query for a topic, and click Select Topic. The selected topic moves to the My Selected News Topic applet.
- Create their own news topics. The user clicks the User-Defined tab, queries for a name or term for which they want regular news, and clicks Select Topic. The topic is moved to the My Selected News Topic applet.
- Select the order in which the news topics are displayed, using the My Selected News Topic applet.
- Select the number of days and number of headlines to display about the selected topic, using the My News Layout Settings applet.
- Remove any topic from the displayed list, using the My Selected News Topics applet.

All news topics query the eContent database and return any results in the My News applet of the My Briefing page.

## Supporting User Tracking Profiles

When users first begin using Siebel eBriefings, their tracking profiles do not contain the accounts, competitors, industries, or products that they want to track. Users must set their preferences using the tracking profile in order to:

- Receive external and internal news and information about their tracked accounts and competitors.
- Receive literature associated with their preferred accounts, products, competitors, or industries.
- Access market information about selected stocks in the My Stocks section.
- Navigate to Account or Competitor Briefings from the Tracked Account or Tracked Competitor views.

Users can access their tracking profile from the Show drop-down list. They must enter their preferences for each topic in the corresponding applet. For example, they enter accounts to track in My Tracked Accounts. The Tracking Profile view is a read-only summary view.

# Setting Up Synchronization Preferences

Using the Synchronization Manager, users can view eBriefings pages offline. When a user synchronizes, the Synchronization Manager creates eBriefings pages using data from the server database and then downloads them to the Temporary Internet Files folder on the user's computer. These pages are available for the user to view while working offline. Before synchronizing, the user can select which eBriefings pages to download, whether to include linked pages, and whether to follow links to external Web sites.

The eBriefings Synchronization Manager requires the version of Microsoft Internet Explorer listed in *System Requirements and Supported Platforms*.

- 1** Select Synchronize Content from the Show drop-down list on the My Briefing page.

- 2** Select the pages to download.

My Briefing is automatically selected.

- 3** Select the Include linked pages check box to allow the user to follow links from the Briefing page.

Selecting this check box includes links to pages one level down from the Briefing page, such as links to news stories, links to views in the Mobile Web client, and internal recommended links. However, My Briefing does not include links to literature items; Account and Competitor Briefings do not include links to literature items or corporate affiliates.

- 4** Select the Follow links to outside Web sites? check box to enable links to outside Web pages and cache their content for offline viewing.

- 5** Click the Synchronize button.

Based on the selections, the Synchronization Manager downloads the selected eBriefings pages and linked pages and caches them for offline viewing.

The Synchronization Manager is available using Microsoft Internet Explorer as the default external browser. It is not available using a stand-alone browser.

Users can also connect to the Siebel server and synchronize eBriefings pages when they are logged into a server data source.

When users synchronize eBriefings pages, the pages are created from the server database. If the local database is not synchronized with the server database, data on the eBriefings page may not be in sync with data in the local database. For example, a new opportunity may appear on the My Briefing page, but may not exist yet in the local database.

My Briefings, Account Briefings, and Competitor Briefings are available for offline viewing only after synchronizing using the Synchronization Manager. Other eBriefings pages, such as the All Accounts and the All Competitors pages, are not included in the synchronization process. However they may appear in the user's browser while working offline. This is because as a user views these pages, they are cached in the Temporary Internet Files folder on the user's computer. When the browser runs in offline mode, it can open these pages from this location.

Deleting the contents of the Temporary Internet Files folder removes the synchronized eBriefings pages. You must run the Synchronization Manager again to download pages for offline viewing.



This chapter helps you troubleshoot common problems related to Siebel eBriefings, such as:

- Not receiving external news and data in Briefing documents.
- Links from Siebel eBriefings to other views in the Siebel application are not working.
- Users receive too much news in their Briefing documents.
- Literature items and bulletins are out of date.
- News does not appear in the Our Company In The News section on the My Briefing page, but it appears in other sections.
- A 404 Not Found error appears in external data sections of Briefings in the Siebel Mobile Web client.
- Users cannot add new competitors to track.
- Users cannot add news topics.
- The My Briefing view takes a long time to display.
- Selected applets do not appear on the briefing page.

# External News and Data Do Not Appear

Your company has purchased Siebel eContent Services and you are able to access the Web from your workstation, but you do not receive external news and data in Briefing pages. In this case, the problem may be that a proxy server is being used to insulate your network from the Internet and is not allowing the Siebel application to pass requests through and return data to the application.

## Verify Connectivity With Siebel eContent Services Data Host

First verify connectivity with the Siebel eContent Services data host using network utilities, such as:

- ping
- nslookup
- tracert

If you do not know the name of the Siebel eContent Services data host, you can find it in the license key letter that Siebel Systems sent to your company.

## Validate Your Web Connection and User Credentials

Next, verify that you have a valid Web connection and that your Siebel eContent Services credentials are valid.

### *To verify your Web connection and credentials*

**1** Open a Web browser on your Siebel server.

**2** Enter one of the following URLs:

- For eContent customers:

```
http://{eContent_hostname}/eContent/  
GetCompanyNames?FIND=Siebel
```

Change {eContent\_hostname} to the name of your content host.

- For ContentBroker customers:

```
http://{ContentBroker_hostname}/eContent/
GetCompanyMID?FIND=Siebel
```

Change {ContentBroker\_hostname} to the name of your content host.

A dialog box appears prompting you for your Siebel eContent Services user credentials. You can find your user credentials in the license key letter that Siebel Systems sent to your company.

- 3 Enter your user credentials.

Company information about Siebel Systems should appear. If it does, your user credentials are valid. Skip the next step.

If you receive an Access Denied message or other type of message, the proxy server may not be allowing access to the Internet.

- 4 If you have received an error message, try to access the URL using a browser on a machine that does not go through the proxy server or firewall and repeat steps 1 through 3.

If company information about Siebel Systems appears, then the problem lies with the Siebel server passing through the proxy server to retrieve data through the Internet. In this case, please contact your network administrators to resolve the issue.

## Verify Server Configuration

If you could access the Siebel Systems company information using the previous procedure, then the problem may be in the configuration settings for the proxy server or in the Siebel eBriefings server configuration files.

### To test your configuration settings

- 1 Start the twsiebel client in your browser.
- 2 Open a second browser window at the same time and enter the following URL:

```
http://localhost/start.swe?SWECmd=
GotoView&SWEView=SI+Com+Company+Briefing+View&MID=808856512
```

---

**NOTE:** URLs are case-sensitive.

---

- 3 Enter valid login credentials and click Login.

If you have valid login credentials and external content does not appear, this indicates a configuration problem with either the proxy server or within the server configuration file.

If the problem is not resolved after checking your configuration settings, follow the instructions in the next section, and then contact Siebel Technical Support to resolve the issue.

### **Gather Information for Siebel Technical Support**

If you have completed the steps above and cannot resolve the issue, contact Siebel Technical Support. To assist Siebel Technical Support in diagnosing the issue, please gather the following information.

### **Registry Settings for Windows NT Server**

If you are using Windows NT Server, use the following procedure to extract proxy server registry settings.

#### **To copy registry settings**

- 1 Choose Start > Run.
- 2 Open the Registry Editor by typing “regedit” in the Open field.
- 3 Navigate to the following directory:

```
HKEY_CURRENT_USER\Software\Microsoft\Windows\CurrentVersion\
Internet Settings
```

- 4 Copy the contents of the following two keys into a text file:

```
ProxyServer
ProxyOverride
```

- 5 Save the text file to send to Siebel Technical Support.
- 6 Navigate to the following directory:

```
HKEY_USERS\.DEFAULT\Software\Microsoft\Windows\CurrentVersion
\Internet Settings
```

- 7 Copy the contents of the following two keys into a text file:

```
ProxyServer
```

```
ProxyOverride
```

- 8 Save the file to send to Siebel Technical Support.

## News Does Not Appear in the Our Company Section

If news does not appear in the Our Company In The News section of the My Briefing page, but it does appear in other news sections, it is likely that you did not assign an account topic to the special `_Our Company_` record.

For more information about how to do this, see [“Associating a Topic with Your Company” on page 72](#).

## 404 Not Found Error in the Siebel Mobile Web Client

If users receive a 404 Not Found error in external data sections of the Siebel Mobile Web client, then the constructed external URL went to a valid host name but specified a URL path that does not exist. This usually indicates that a Symbolic URL is not correctly defined.

For more information about how to resolve this problem, see [“Defining Content Agents” on page 40](#) and [“Creating News Topics” on page 67](#).

### **Users Cannot Add New Competitors to Track**

Competitors are set up in catalog form to control which employees may see them. If the administrator has not set up a competitor catalog or given catalog access to the employee, the competitor list is not available.

If controlling competitor visibility is unnecessary, the applet visibility can be changed so that all users see all competitors in the database.

### **My Briefing Displays Slowly**

If the My Briefings view is taking a long time to display, users can hide applets they do not regularly view using the Edit Layout feature.

### **Selected Applets Do Not Appear on Briefing Page**

If the user selected an applet to display, such as My Opportunities, and the applet did not appear on the briefing, this indicates there was no data. Briefings applets appear only if data is available.

In the Account and Competitor briefings, users can see if data is available by checking the table of contents. Data displayed with a blue hyperlink is available to the user; data without a hyperlink is not. The hyperlink takes you to the section of the briefing page that shows the applet.

If the desired applet is an applet that accesses the eContent services database, such as Account/Competitor news, but the user does not see news, this may be because no news was available that day. It may also occur if the D-U-N-S numbers were not mapped correctly in the Account Topic Manager view.

## Users Cannot Add News Topics

If the user cannot select news topics in the My News Topics view, you need to verify that news packages were correctly set up and access was provided to the specific user.

## Users Receive Too Much News

If the amount of news and data that is published on a regular basis in Siebel eBriefings becomes too large, you can change the number of days that news and data are published by changing the argument values in the Integration Administration > Symbolic URL view. This will decrease the amount of information by removing older items.

The number of days for which articles are published is controlled by the HIST argument value in content agents. For example:

Symbolic URL Name	URL	Argument Name	Required	Sequence Number	Argument Type	Argument Value
CompanyNews	http://datahost/eContent/GetHeadlines	HIST	N	1	Constant	90

The default setting for HIST is 90 days.

You can also change the number of articles that are displayed. The number of articles displayed is controlled by the MAX argument value in content agents. For example:

Symbolic URL Name	URL	Argument Name	Required	Sequence Number	Argument Type	Argument Value
CompanyNews	http://datahost/eContent/GetHeadlines	MAX	N	1	Constant	20

The default setting for MAX is 20 days.

If users find that they are receiving news and information about too many accounts or competitors, they can reduce their list of tracked accounts and competitors by modifying their tracking profile. Users can also set their preferences for the number of articles displayed and order in which they appear using the My News Topic view.

## Literature and Bulletins Are Out of Date

If a literature item or bulletin is no longer useful or it is replaced by a more recent version and the original item has not yet reached its expiration date, you can change the item's expiration date to the current date. This removes the item from My Briefing pages.

## Synchronize Briefings View Is Blank

Some versions of Microsoft Internet Explorer may cause you to see a blank Synchronize Briefings page. The cause could be related to your Internet Explorer security settings.

Check your Internet Explorer security settings to make sure that the Local Intranet security level is set on Low. In addition, make sure that your ActiveX controls are set to Enable.

### **To view Internet Explorer security settings**

- 1** From the Internet Explorer menu, choose Tools and select Internet Options from the drop-down list.
- 2** Click on the Security tab and choose the Local Intranet Web content zone.
- 3** Click on the Custom Level button to view or change the security settings.

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