SIEBEL 7
eBusiness

SIEBEL *e*MAIL RESPONSE ADMINISTRATION GUIDE

VERSION 7.5, REV. A

12-FAUN7O

MAY 2003

Siebel Systems, Inc., 2207 Bridgepointe Parkway, San Mateo, CA 94404

Contents

Chapter 2. Understanding eMail Response Workflows

Chapter 3. Planning eMail Response Deployment

Chapter 4. Completing Typical Setup Tasks

Chapter 5. Global Deployment Setup and Configuration

Chapter 6. Completing Advanced Setup Tasks

Chapter 7. Troubleshooting eMail Response

Appendix A. Tables and Reference

Index

Introduction

This guide provides information necessary to plan, implement, administer, and maintain Siebel eMail Response.

This book will be most useful to people whose title or job description matches the following:

Email Response Administrators	Persons responsible for planning, setting up, and maintaining Siebel eMail Response and Siebel Smart Answer. They should have a working knowledge of their email client, drivers, Siebel application architecture, and general systems administration.
Siebel Smart Answer Administrators	Persons responsible for analyzing, planning, and implementing Siebel Smart Answer.
Siebel Communications Server Administrators	Persons responsible for understanding how eMail Response makes use of Siebel Communications Server, Siebel Universal Queuing, and other communication touch points.
Other Application Administrators	Persons responsible for planning, setting up, and maintaining any Siebel application to which Siebel eMail Response can be added as a component, for example Siebel Call Center administrators and Siebel eService administrators.
Others with Some Administration Responsibilities	Persons responsible for performing specific Siebel eMail Response tasks, for example creating templates and profiles.
Siebel Application Developers	Persons who plan, implement, and configure Siebel applications, possibly adding new functionality.
Siebel System Administrators	Persons responsible for the whole system, including installing, maintaining, and upgrading Siebel applications.

How This Guide Is Organized

This guide describes the planning and administration of features used to respond to incoming email. It is organized by task, in the sequence in which these tasks typically occur.

Additional Resources

The following books should be used as a companion to *Siebel eMail Response Administration Guide*:

- *Siebel Communications Server Administration Guide*. Siebel eMail Response and Siebel Communications Server share many processes and concepts.
- If you use Siebel Smart Answer with Siebel eMail Response, you will need to use *Siebel Smart Answer Administration Guide* for setup and background information.

Revision History

Siebel eMail Response Administration Guide, Version 7.5, Rev. A

May 2003 Bookshelf

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

Topic	Revision
"Language Support For International Deployment"	Added paragraph about character sets.
"Business Analysis Deployment Planning"	Added a note to Step 6.
"Using Solutions"	Added a note to this section.
"Creating Email Templates"	Added further information to Template Type row and Recipient Group row in table.

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

Topic	Revision
"An Overview of the Processing Flow of Inbound Email Messages"	Added a note to this topic.
"eMail Response Internally Generated Attachment Processing"	Added this topic.

Overview of Siebel eMail Response 1

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

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

- Communications Inbound Manager manages inbound communications with customers. Siebel eMail Response uses the Communications Inbound Manager server component to receive email.
- Communications Outbound Manager manages outbound communications with customers. Siebel eMail Response uses the Communications Outbound Manager server component to send responses.

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

Siebel eMail Response performs the following tasks:

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

Siebel eMail Response Features

This section presents an overview of the following eMail Response features:

Structured and Unstructured Messages

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

Structured Email Processing

Structured email (Web-form) messages are processed using the eMail Response - Process Service Request workflow. You use the Process Service Request workflow for structured or Web-form email messages. These messages are processed for a number of keywords (such as help, query, status, submit, and update), and ultimately a service request is created.

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

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

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

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

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

Keyword-Based Email

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

Web Forms

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

Unstructured Email Processing

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

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

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

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

Responses Based on Service-Level Agreements (SLAs)

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

- Customers with standard agreements can have access to full online support but do not receive any premier services.
- Customers with premier agreements can send an email message and receive an immediate auto-acknowledgment giving the latest date and time that they will receive a response.

Siebel Business Process Designer and Routing and Queuing Methods

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

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

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

  Using the communications toolbar, Siebel Universal Queuing allows agents to work on a combination of call center channels such as inbound and outbound calls, faxes, pages, and email, prioritizing each communication by volume and service level.
- **Custom routing and queuing.** You can design and program your own routing and queuing using Siebel Business Process Designer.

See Table 8 on page 155 for a comparison chart that describes various routing and queuing methods and their advantages and disadvantages. For additional information about eMail Response routing and queuing requirements, see "Revising and Activating Workflow Processes" on page 91 and "Implementing Routing and Queuing Processes" on page 94.

The Spell Check Feature

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

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

Default Dictionary

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

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

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

Personal Dictionary

An agent can add frequently used words to a personal dictionary (custom user dictionary) that is saved on the server so that it is accessible from any workstation the agent uses. These dictionaries are stored in the following location during installation: [ROOT]\bin\[USERNAME&]\[USERNAME_LANGID].tlx.

Siebel Smart Answer (Optional Module)

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

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

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

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

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

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

Multiorganization Features

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

Identifying a Contact Using Their Email Address

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

One Contact With Multiple Email Addresses

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

NOTE: In the Contacts screen, the Never Mail check box applies to all email addresses in this contact record.

Multiple Contacts That Share One Email Address

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

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

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

- One inbound email is routed, if routing is enabled.
- The eMail Response - Update Activity Status workflow process updates the activity status for the contact.
- The eMail Response - Client Send Email workflow process updates the response activity status and inbound activity status for the contact.

Siebel eMail Response Deployment

You can implement eMail Response in the following ways:

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

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

The following topics provide additional information about eMail Response deployment:

- "Designating an Implementation Team" on page 21
- "Implementing eMail Response in an International Environment" on page 22

Designating an Implementation Team

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

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

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

Implementing eMail Response in an International Environment

Siebel eMail Response supports Unicode and the ability to filter templates based on language and locale settings in a single Siebel Systems environment. If you have a Unicode database, each incoming email is converted to Unicode. When eMail Response replies to incoming email, the replies are sent with a Unicode code page. For global deployment resources, see the following list:

Topic	Resource
■ Configuring Siebel software to use multiple languages. For general Unicode information, see the sections about global deployment scenarios.	*Global Deployment Guide*.
■ Siebel eMail Response global deployment setup.	Chapter 5, "Global Deployment Setup and Configuration" in this guide.
■ Supported database code pages.	The server installation guide for your operating system.
■ Supported languages.	*Siebel System Requirements and Supported Platforms* (on SupportWeb).

How Agents Use eMail Response

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

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

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

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

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

NOTE: If you have a Unicode database, each incoming email is converted to Unicode. When agents reply to incoming email, the replies are sent with a Unicode code page.

For more information about how agents use eMail Response, see *Siebel Call Center User Guide*. For more information about Siebel Smart Answer, see *Siebel Smart Answer Administration Guide*.

Working with Siebel Applications

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

- Siebel Sales

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

- Siebel Marketing

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

- Siebel Service

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

- Siebel Call Center

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

Siebel eMail Response Architecture Overview

Siebel Server and eMail Response process incoming emails and handle the replies. Figure 1 illustrates the processes discussed in this section. The outlined area in Figure 1 is shown in detail in Figure 2 on page 28.

1. "Customer Sends an Email" on page 26. A customer may send an email or complete and submit a Web form. This overview focuses on what happens when a customer sends an email.
2. "Siebel Server Components Process Incoming Email" on page 27.
   - Communications Inbound Manager receives the incoming email.
   - Siebel Business Process Designer processes the incoming email, invoking the appropriate routing and queuing process to assign the email to an agent.
   - Siebel eMail Response processes the agent's reply.
   - Communications Outbound Manager returns the reply to the customer.

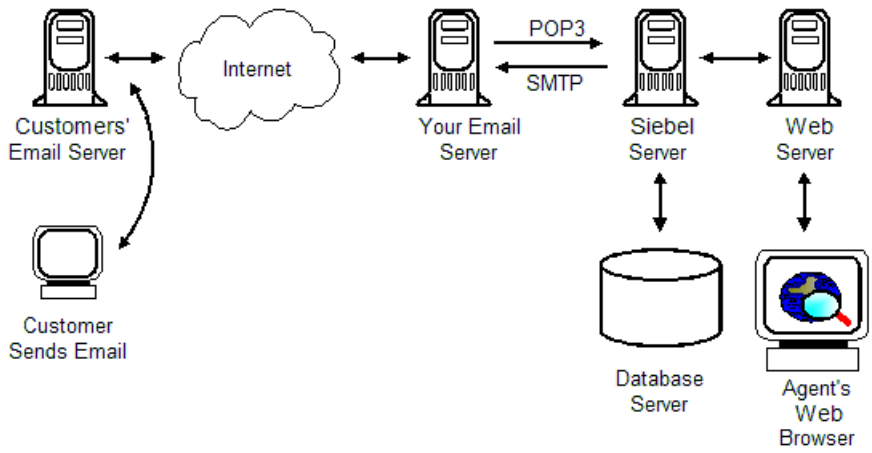

Figure 1. Siebel eMail Response Architecture Overview

Customer Sends an Email

A customer sends your company an email using that customer's email software over the Internet. In this example, the email passes through the customer's email server and communicates with your email server using SMTP/POP3 (Simple Mail Transport Protocol and Post Office Protocol 3) communication protocols.

Communications Inbound Manager uses POP3 to retrieve the inbound message. See Figure 1 on page 25 for an illustration of this process.

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

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

Siebel Server Components Process Incoming Email

Figure 2 on page 28 illustrates the following process. Your email server that is connected to Siebel Server receives the email and passes it to Communications Inbound Manager. Communications Inbound Manager resides on Siebel Server and has a primary role in eMail Response processes. Two Communications Server components manage inbound and outbound email messages. Communications Inbound Manager receives email and Communications Outbound Manager sends responses. Workflow Manager invokes other Siebel Server components such as Assignment Manager, Universal Queuing, Smart Answer Manager, and so on. Communications Inbound Manager uses the Internet SMTP/POP3 Server driver to periodically connect to your email server and check for new email messages. When Communications Inbound Manager detects a new message, it does the following:

- Downloads the message and attachments from the email server.
- Parses elements of the email message (To:, CC:, Subject:, and body content) and places them in memory.

- Passes the email message from memory to the Workflow Process Manager. Communications Inbound Manager can start multiple subprocesses so that multiple instances of a workflow can operate in parallel.

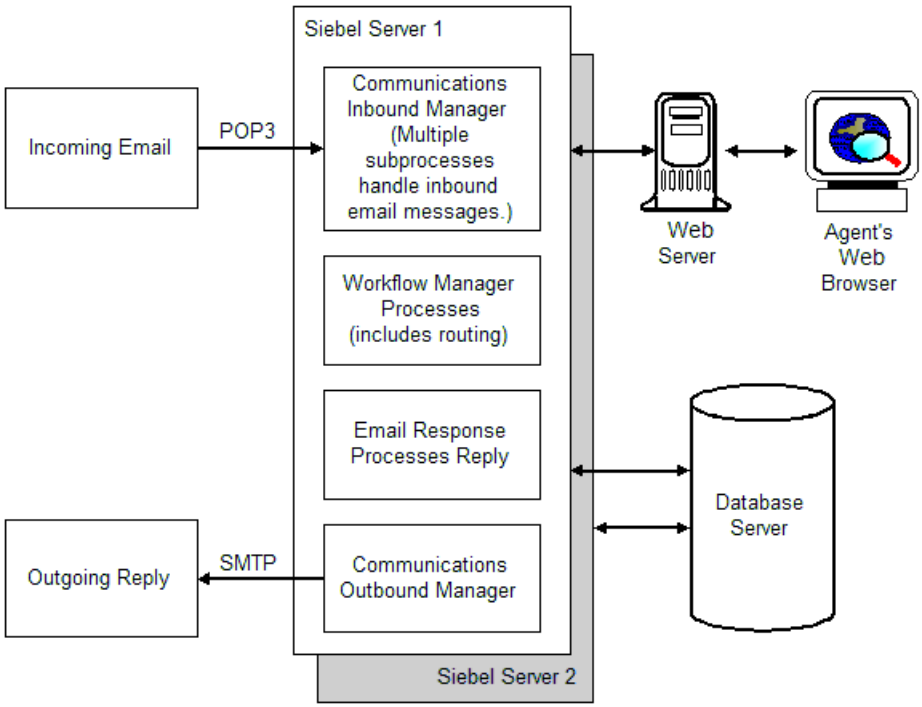

Figure 2. Siebel Server Processes

Processing Incoming Email with Siebel Business Process Designer

In Siebel Business Process Designer the Workflow Process Manager can process the email message in a number of ways, depending on the workflow process you select to handle that type of message. Siebel Systems ships several preconfigured workflow processes that provide email processing features. For more information, see Chapter 2, "Understanding eMail Response Workflows." Workflow Process Manager can be set up to perform the following tasks:

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

Siebel eMail Response Processes the Agent's Reply

The agent reviews the message using the Siebel client and composes and sends a reply using templates configured for your company's needs. See Figure 2 on page 28 for an illustration of this process.

Communications Server Returns the Reply to the Customer

When the agent sends the message, Communications Outbound Manager, a Communications Server component, sends the replies through your email server using SMTP/POP3 communication protocols. Your email server then sends the email over the Internet to the customer's email server and the customer's email server sends it to the customer's mailbox. See Figure 1 on page 25 for an illustration of this process.

Understanding eMail Response Workflows 2

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

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

Siebel eMail Response includes a few preconfigured workflows that route email messages to the right agent at the right time. Preconfigured workflows must be activated before they can be used. For instructions, see "To revise and activate an inactive workflow process" on page 92. To see a list of the preconfigured eMail Response workflows, navigate to the Business Process Administration screen and choose the Workflow Processes view. In the Queries drop-down list, select eMail Response - Inactive.

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

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

eMail Response Workflow Processes

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

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

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

About eMail Response Process Properties

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

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

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

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

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

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

Frequently Used eMail Response Process Properties

You can modify process properties using the following ways:

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

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

In the eMail Response - Process Message workflow, process properties shown in Table 2 can be changed during a typical Siebel eMail Response deployment.

Table 2. Process Message - Frequently Used Process Properties

Name	Default Value	Description
AckTemplateName	eMail Response - Auto Acknowledge	The name of the template used for an Auto-Acknowledgement message.
Catalog Name	KB	The name of the catalog that stores the solutions and templates you use to respond to inbound messages.
CommOutboundMgr Name		The name of the Siebel Server that transmits the outbound message.
Commit Time Entitlement Id		The workflow calculates the appropriate commit time, based on an entitlement.
Enable Assignment Manager	FALSE	If TRUE, Assignment Manager is enabled for email routing.
Enable Test Mode	FALSE	If TRUE, Test Mode is enabled and the workflow can be used in the Process Simulator. The XMLTestFileName parameter must also be specified.
Enable Universal Queuing		If TRUE, UQ is enabled for email routing.

Table 2. Process Message - Frequently Used Process Properties

Name	Default Value	Description
Enable Lookup Sender By Organization	FALSE	If TRUE, contact lookup can be restricted to a specific organization.
Enable Smart Answer	FALSE	If TRUE, Smart Answer is enabled for Auto-Response and Auto-Suggest capabilities.
XmlTestFileName		The file path and file name of the XML file used for Test Mode.

In the eMail Response - Process Service Request workflow, process properties shown in Table 3 can be changed during a typical Siebel eMail Response deployment.

Table 3. Process Service Request - Frequently Used Process Properties

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

Preconfigured eMail Response Workflow Processes

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

- **Message processing workflows**. Executed by the Communications Inbound Manager server component as each inbound message is received. The following are the primary message processing workflows:
  - "eMail Response - Process Message Workflow" on page 37. Use this workflow primarily for unstructured email messages. Each inbound message is processed and ultimately an activity record is created.
  - "eMail Response - Process Service Request Workflow" on page 62. Use this workflow for structured or Web-form email messages. The subject of each inbound message is searched for specific keywords such as update or status. The workflow uses this keyword to call the appropriate subprocess.
- **User interface workflows.** Executed each time an agent clicks specified buttons in eMail Response. The following are the primary user interface workflows:
  - "eMail Response - Response Workflow" on page 75. Invoked by clicking the Reply, Reply to All, and Forward buttons on the My, My Team's, and All Communications screens.
  - "eMail Response - Client Send Mail" on page 76. Invoked from the Send button in eMail Response.

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

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

This chapter provides an overview of each workflow process, describing the most frequently modified processes or steps in these processes. For information about eMail Response business services, methods, and input arguments, see "Siebel eMail Response and Business Services" on page 156.

eMail Response - Process Message Workflow

Unstructured email messages should be processed using the eMail Response - Process Message workflow. The following are the primary features in this workflow process:

- "Test Mode Enabled? (Workflow Decision Point)" on page 38.
- "Find Junk Email (Workflow Subprocess)" on page 43.
- "Parse Message Workflow Steps" on page 46.
- "Create Activity (Workflow Subprocess)" on page 55.
  - Contact Lookup
  - Commit time calculation (entitlement verification)
- "Smart Answer Enabled? (Workflow Decision Point)" on page 56.
  - Identify Language
    - Analyze Message (message categorization)
    - Suggest a reply
    - Automatically respond with a reply
- "Send Acknowledgement (Workflow Subprocess)" on page 58.
- "Route Email or Route Message (Workflow Subprocess)" on page 59.

Figure 3 illustrates these features.

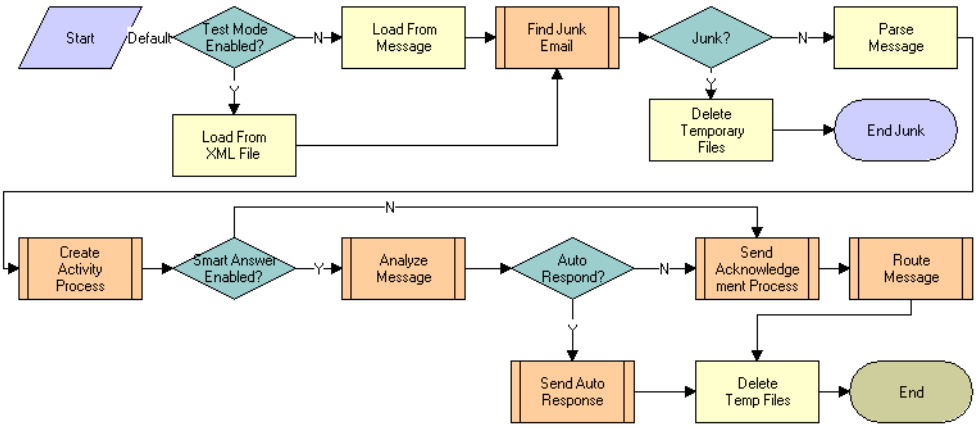

Figure 3. eMail Response - Process Message

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

Test Mode Enabled? (Workflow Decision Point)

After modifying a workflow, test the changes to make sure they are working properly. To use the Process Simulator, the administrator must set up the workflow process to run in Test Mode. To modify and test changes to the workflow process, use the Process Simulator. See Figure 4 for an illustration of this process.

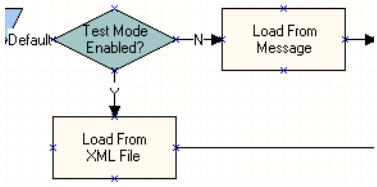

Figure 4. Test Mode Enabled?

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

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

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

To modify test XML files (Example)

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

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

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

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

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

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

5. Use Table 4 on page 40 to modify the required parameters.

6 Save and close the XML file.

Table 4. Output Arguments and Descriptions

Output Argument	Example of a Value	Description
CcList	“replaceme@replaceme.com; test@test.com;casey_cheng@ siebel.com”	Optional. A semicolon-delimited list of email addresses in the CC field of the message, enclosed in double quotation marks.
HasAttach	N	Do not modify.
Loopback_spcCandidate	N	Optional. Changes to Y if the message is identified as a loop-back candidate.
MsgClass	IPM.Note	Do not modify.
OrigMsgFile	c:\testmode\OriginalMessage Text_3B88245D00000001.txt	Optional. A file path pointing to the original message file.
Prefix		Do not modify.
Received	08/25/01 15:20:40	Optional. The time the email server receives the message.
ReceiverAddress	replaceme@replaceme.com	Required. Email address of a working Communications Server Profile on your server.
ReceiverName	replaceme@replaceme.com	Required. Name of a working Communications Server Profile on your server.

Table 4. Output Arguments and Descriptions

Output Argument	Example of a Value	Description
SenderAddress	casey_cheng@siebel.com	Required. Email address of the sender of the message.
SenderAddrType		Optional. Type of sender address.
SenderName	Casey Cheng	Required. The text name of the message sender.
SenderReplyNames	The customer's name	The text name to whom the reply will be sent.
Sent	08/25/01 15:20:26	Optional. The time that the message was sent.
SiebelChannelProfile	replaceme@replaceme.com	Required. Same as the ReceiverAddress.
SiebelChannelType	Email	Do not modify.
SiebelChannelTypeString	POP3SMTP	Do not modify.
SiebelDriverEventName	MsgRead	Do not modify.
SiebelDriverNotifyWhenDone	0	Do not modify.
SiebelWorkItemID	10-3SYAC##998778040:1	Do not modify.
Subject	This is a test subject.	Optional. Text in the subject line of an email message.
TextNote	Fundamentally, computers just deal with numbers.	Optional. The plain text version of the email message body.
TextNoteCharset	us-ascii	Do not modify.
ToList	test2@test.com	Required. Email address to which the message was sent.

To set up the Enable Test Mode process

1. From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Processes.
2. In the Queries drop-down list, select eMail Response - Inactive.
3. In the Workflow Processes list, select the eMail Response - Process Message workflow and click Revise.
4. Click the Process Properties view tab and change the Enable Test Mode process property to TRUE.
5. Select the XmlTestFileName process property, and in the default string field, enter the complete directory path and file name of the test XML file.

   NOTE: You must include the complete directory path to this file.

6. Click the Process Simulator view tab and click Start.

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

Find Junk Email (Workflow Subprocess)

Workflows can be configured to screen out many junk email messages. A junk email message is any message that you do not want to be routed to an agent for processing. Administrators can define keywords in workflow decision steps that detect junk email messages. When identified as junk email messages, the message is not stored in your database and workflow processing stops. Figure 5 illustrates this process.

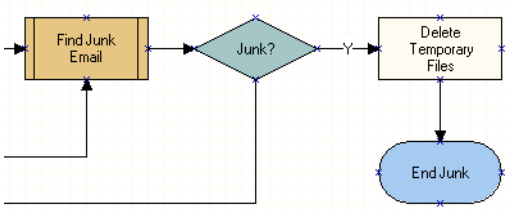

Figure 5. Find Junk Email

Looking for Junk Email

When looking for junk email, eMail Response examines three areas in an email message: the sender field, subject field, and message body. If eMail Response finds the keywords specified by the eMail Response administrator, it flags the message as junk mail. Figure 6 illustrates this process.

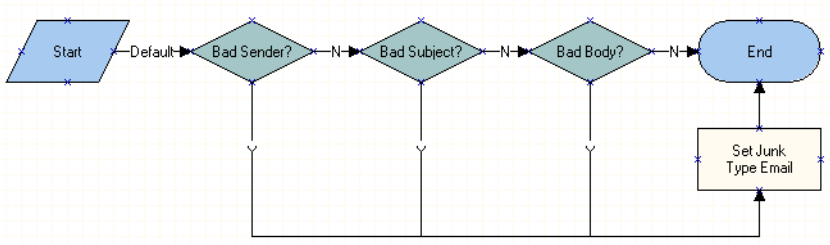

Figure 6. Find Junk Email Subprocess

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

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

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

Adding Keywords to Decision Points

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

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

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

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

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

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

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

To set up junk message processing

1. From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Processes.
2. In the Queries drop-down list, select eMail Response - Inactive.
3. In the Workflow Processes list, select the eMail Response - Parse Junk Email workflow and click Revise.

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

4. Click the Process Designer tab.
5. Double-click the Bad Sender? decision step.

   This example describes adding a keyword to the Bad Sender? decision step. Keywords can also be added to the Bad Subject? and Bad Body? decisions steps, if you want to evaluate them.

6. In the Next Steps list, select the branch name that is equal to Y.

   A defined condition identifies the process property that holds the sender's address.

7. In the Conditions list, create a condition using the following values:

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

8. Add a new record to the Values list.

9 In the Value field, type the address to which a message should be sent when it is identified as a junk email.

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

10 Click the All Processes tab, and click Activate.

11 Test your workflow process by using Test Mode or starting up Communications Inbound Manager and sending test messages.

NOTE: For more information on testing workflow process, see "Test Mode Enabled? (Workflow Decision Point)" on page 38.

Parse Message Workflow Steps

The following are two features used when eMail Response processes email:

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

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

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

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

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

The following are examples of message threading:

- Customer sends a new incoming email message.

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

Please help.
- Customer
```

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

- Company sends response to customer.

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

Attached is the answer to your question.
- Support

[THREAD ID:1234]
```

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

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

```
From: customer@customer.com

To: support@siebel.com

Subject: RE: Help

I already tried that. Any other ideas?

- Customer


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

From: support@siebel.com

To: customer@customer.com

Subject: RE: Help

Attached is the answer to your question.

- Support

[THREAD ID:1234]
```

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

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

Parsing for New Fields

In addition to the preconfigured capabilities of the Parse Message step, the step can be modified so that additional fields can be identified in an email message. Once these fields are extracted from a message, other steps in the workflow can be modified to use these values. One example would be to parse an email message for a campaign code. In email marketing campaigns, a code is often included in the bottom of the email message, so that marketing analysis can be performed. For a description of the Parse Text method and its input arguments, see "ParseText" on page 159.

See the following example of an outgoing marketing message:

```
From: marketing@siebel.com

To: customer@customer.com

Subject: Important marketing message


Please visit our Website www.siebel.com for more information on
Siebel eMail Response.

- Siebel Marketing

[CID:1234]
```

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

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

```
From: customer@customer.com

To: marketing@siebel.com

Subject: RE: Important marketing message


Please have a sales representative contact me. Thanks.
```

```
- Customer


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

From: marketing@siebel.com

To: customer@customer.com

Subject: Important marketing message


Please visit our Web site www.siebel.com for more information on
Siebel eMail Response.


- Siebel Marketing

[CID:1234]
```

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

Example: Parsing Message Text for the Campaign ID

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

To parse text for the campaign ID

1. From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Processes.
2. In the Queries drop-down list, select eMail Response - Inactive.
3. In the Workflow Processes list, select the eMail Response - Process Message workflow and click Revise.

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

4 Add a process property to hold the new value, CampaignId.

5 Double-click the Parse Message step.

6 Add the CampaignId input argument using the following values:

Field Name	Value	Description
Input Argument	CampaignId	The description of the field for which you want to parse.
Type	Literal	
Value	[CID:%s]	An expression that describes the text for which you are looking. The percent (%s) represents the value you want to copy.

7 Add a CampaignId output argument using the following values:

Field Name	Value	Description
Property Name	CampaignId	The name of the Process Property in which you want to store the value.
Type	Output Argument	
Output Argument	CampaignId	This value must match the input argument name you created in Step 6.

8 Click the All Processes tab and click Activate.

9 Test your workflow process by using Test Mode or starting up Communications Inbound Manager and sending test messages.

NOTE: For more information on testing workflow processes, see "Test Mode Enabled? (Workflow Decision Point)" on page 38.

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

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

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

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

Example: Parsing Message Subjects for the Campaign ID

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

To parse message subject for the campaign ID

1. From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Processes.
2. In the Queries drop-down list, select eMail Response - Inactive.
3. In the Workflow Processes list, select the eMail Response - Process Message workflow and click Revise.

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

4. Create a process property for CampaignId.
5. Click and drag a new business service step to the eMail Response - Process Message workflow.

6 Double-click the new business service step, and modify the business service fields using the following values.

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

7 Add the Text input argument using the following values.

Field Name	Value	Description
Input Argument	Text	This is a set input argument for the Parse Text method.
Type	Process Property	
Property Name	MsgSubject	This is the name of the Process Property that stores the text you want to parse.
Property Data Type	String	

8 Add the CampaignID input argument using the following values.

Field Name	Value	Description
Input Argument	CampaignId	
Type	Literal	
Value	[CID:%s]	
Property Name	MsgSubject	This is the name of the Process Property that stores the text you want to parse.
Property Data Type	String	

9 Add a new Output Argument.

Field Name	Value	Description
Property Name	CampaignId	The name of the Process Property where you want to store the value.
Type	Output Argument	
Output Argument	CampaignId	This value must match the input argument you created in the previous step.

10 Click Return to Designer.

11 Use the Connector tool to connect the new step (Parse Subject for Campaign) you created in Step 6 on page 53 to the eMail Response - Process Message workflow.

Create Activity (Workflow Subprocess)

The primary purpose of the eMail Response - Process Message workflow is to convert inbound email messages into activity records. These activity records are reviewed by agents using the Communications screen. The Create Activity step invokes a subprocess workflow, eMail Response - Create Activity, and passes in a number of variables, which create the activity record and perform a number of other steps. See Figure 7 for an illustration of this process.

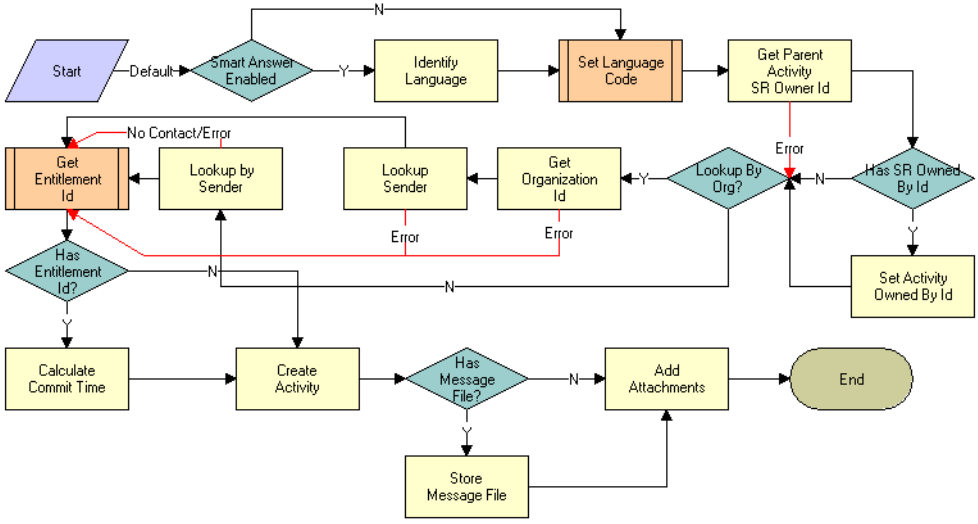

Figure 7. Create Activity Process

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

- **Follow-up messages.** If the original message was associated with an SR, this process returns the Service Request Id and Service Request Owner Id values so that follow-up messages will be associated with the SR.
- **Contact lookup.** The workflow searches contacts in your database to find one with a matching email address. If you set up multiple organizations, the contact lookup can be restricted to a specific organization.

- **Language identification.** Performing a language detection routine on the message, identifying the language of the inbound email message, which is later used to route the message to an agent with the appropriate language skills.
- **Commit time calculation (entitlement verification).** The workflow calculates the appropriate commit time, based on an entitlement.
- **Activity attachments.** The workflow stores the original message and attachments as activity attachments in your database.

For more information, see Chapter 4, "Completing Typical Setup Tasks."

Smart Answer Enabled? (Workflow Decision Point)

One of the key capabilities of Smart Answer is to automatically respond to inbound customer inquiries without human intervention and to automatically suggest answers to an agent who is manually responding to an email message. The eMail Response - Process Message workflow calls several subprocesses that analyze the message and ultimately send an auto-response message back to the customer. Figure 8 illustrates this process. For more details about these capabilities, see *Siebel Smart Answer Administration Guide*.

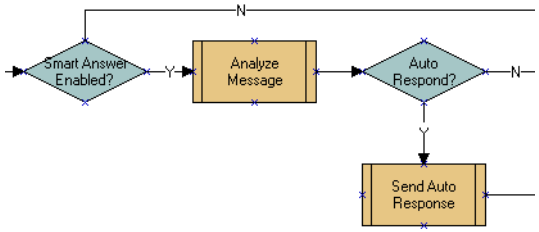

Figure 8. Smart Answer Enabled?

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

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

  - **Auto Respond? decision point (automatically respond to the email).** An auto-response message is sent when each of the following events occur:

    - The Analyze Message subprocess returns matching categories that exceed the accuracy levels established by the administrator.
    - The message is not a follow-up message.
    - The message is not a loopback candidate. eMail Response identifies a loopback candidate by determining how many messages have been received from a particular email address in a given period of time. For more information, see information about driver parameters for the Internet SMTP/POP3 Server communications driver in *Siebel Communications Server Administration Guide*.

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

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

Send Acknowledgement (Workflow Subprocess)

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

The Send Acknowledgement Process calls the eMail Response - Send Acknowledgement step. This step sends a customer an email notification stating that the customer's message has been received. After the acknowledgement message has been sent, the inbound message is routed to an agent for further review. Figure 9 illustrates this process.

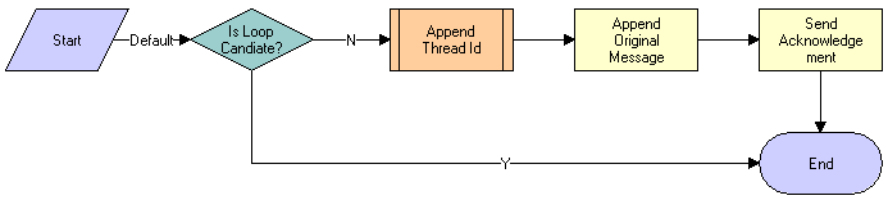

Figure 9. Send Acknowledgement Subprocess Steps

Route Email or Route Message (Workflow Subprocess)

Email messages usually are routed to agents by setting the Owned By field in the Activity record, allowing an agent to see the message in their Inbound Item List view. New email messages and follow-up email messages are routed differently. Follow-up messages from a customer contain a thread ID, new messages do not. The routing and queuing methods you use to identify the correct agent are other Xfactors that determine how messages are routed. Figure 10 illustrates this process.

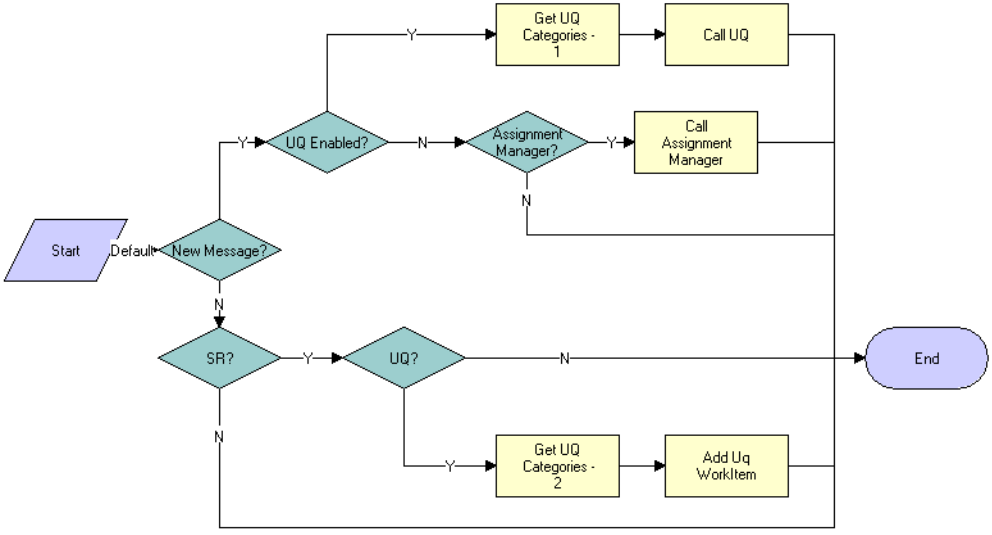

Figure 10. Route Email (Route Message) subprocess

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

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

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

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

- **Universal Queuing.** If the Enable UQ Process Property is TRUE, Siebel Universal Queuing routes the message to the appropriate agent or queue, based on the channel, routing, and escalation criteria you define.

  UQ routes new messages based on a prioritized list of the incoming email channels. For each email channel defined, there might be one or many corresponding routing and escalation rules that route the message based on a fully configurable range of criteria, including message category, message language, and employee skill.

- **Assignment Manager.** If the Enable Assignment Manager Process Property is TRUE, Siebel Assignment Manager assigns messages to the appropriate agent. Using assignment rules and criteria, Assignment Manager assigns specific activities to employees based on their skills, competencies, and other email assignment attributes. Assignment Manager can assign emails to employees dynamically, interactively, or by assigning a batch of emails to an agent.

- **Manual routing.** Each new message must be manually routed to an agent.

- **Follow-up message routing.** A follow-up message is an incoming email message containing a thread ID. By default, a follow-up message is routed to the agent who handled the original email message. For example, if Casey Cheng was routed the initial email message, the follow-up message will be routed to Casey Cheng if the thread ID is detected in the response from the customer. However, if the agent escalated the email message to a Service Request (SR) and assigned the SR to a different person, the message will be routed to the SR owner, not to the original email owner.

  - **Universal Queuing.** If the administrator has set the Enable UQ process property to TRUE, follow-up messages can be routed using UQ, although in a different way from new messages. For follow-up messages, we know to whom the message should be routed (the person who handled the initial message or the SR owner) and UQ notifies the agent using the communications toolbar. For new messages, UQ uses key skills to determine the agent who should receive the email message, and then displays the message to that agent.

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

  - **Assignment Manager.** If the initial agent is not available then Assignment Manager can route the email to another agent capable of handling the message based on the defined assignment criteria.

  - **Manual routing.** Each follow-up message must be manually routed to an agent.

eMail Response - Process Service Request Workflow

Structured or Web-form messages should be processed using the eMail Response - Process Service Request workflow. The eMail Response - Process Service Request workflow attempts to identify a contact record that matches the sender's email address and processes the messages by identifying a keyword at the beginning of the subject line of the inbound email message. The other words in the subject line are ignored. Figure 11 illustrates this process.

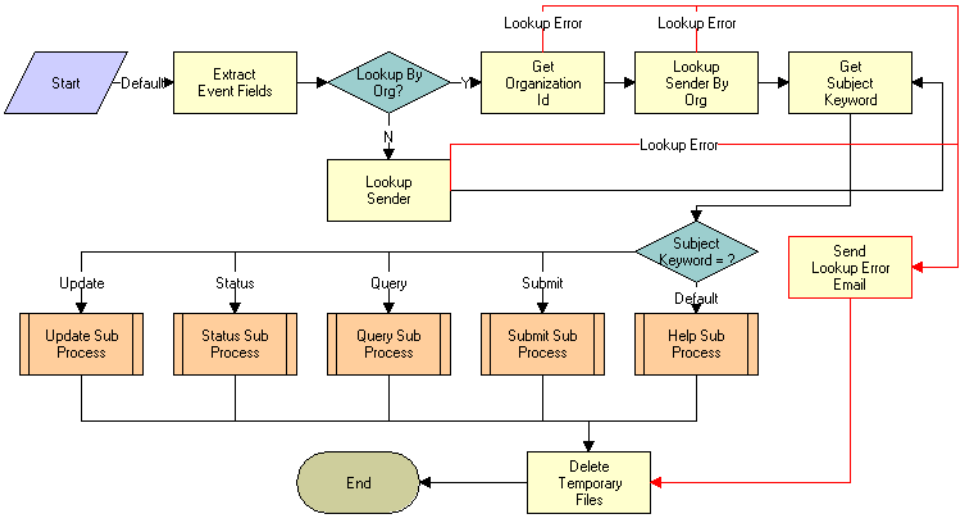

Figure 11. eMail Response - Process Service Request

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

- "Lookup By Org? (Workflow Decision Point)."
- "Get Subject Keyword (Workflow Step)."
- Service Request Workflow Subprocesses.

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

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

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

Lookup By Org? (Workflow Decision Point)

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

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

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

Figure 12 illustrates this process.

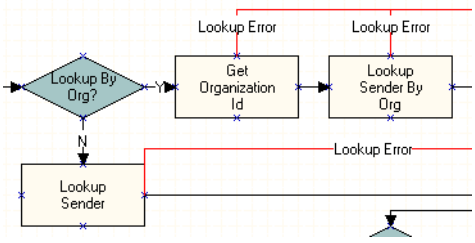

Figure 12. Lookup By Org?

Get Subject Keyword (Workflow Step)

The Get Subject Keyword step takes the text of the subject line and returns the first word in the subject line. The Subject Keyword = ? decision step uses this keyword to call the appropriate Process Service Request subprocess. See Figure 13 for an illustration of this process.

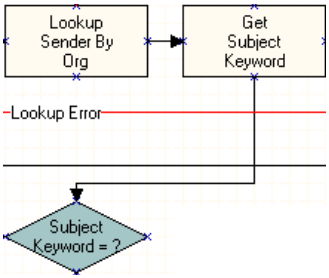

Figure 13. Get Subject Keyword

Submit Sub Process (SR Submit Workflow)

The eMail Response - Process Service Request workflow invokes the eMail Response - SR Submit workflow when the eMail Response - Process Service Request workflow detects the Submit keyword as the first word in the Subject line of an incoming email. See Figure 14 for an illustration of this process. This workflow parses the body of the email message looking for a set of structured fields which will be used to create the SR.

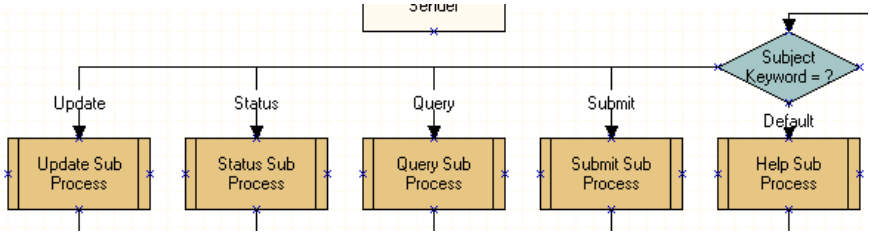

Figure 14. Process Service Request Subprocesses

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

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

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

How the Submit Sub Process Works

After parsing the email message, the workflow looks for an entitlement record, using the Get Entitlement Id subprocess, and calculates a commit time for the SR. For more information, see "Create Activity (Workflow Subprocess)" on page 55.

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

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

```
From: customer@customer.com

To: webform-processor@siebel.com

Subject: Submit


[Severity]

1 - Critical


[Area]

Usage
```

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

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

```
From: webform-processor@siebel.com

To: customer@customer.com

Subject:


Your email has been received.


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

Example: Parsing for Fields in Incoming Email

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

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

To parse for other fields in email

1. From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Processes.
2. In the Queries drop-down list, select eMail Response - Inactive.
3. In the Workflow Processes list, select the eMail Response - SR Submit workflow and click Revise.

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

4. In the Process Properties list, create a new process property called `Priority` in which to store the new field.
5. Double-click the Extract SR Fields step and create a new input argument using the following values:

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

6 In the Output Arguments list, create a new output argument using the following values:

Field Name	Value	Description
Property Name	Priority	The name of the new Process Property that you created in Step 4.
Type	Output Argument	
Output Argument	Priority	The name of the new input argument that you created in Step 5.

7 Return to the Process Designer view.

8 Double-click the Create Service Request business service step in the Submit workflow to add the new field.

9 Add a new input argument using the following values:

Field Name	Value	Description
Input Argument	Priority	The name of the field in the Mail Agent Service Request business component.
Type	Process Property	
Property Name	Priority	The name of the Process Property that you created in Step 4.

10 Activate the workflow process.

Query Sub Process (SR Query Workflow)

The eMail Response - Process Service Request workflow invokes the eMail Response - SR Query workflow when the eMail Response - Process Service Request workflow detects the Query keyword as the first word in the Subject line of an incoming email. See Figure 14 on page 65 for an illustration of this process. This preconfigured workflow parses the body of the email message for a set of structured fields that will be used to find a set of matching SRs.

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

```
From: customer@customer.com

To: webform-processor@siebel.com

Subject: Query


[Severity]

1 - Critical


[Area]

Usage
```

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

```
From: webform-processor@siebel.com

To: customer@customer.com

Subject: RE: Query


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


2-1CR, 12:51 9/13/2001, Open, Assigned, Important issue

2-1CY, 12:51 9/15/2001, Closed, Closed, Very important issue
```

How the SR Query Workflow Processes a Request

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

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

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

Example: Adding Query Fields to the Search Spec Workflow

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

To add query fields to the Search Spec workflow

1. From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Processes.
2. In the Queries drop-down list, select eMail Response - Inactive.
3. In the Workflow Processes list, select the eMail Response - Search Spec workflow and click Revise.

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

   ---

4. In the Process Properties list, create a new process property called `Priority` in which to store the new field.

5 Double-click the Extract SR Fields step and create a new input argument using the following values:

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

6 In the Output Arguments list, create a new output argument using the following values:

Field Name	Value	Description
Property name	Priority	The name of the new Process Property that you created in Step 4 on page 70.
Type	Output Argument	
Output Argument	Priority	The name of the new input argument that you created in Step 5 on page 71.

7 Click Return to Process Designer.

8 Double-click the Get Search Criteria step.

9 Add an input argument, using the following values:

Field Name	Value
Input Argument	Priority
Type	Process Property
Property Name	Priority

10 Click Return to Designer and click Activate.

The workflow has a status of Active.

Update Sub Process (SR Update Workflow)

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

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

```
From: customer@customer.com

To: webform-processor@siebel.com

Subject: Update 2-1CR


Here is the update to my service request.
```

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

```
From: webform-processor@siebel.com

To: customer@customer.com

Subject: RE: Update


Your update has been submitted successfully.
```

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

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

Status Sub Process (SR Status Workflow)

The eMail Response - Process Service Request workflow invokes the eMail Response - SR Status workflow when the eMail Response - Process Service Request workflow detects the Status keyword as the first word in the Subject line of an incoming email. See Figure 14 on page 65 for an illustration of this process.

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

```
From: customer@customer.com

To: webform-processor@siebel.com

Subject: Status 2-1CR
```

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

```
From: webform-processor@siebel.com

To: customer@customer.com

Subject: RE: Status


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


Status: Open

Sub-Status: Assigned

Area: Network

Severity: 1-Critical

Abstract: Important problem
```

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

Help Sub Process (SR Help Workflow)

The eMail Response - Process Service Request workflow invokes the eMail Response - SR Help workflow when the eMail Response - Process Service Request workflow does not detect a matching keyword as the first word in the Subject line of an incoming email. See Figure 14 on page 65 for an illustration of this process. If the system does not find a contact in your database with a matching email address, the system sends an error notification to the sender, stating that a contact was not identified.

eMail Response - Response Workflow

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

NOTE: The Maximum Original Message Text process property controls how much of the original message text will be included in a reply. In the eMail Response - Response workflow, you can set the Maximum Original Message Text process property to a value that is between 100 and 7,500 characters.

Figure 15 illustrates this process.

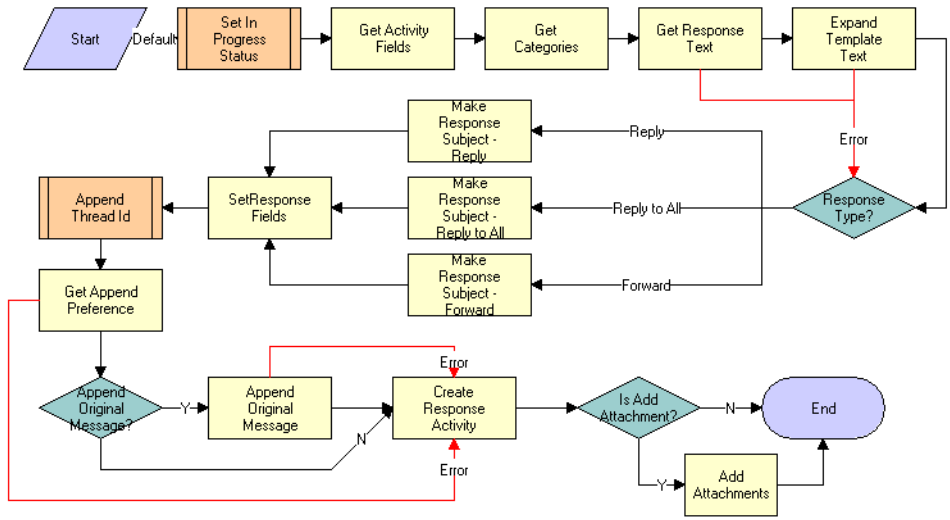

Figure 15. eMail Response - Response Workflow

eMail Response - Client Send Mail

The eMail Response - Client Send Email workflow is invoked by the Send button on the Communications screen. This workflow is responsible for performing message validation steps, updating the status of the inbound message to Done, and sending the email message. If you use the Smart Answer or UQ product, the workflow is responsible for providing feedback to the Smart Answer knowledge base, as well as releasing the UQ work item. Figure 16 illustrates this process.

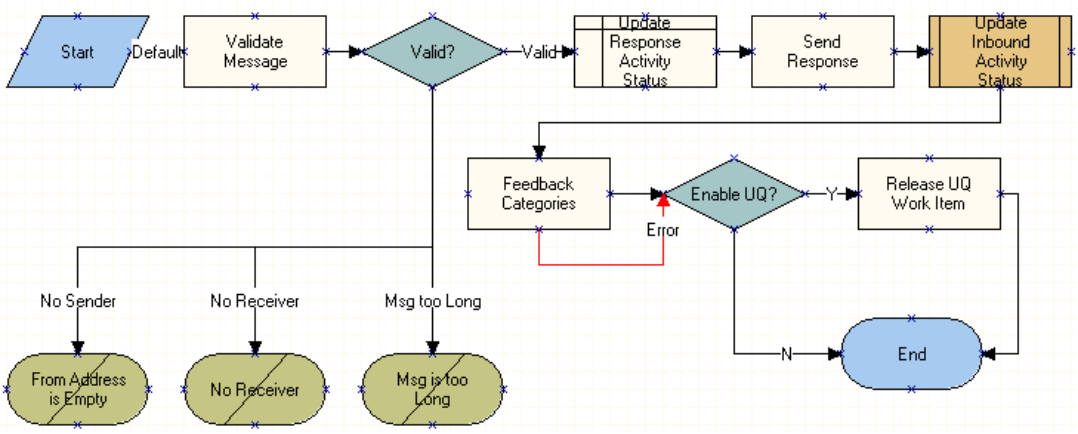

Figure 16. eMail Response - Client Send Email

Planning eMail Response Deployment 3

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

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

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

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

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

Business Analysis Deployment Planning

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

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

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

2 What email addresses will you use for eMail Response?

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

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

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

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

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

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

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

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

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

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

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

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

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

5 What solution documents do you currently use?

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

See "Solutions and Templates Decision Table" on page 154 to find out when to use solution documents (called FAQs in Siebel eService), when to use reply templates, and how each compares to a free-form reply.

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

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

Sort the templates and solutions from Step 4 on page 79 and Step 5 into types of email questions (categories) and assign a category to each solution and template. During eMail Response setup, you will associate solutions and templates with categories so that solutions and templates can be inserted into the body of eMail Response replies.

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

---

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

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

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

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

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

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

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

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

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

When using Siebel eMail Response, you can choose from several methods to route email messages to the correct agent. To review a comparison of different routing and queuing methods, see "Routing and Queuing Methods Comparison Table" on page 155.

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

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

11 Language Support.

a In what languages do your customers send email? In what languages do you reply using email?

b Do you have templates in multiple languages?

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

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

Planning eMail Response Set Up

In this section, you specify additional system information you need for setting up eMail Response. In this section, your goal is to gather system setup information.

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

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

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

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

3 What communications drivers and profiles will you use for email response?

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

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

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

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

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

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

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

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

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

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

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

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

- **Name.** Choose a meaningful name for each response group.
- **Administrator email address.** Choose the email address to which you want to direct unprocessed email (email that cannot be processed due to database error, routing error, and so on) that is sent to profiles in each response group.
- **Description.** Describe the types of email behaviors each response group controls. This information prepares you to set up input arguments for each response group.

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

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

Using the response group description from Step 5, assign the input arguments for each group of email profiles. For a list of available input arguments, see "Siebel eMail Response and Business Services" on page 156.

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

Even if you decide not to modify the predefined workflows, you must activate them in the Business Process Administration screen before starting Siebel Server and receiving incoming email. For additional information about predefined workflows, see "eMail Response Workflow Processes" on page 32 in Chapter 2, "Understanding eMail Response Workflows."

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

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

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

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

Identify the routing and queuing methods you will use: manual assignment, Siebel Assignment Manager, Siebel Universal Queuing, or custom routing and queuing. See "Routing and Queuing Methods Comparison Table" on page 155 for a description of the advantages and disadvantages of each.

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

9 Do you need to set up Siebel Smart Answer?

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

4 Completing Typical Setup Tasks

Setting up Siebel eMail Response for your business will be easier if you plan your setup using Chapter 3, "Planning eMail Response Deployment," before you use the setup procedures in this chapter.

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

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

Basic setup instructions. This section provides step-by-step instructions for setting up eMail Response using information you gathered in Chapter 3, "Planning eMail Response Deployment."

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

Prerequisite Tasks

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

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

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

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

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

    Component groups can also be enabled after the Siebel server installation.
  - During the Siebel Server installation, the spell check feature is installed.

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

- **Siebel Universal Queuing is installed (optional).** If you have chosen to use Siebel Universal Queuing or a third-party universal queuing application, install and configure it using the application documentation. For information about Siebel Universal Queuing, see *Siebel Universal Queuing Administration Guide*.
- **The email server is installed, configured, and tested.** For installation and configuration information, see the installation instructions you received with your email server. See *Siebel System Requirements and Supported Platforms* for a list of supported email servers.
- **Basic tests are performed.** Before you set up eMail Response, perform the following tests:
  - Verify network connectivity by pinging the email server from Siebel Server.
  - Test the email server, and make sure your email server is properly set up. To do this, verify that you can communicate to and from each email account you create. For each email account, you can use any email client to:
    - Set up test accounts
    - Send email from each test account to itself
    - Send email from each test account to an account outside your company

Basic Setup Instructions

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

- **Revise and activate workflow processes.** Siebel Business Process Designer controls the way incoming email is processed. You must activate each workflow on the Business Process Administration screen before using eMail Response.
- **Implement your routing and queuing application.** Tasks depend on the routing and queuing application you choose to implement. You can choose one of the following applications:
  - Use Siebel Assignment Manager to create new assignment rules that route email to an agent who has the appropriate skills.
  - Use Siebel Universal Queuing to create an email channel, routes, and escalation rules, and associate escalation rules with routes.

  NOTE: If you have chosen to use a third-party routing and queuing product, consult that product's documentation for implementation instructions.

- **Set up Communications Server for eMail Response.** You use the Communications Administration screen to assign values to communications driver fields (such as, email server name) and create eMail Response driver profiles and response groups.
- **Create templates, a catalog, and categories.** Use the Communications Administration screen to create templates. Use the Catalog Administration screen to create a catalog and categories. This includes associating templates and solutions with categories.
- **Start Communications Inbound Manager and Communications Outbound Manager.** If you change your eMail Response setup after implementation, you must stop and restart the Communications Inbound Manager and Communications Outbound Manager server components so that your changes take effect.

If you purchase Siebel Smart Answer (optional module), set it up using *Siebel Smart Answer Administration Guide* after you complete your eMail Response setup.

Revising and Activating Workflow Processes

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

You revise and activate workflows in the Business Process Administration screen.

Workflow Status

Workflows are shipped with a status of Inactive. You may want to make changes to the workflows, but it is not required.

For you to activate or modify any workflow, it must have a status of In Progress. To change the status of a workflow to In Progress, you select the workflow and click Revise on the Workflow Processes list. This makes a copy of the original (inactive) workflow and assigns a status of In Progress to the copy.

There are four values for workflow status:

- **Inactive.** A preconfigured workflow installed with an application. Only these workflows display the Inactive status.

  To activate an inactive workflow without making changes, you click Revise and then click Activate. To modify any workflow no matter what its status, you click Revise, make your changes, and click Activate.

  CAUTION: Never delete a workflow in Inactive status. By maintaining a copy of the original workflow, you will always have the original, unchanged workflow to use for future revisions.

- **In Progress.** After you select a workflow process and click Revise, a new record appears with an In Progress status. You can make changes to a workflow before you activate it or you can activate it without making changes. In Progress workflows must be activated before they can be used.

- **Outdated.** A previously active workflow that you have replaced. You will have an Outdated record for each previously active workflow. Outdated workflows are like backup copies containing old information. The Created Date field can help you identify the version in an Outdated workflow record.
- **Active.** The activated workflow that will be used to process eMail Response work items. Only one workflow for each process can be active.

Activating an Inactive Workflow

You must activate all eMail Response workflows before starting eMail Response. A server parameter (Workflow Version Checking Interval) controls how often the server component checks for recently activated versions of each process definition. Workflows are refreshed approximately every hour. After each refresh, recently activated workflows are available. For a list of predefined eMail Response workflows, see Chapter 2, "Understanding eMail Response Workflows."

NOTE: Even if you want to activate an inactive workflow without making changes, you must first click Revise in the Workflow Processes list to change the status to In Progress.

To revise and activate an inactive workflow process

1. From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Processes.
2. In the Queries drop-down list, select eMail Response - Inactive.
3. In the Workflow Processes list, select an inactive eMail Response workflow process.

   NOTE: To select a workflow process, click anywhere on the record except on the name of the workflow. If you click the workflow name, the Process Designer appears.

4 Click Revise.

A new record appears with the same workflow process name but with an In Progress status. If you change your mind about activating the workflow or making changes, you can delete this record and the original inactive workflow process will not be affected.

5 If you want to make changes to the workflow process, use the instructions in *Siebel Business Process Designer Administration Guide*.

CAUTION: Never rename an eMail Response prebuilt workflow. Siebel eMail Response looks for the installed workflow names when it is processing work items.

6 Click Activate.

NOTE: Make sure you have made all necessary changes before you activate the workflow.

After you activate a workflow, multiple records with the same name appear.

- The original workflow has an Inactive status.
- If there was an active workflow with the same name, it has an Outdated status.
- The revised and activated workflow has an Active status.

7 Repeat Step 1 through Step 6 for each eMail Response predefined workflow. For a list of eMail Response predefined workflows, see Chapter 2, "Understanding eMail Response Workflows."

Implementing Routing and Queuing Processes

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

The Process Message and the Process Service Request workflows can use the routing and queuing features in Siebel Assignment Manager and Siebel Universal Queuing to further automate your email interactions. Routing and queuing application choices include Siebel Assignment Manager, Siebel Universal Queuing, and third-party universal queuing applications. See Step 9 on page 81, where you determined the routing and queuing method you will implement.

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

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

You can route email in one of the following ways:

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

- Assignment Manager will assign emails for a specific response group if you set the process property to TRUE for that response group.

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

- Verify that each employee in your database has been assigned the appropriate skills to respond to incoming email. For example, you might assign each employee an email recipient address and define competencies, expertise level, and exception hours.
- Set up the service regions and associate each employee with a service region.
- Create new assignment rules, assign criteria, define employees, and release the rules.
- Activate Assignment Manager.
- Test your Assignment Manager setup.

- **Siebel Universal Queuing or a third-party universal queuing product.** You can use UQ to assign emails by setting the Enable Universal Queuing process property in the eMail Response - Process Message workflow in the following ways:
  - UQ will route and escalate emails for all response groups if you set the process property to TRUE.
  - UQ will route and escalate emails for a specific response group if you set the process property to TRUE for that response group.

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

  - In the Channels view, create one email channel and add properties. Two properties can be used for eMail Response channels: Receiver Address and Sender Address.
  - In the Routes view, create routes, escalations, and escalation rules and associate escalation rules with routes.
    - Routes define high-level criteria such as route priority and service-level times.

- An escalation step defines the time an email can wait in queue before it is passed to the next step. Steps are assigned an order number to control the escalation sequence.
- Escalation rules establish the criteria that determine the agent skills (such as language and level of product knowledge) that are necessary to handle each escalation step.

- In the Employees view, for each employee, assign skills, employee competencies for each skill, expertise for each competency, and the number of simultaneous sessions the employee can have open.
  - Assign skill categories such as language, employee competencies, and expertise for each competency, such as French (Expert) and English (Novice).
  - Select the email channel and assign the maximum number of email items (Simultaneous Sessions) for a specific channel that an agent can be assigned at any given time. This number must be at least 1 for the agent to receive email for the email channel. When set to 1, an agent can receive a maximum of one work item at a time for that channel.
- Activate UQ and test your UQ setup.

Setting Up Communications Server for eMail Response

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

Communications Inbound Manager monitors email accounts (email addresses) by using communications driver profiles to check for inbound messages. Communications Outbound Manager uses communications driver profiles to handle outbound communications to customers.

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

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

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

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

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

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

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

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

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

To set up Communications Server for eMail Response:

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

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

Setting Up Communications Driver Parameters

Siebel eMail Response uses the Internet SMTP/POP3 Server driver for sending and receiving email messages. The Internet SMTP/POP3 Server driver has a number of driver parameters that define the default behavior of this driver. Organizations may have multiple mailboxes they wish to monitor such as support@siebel.com, sales@siebel.com, and marketing@siebel.com. These mailboxes can share common parameters. For example, support@siebel.com, sales@siebel.com, and marketing@siebel.com might have the same SMTP Server and POP3 Server parameter (mail.siebel.com). For more information, see "How the Internet SMTP/POP3 Driver Processes Email Messages" on page 165.

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

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

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

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

Creating a Communications Driver Profile

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

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

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

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

There are two parts to creating a communications profile:

- Create a communications driver profile.
- Assign profile parameter overrides for the profile.

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

To create a communications driver profile

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

   The Communications Drivers list appears.

2. In the Communications Drivers list, select the Internet SMTP/POP3 Server driver.

3. Click the Profiles tab.

   The Profiles list appears.

4. In the Profiles list, click New.

5. Using information gathered during the planning process, complete the necessary fields to add a profile. Use the values you chose in Step 3 on page 83.

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

   a. In the Name field, type the name of the profile you want to add.

   b. Select an organization to associate with the profile.

      - If your company has only one organization, do not change the default value.

- If your company has multiple organizations, click the select button and select the appropriate organization in the Pick Organization dialog box.

c To assign the appropriate responsibilities, click the select button and select the responsibilities needed for this profile in the Responsibilities dialog box.

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

The next task is to assign parameter overrides for the profile. Some driver parameters have no default value. If a parameter is required, you must assign the value as a profile parameter override when you create the profile.

To assign parameter overrides for a profile

1 In the Profiles list, make sure you have selected the appropriate profile.

2 In the Profile Parameter Overrides list, click New.

3 Using information gathered during the planning process, add the necessary parameter override fields. Use the values you chose in Step 4 on page 83.

a In the Name drop-down list, select the name of the driver parameter for which you want to change the value.

If you cannot see the entire name in the drop-down list, pass your cursor over it to make the full name appear.

b Complete the Value field.

c Repeat for each profile parameter override.

Repeat the two procedures in this section for each eMail Response mailbox. For more information, see *Siebel Communications Server Administration Guide*.

Creating a Response Group

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

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

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

After assigning input arguments to a response group, you associate the response group with profiles (email addresses). All mail sent to these profiles will be handled as specified by the input arguments assigned to the response group.

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

To set up All Response Groups, perform the following tasks:

- Create a response group.
- Associate a response group with one or more profiles.
- Add input arguments to a response group.

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

To create a response group

1. From the application-level menu, choose View > Site Map > Communications Administration > All Response Groups.

   The Response Groups list appears.

2. On the Response Groups form, click New.

3. Using information gathered during the planning process, complete the necessary response group fields. Use the values you chose in Step 5 on page 84.

   Use Table 5 on page 103 to complete the response group fields.

Table 5. Response Group Fields

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

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

To associate profiles with a response group

1. Click the Profiles tab.
2. In the Profiles list, click the menu button and choose New Record.

   The Add Communication Profiles dialog box appears, listing existing profiles.
3. In the Add Communication Profiles dialog box, select profiles you identified in Step 5 on page 84.

   Only profiles you have added will display on the list. To add more profiles, see "To create a communications driver profile" on page 100.
4. Click the tab jump button to view and select additional profiles.
5. Click OK to associate the selected profiles with the response group.

   The profiles appear in the Profiles list.

The last task in creating a response group is to add input arguments to the response group.

To add input arguments to a response group

1. Click the Input Arguments tab.
2. In the Input Arguments list, click the menu button and choose Generate Defaults.

   Default input arguments appear on the Input Arguments list.

   Default input arguments are based on the business service method. For a list of eMail Response process properties used as input arguments, see "Frequently Used eMail Response Process Properties" on page 34. For more information about frequently used input arguments, see Chapter 2, "Understanding eMail Response Workflows."

   See Table 6 on page 105 for descriptions of the required fields.
3. For the eMail Response - Process Message workflow, add the Catalog Name input argument:

a Click New.

b In the Name field, type `Catalog Name`.

c In the Value field, type the catalog name.

You will create this catalog and its categories in the procedure named "To create a catalog for the eMail Response - Process Message workflow" on page 115.

4 Add other new input arguments using information gathered during the planning process. Use the values you chose in Step 6 on page 85.

a Click New.

b Type the name and value of the input argument exactly as they appear in the tables in "Siebel eMail Response and Business Services" on page 156.

5 To delete an input argument record, click the menu button and choose Delete Record.

Table 6. Input Arguments

Field Name	Default Value	Description
ProcessName	eMail Response - Process Message	Required. The name of the workflow process that processes eMail Response inbound messages. Change to eMail Response - Process Service Request for keyword-based response groups.
RowID		Default input argument. Not used.
Catalog Name		Required for the eMail Response - Process Message workflow.

Creating Templates, Catalogs, and Categories

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

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

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

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

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

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

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

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

Using Substitution Fields in eMail Response Templates

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

Setting Up Workflow to Use Substitution Fields

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

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

To set up eMail Response templates substitution fields

1. From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Processes.
2. In the Workflow Processes list, select the inactive eMail Response - Response Workflow record, and click Revise.
3. Click the Process Designer tab, and double-click the Get Response Text business service step.

   The Business Service form appears.
4. In the Method field, choose Get Expanded Text.

NOTE: If the method you want does not appear, type the method name and click OK.

---

5 Add the following input arguments and their parameters:

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

6 From the Business Services tab, click Return To Designer, and then double-click the Expand Template Text business service step.

7 Add the following input argument and its parameters:

Input Argument	Type	Value	Property Name
Expand Template	Literal	Y	

8 From the Business Services tab, click Return To Designer, and then click the All Processes tab.

9 On the Workflow Processes tab, click Activate.

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

Enabling Additional Business Components to Use as Substitutions

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

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

```
Source Id Field: Account = Account Id
```

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

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

```
Source Id Field: Quotes = Quote Id
```

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

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

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

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

Using Solutions and Creating Email Templates

Solutions and Templates objects can be used as templates in eMail Response. They can provide answers to frequently asked questions. To help you determine when to use solutions, when to use templates, and how each compares to a free-form reply, see "Solutions and Templates Decision Table" on page 154.

Using Solutions

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

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

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

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

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

Creating Email Templates

There are Simple templates and Advanced templates. Siebel eMail Response only uses Simple templates. Therefore, this guide provides information about creating a Simple template.

Templates can include template substitution fields that bring in data directly from your database. For information about using substitution fields, see "Using Substitution Fields in eMail Response Templates" on page 107. For information about templates, see *Siebel Communications Server Administration Guide*.

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

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

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

To create a Simple template

1. From the application-level menu, choose View > Site Map > Communications Administration > All Templates.

   The All Templates view appears.

2. In the Templates list, click New.

   A new record appears in the Templates list. See the table at the end of this procedure for descriptions of template fields.

3. In the Templates list, complete the Name, Channel Type, and Description fields.

4 In the Simple form, use the templates gathered during the planning process to complete the necessary fields. Use the information you obtained in Step 4 on page 79.

See the table at the end of this procedure for default values and descriptions of template fields.

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

Field Name	Default Value	Description
Name		Required. Name of the template. Choose a name that clearly identifies the template's purpose.
Channel Type	Email	Required. Communications channel that will use this template. Always use Email for eMail Response. Other channel types are Fax, Wireless, and Page.
Description		Optional. Should describe the purpose of the template.
Subject	Do not use for eMail Response.	System-filled. In eMail Response, if you put a value in this field when creating the template, this value will be overwritten with the subject of the incoming email in the reply. This field is used for Send Email and Send Fax templates only.

Field Name	Default Value	Description
Template Type		Required. Possible values are Greeting, Body, and Closing. Agents use these templates to tailor each area of a reply to a customer. ■ **Greeting or Closing.** Used only for eMail Response. You may want formal and casual greeting and closing templates. Other situations might call for a more detailed greeting or closing. Greeting and closing templates should be generic across the application and should not be associated with a category. ■ **Body.** Used for Send Email, Fax, Wireless Message, and Page templates. It is not needed for eMail Response templates unless you want to make the templates available for Send Email, Fax, Wireless Message, and Page. Only templates intended to be used as body templates should be associated to a category.
Recipient Group		Required. Selecting a group determines the values that appear in the Available Substitutions list. The Recipient Group drop-down list contains all business objects that have a primary business component. In many cases, this will map to specific customer screens. After choosing a recipient group, the available substitutions for the selected group appear in the Available Substitutions selection box. Only field substitutions from the Action recipient group will appear correctly in any greeting or closing templates that are set up as defaults in the Outbound Communications view in the User Preferences screen. For more information about setting user preferences, see *Siebel Call Center User Guide*.
Public checkbox		Optional. Not used by eMail Response.

Field Name	Default Value	Description
Available Substitutions		Optional. Substitutions are variable fields that take the place of actual information that will vary from one email to another. Values come from the business components and are added using Siebel Tools. For example, the available substitutions for the Action business component appear when you choose the Activity Contact recipient group.

Template Text		Required. Template Text can be free-form text with or without substitution fields. Type the text for the template type you choose, copying and pasting available substitution fields where you want the value to appear.
		For example, when the casual greeting template is:
		`Dear [First Name],`
		The email reply shows:
		`Dear Bob,`

Creating a Catalog and Categories

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

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

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

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

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

   The Catalogs list appears.

2 In the Catalogs list, click New.

3 In the Name field, type the catalog name you want to use.

   NOTE: Catalog names must be unique.

   The new catalog appears in the Catalogs list.

After creating the catalog, you must create categories and associate templates and solutions with each category.

To set up categories, you perform the following tasks:

- Create categories in a catalog.
- Associate templates with a category.
- Associate solutions with a category.

To create a category in a catalog

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

2 In the Catalogs list, click the catalog name.

3 In the Categories list, click New.

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

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

   Use the values you chose in Step 6 on page 80.

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

Field Name	Default Value	Description
Name		Required. Name of the category. Choose a name that clearly describes what templates will be associated with the category.
Display Name		Required.
Description		Optional.

To associate a template with a category

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

2 Click the catalog name hyperlink.

3 Select the category with which you want to associate a template.

4 Using the tab jump button, find and click the Response Templates view tab.

5 In the Response Templates list, create a new record.

6 In the Add Templates dialog box, use the tab jump button to find and select one or more templates you want to associate with the category.

Use the templates you matched with categories in Step 6 on page 80.

7 Click OK.

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

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

To associate a solution with a category

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

The Catalogs list displays.

2 Click the catalog name.

The Categories list appears.

3 Select the category with which you want to associate a solution.

4 Using the tab jump button, find and click the Solutions view tab.

The Solutions list appears.

5 Click the menu button and choose New Record.

6 In the Add Solutions dialog box, use the tab jump button to find and select one or more solutions you want to associate with the category.

Use the values you chose in Step 6 on page 80.

7 Click OK.

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

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

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

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

HTML Wrapper Templates

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

To create a wrapper template to use with eMail Response replies, perform the following tasks:

- Create a wrapper template, by using any HTML editor.
- Create a communications template.
- Modify the eMail Response - Client Send Email workflow in the Business Process Designer.

To create an HTML wrapper template

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

To create a communications template

1. Follow the instructions in "Creating Templates, Catalogs, and Categories" on page 106 and *Siebel Communications Server Administration Guide* to create your communications template.
2. On the Simple tab, use the values shown for the following fields:

Field Name	Value
Template Type	Body
Recipient Group	Email Activity Receiver

3. On the Template Items tab, check Substitute Values and Message Body.
4. Add the wrapper template and associated graphics files to template items in Communications Administration > All Template > Template items. For information about adding template items, see *Siebel Communications Server Administration Guide*.

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

To modify the Client Send Email workflow

1. From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Processes.
2. From the Queries drop-down list, select the appropriate eMail Response query.

NOTE: For example, if you want to change your active Client Send Email workflow, select eMail Response - Active.

3 In the Workflow Processes list, select the eMail Response - Client Send Email record and click Revise.

4 Click the Process Designer view tab and double-click the Send Response business service.

5 In the Business Service form, in the Method field, click the select button.

6 In the Business Service Method dialog box, select Create and Submit Request and click OK.

7 In the Input Arguments list, add the input arguments that appear in the table at the end of this procedure.

8 In the Business Service form, click Return to Designer and click the All Processes view tab.

9 In the Workflow Processes list, click Activate.

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

Managing Template Visibility

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

- Associate a template with a business component. The template will be visible only when you are in a view associated with that business component.
- Type of template selected (Greeting, Body, and Closing). For example, when you choose Greeting as the template type, only template names for that type appear for selection.

  NOTE: Greeting and closing templates are used only in eMail Response replies, not in Send Email (F9) or Send Fax (CTRL + F9) communications. For more information about template types, see "To create a Simple template" on page 111.

- By assigning default values in the Outbound Communications view of user preferences. For more information, see "Filtering Templates by Assigning User Preferences Default Values" on page 121.
- By using access groups to filter objects. For more information, see "Using Access Groups to Filter Objects" on page 122.
- In Siebel Smart Answer, body templates must be associated with a category in the current KB file or the template will not be visible to you.

Filtering Templates by Assigning User Preferences Default Values

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

- **Template format (plain text or HTML)**. Set your Default Message Format in the Outbound Communications view of User Preferences. If you set your default message format to Plain Text, HTML templates will not be visible to you. Therefore, each template should created once as an HTML template and once as a plain text so that it will be available to all users.

- **Language and locale.** You can set your language and locale in the Outbound Communications view of User Preferences. If you do not set this user preference, the language and locale used during the installation of Siebel software will be the default. In a global deployment, some templates need to be created in specific languages and locales. Because you can see only templates that were created for your language and locale setting, each template you wish to use for another language and locale, should be created in that language and locale.

Using Access Groups to Filter Objects

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

To assign an access group to a catalog

1. From the application-level menu, choose View > Site Map > Catalog Administration.
2. In the Catalogs list, select a catalog.
3. Click the Access Groups view tab and create a new record.
4. In the Add Access dialog box, select the groups that should have visibility to this catalog and click OK.

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

To assign an access group to a category

1. From the application-level menu, choose View > Site Map > Catalog Administration.
2. In the Catalogs list, click the catalog name hyperlink.
3. Select an existing category or create a record and complete the fields.
4. Click the Access Groups view tab.
5. Create a new record.
6. In the Access Group field, select the groups that should have visibility to this category and click OK.

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

Starting Communications Inbound Manager Tasks

One instance of the Communications Inbound Manager server component has multiple subtasks that run at the same time as the server component. Communications Inbound Manager server component tasks and subtasks must be running before eMail Response can process incoming email. Therefore, you must start all Communications Inbound Manager server component tasks and subtasks. For general information about server components, see the *Siebel Server Installation Guide* for your operating system.

NOTE: One component task can have multiple subtasks associated with it and the subtasks route the email. The component task acts like a controller to coordinate its subtasks.

After you implement eMail Response, certain situations require that you stop and restart Communications Inbound Manager server component tasks. The two most common reasons are:

- When you make changes to the eMail Response setup, you must stop and restart Communications Inbound Manager server component so that your changes will take effect. For some changes, you must stop and restart the server component only if you want your changes to take effect immediately. The following are two examples:

  - Communications profiles are refreshed (reloaded) at regular intervals. If you make changes and want the changes to take effect immediately, you should stop and restart the Communications Inbound Manager server component.
  - Workflows are refreshed (reloaded) at regular intervals. If you make changes to a workflow process and want the changes to take effect immediately, you should stop and restart the Communications Inbound Manager server component.

  If you need to make an eMail Response setup change, you should stop the corresponding Communications Inbound Manager component task before you make the change and start it after you make the change.

  NOTE: You do not need to start or stop subtasks. The Siebel server infrastructure does not allow you to control subtasks directly.

- Communications Inbound Manager automatically stops when an error in an incoming work item (for example, an email or a phone call) causes abnormal behavior during processing. An error of this type might be a missing From address in an email or a stopped UQ engine.

  When Communications Inbound Manager stops the email server component, you have to restart Communications Inbound Manager in the Server Administration screen.

If you try to start the same Communications Inbound Manager component task twice, it will be rejected the second time. However, the first instance will be running as usual. You can always increase the number of subtasks for each component task if you have a high volume of incoming emails.

Server Component Task Auto-Start

Communications Inbound Manager server component tasks can be set to start automatically when an instance of Siebel Server starts or restarts.

When Communications Inbound Manager starts, it looks for All Response Groups in which Startup = Automatic and Siebel Server = [current Siebel Server name]. If Communications Inbound Manager finds these properties, it automatically starts a component task for each corresponding response group.

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

Communications Inbound Manager can start multiple component tasks, one for each response group. Each task has multiple subtasks, representing a workflow thread that can process inbound messages. If one of these subtasks fails, the current subtask ends (with a status of Complete), it signals the rest of the subtasks to end (with a status of Complete), and then the component task ends (with a status of Complete).

When a task fails, the following events occur:

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

Server Component Auto-Restart

When Communications Inbound Manager crashes, a new Communications Inbound Manager process will be started automatically if the AutoRestart component parameter = TRUE. The new process looks through all the response groups defined in the database and picks those records in which Startup = Automatic and Siebel Server = [current Siebel Server name] and starts a Communications Inbound Manager component task for each one of them.

To verify Communications Inbound Manager auto-restart

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

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

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

Starting Communications Inbound Manager

Every time you start an instance of Communications Inbound Manager, the application starts a parent task and three children tasks. The Communications Inbound Manager parameter named The Number of Subtasks is set to three by default. The parent task is assigned the first (lowest) task number (for example, 1318). The three subtasks are assigned the next numbers in sequence (for example, 1319, 1320, and 1321).

The parent task manages the subtasks and the message queue. The children subtasks process inbound messages by pulling the inbound messages from the queue and passing them to the appropriate workflow.

You can start Communications Inbound Manager in the following ways:

- Using the Server Administration screen.
- Using the server manager command line.

To start the Communications Inbound Manager using the Server Administration screen

1. From the application-level menu, choose View > Site Map > Server Administration > Enterprise Operations.

2 Click the Component Requests view tab.

3 In the Component Requests list, click New.

4 From the Component/Job drop-down list, select Communications Inbound Manager.

5 Scroll down to the Component Request Parameters list and click New.

6 Complete the fields.

   a In the Name field, select Response Group Name.

   b In the Value field, type the name of a valid response group.

7 Scroll up to the Component Requests form, click the menu button and then select Submit request.

   The status field should change to Queued. When you refresh the view, the status should change to Active.

To start the Communications Inbound Manager using the server manager command line

1 From the command line, start the server manager program. For details, see *Siebel Server Administration Guide*.

2 In the server manager command line, type the following:

```
start task for comp comminboundmgr with
respgrp="responsegroupname"
```

3 Press the Enter key.

Stopping Communications Inbound Manager

To stop the Communications Inbound Manager, you need to stop the parent task. Stopping the parent task stops the children subtasks. You can stop Communications Inbound Manager in the following ways:

- Using the Server Administration screen.
- Using the server manager command line.

To stop Communications Inbound Manager

1. From the application-level menu, choose View > Site Map > Server Administration > Enterprise Operations.
2. Click the Enterprise Tasks view tab.
3. In the Tasks list, query for the component named Communications Inbound Manager.
4. Select the Communications Inbound Manager with the lowest Task number from the Tasks list.

   The Task State field contains a value of Running.
5. In the Tasks list, click the menu button and select Stop Task.

   The parent task and all it's children tasks stop and the Task State field contains a value of Completed.

To stop the Communications Inbound Manager using the server manager command line

1. From the command line, start the server manager program. For details, see *Siebel Server Administration Guide*.
2. In the server manager command line, type the following:

```
list task for comp comminboundmgr
```

3 When the four comminboundmgr tasks appear, identify the parent task for the response group that you want to monitor. The following is an example of a group of comminboundmgr tasks:

   smtb50a036 CommInboundMgr 1045

   smtb50a036 CommInboundMgr 1044

   smtb50a036 CommInboundMgr 1043

   smtb50a036 CommInboundMgr 1042 (parent)

4 Type stop task [parent task number].

   The following is an example of what you might type on the command line:

```
stop task 1042
```

Global Deployment Setup and Configuration 5

This chapter covers setup and configuration topics for multilingual, Unicode database, or non-Unicode database deployments. Siebel eMail Response setup and configuration steps are the same for each deployment type. For more information, see *Global Deployment Guide*.

Siebel eMail Response can be configured to handle email in multiple languages, receiving messages in multiple languages and responding to messages in the sender's language. Using Assignment Manager or Universal Queuing, Siebel eMail Response can route messages to the appropriate agents based on language. For more information, see *Siebel Assignment Manager Administration Guide* or *Siebel Universal Queuing Administration Guide*.

Additionally, Siebel Smart Answer can be used to detect the language of some incoming email messages, automatically interpret a customer's request, and suggest responses in the original language of the messages. For more information, see *Siebel Smart Answer Administration Guide*.

For more information, see *Release Notes* and *Global Deployment Guide*.

Deploying eMail Response Internationally

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

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

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

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

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

- Monitors response groups set up for each language that your organization supports.
- Creates an activity record in the Siebel database that stores the content of the email along with the language of the email message. The original email message is also stored as an attachment to the record.
- Sends an acknowledgement message using the original language of the message. For example, if a user sends a message in French, an acknowledgement message will be sent to the user in French.

- Routes an inbound email message to the agent that can best handle the message. The routing is based on assignment rules defined using Assignment Manager and Universal Queuing. For example, a French message will be routed to an agent that has French as a language skill. See *Siebel Assignment Manager Administration Guide* and *Siebel Universal Queuing Administration Guide*.

- Suggests responses or automatically responds to the messages in the sender's native language using Siebel Smart Answer.

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

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

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

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

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

- Checks spelling for the most common international languages. For more information, see "The Spell Check Feature" on page 17.

Planning eMail Response Global Deployment

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

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

NOTE: The language field is not displayed in the Activities list. To see the language of the activity, you have to select the More Info tab, click the Show More button, and check the Language field.

- What communications templates have you decided to use in eMail Response replies? If your organization is planning to support multiple languages and decides to add new templates, the template text will have to be translated to the languages that the customer plans to support.

  See "Creating Templates For International Deployment" on page 137.

Setting Up eMail Response for International Deployment

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

International Deployment Setup Tasks Prerequisites

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

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

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

Installing Language Packs and Communications Templates

When you install Database Language packs, the communications templates associated with eMail Response are installed. You can create additional templates to meet your business requirements, following best practices guidelines. See "Creating Templates For International Deployment" on page 137.

For example, when the customer installs the language packs, choosing French as the base language and English and German as additional languages, the installer installs the following templates:

- Base language templates are installed as *templ_name* and *templ_name_fra*.
- Additional templates are installed as *templ_name_deu*, *templ_name_enu*, and so on (based on the selected languages).

The templates have an English name with a suffix indicating the language and the contents of the templates are translated into the respective language. For example, the auto-acknowledgement template will be eMail Response - Auto Acknowledgment FRA and the actual content of the template will be in French.

Setting Up Email Accounts For Supported Languages

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

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

Configuring Response Groups For International Deployment

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

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

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

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

MsgDefaultLanguageCode is an argument in the workflow process. It specifies the language that the workflow process uses to set the language of an activity record created. For example, when a user sends an email to `fra_support@yourcompany.com`, an activity record is created and the language of the activity is FRA. Based on the activity language, Assignment Manager and Universal Queuing can assign the activity to the agent that handles French emails.

For more information on how to create profiles and response groups, see "Setting Up Communications Server for eMail Response" on page 97 and *Siebel Communications Server Administration Guide*.

Creating Templates For International Deployment

When creating templates in international deployments, follow the convention of naming the templates in English with a language-code suffix (for example, `MyNewTemplate_ITA`). This will help maintain consistency. It is the naming convention used by Siebel Systems for translating the standard templates used by eMail Response into the languages Siebel Systems supports. It is recommended that you follow the same naming convention.

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

For instruction on how to create templates, see "Creating Templates, Catalogs, and Categories" on page 106 and *Siebel Communications Server Administration Guide*.

Language Support For International Deployment

The following should be considered in an eMail Response international deployment:

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

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

  Because the Subject and Body cannot be converted, they appear as undisplayable characters. These emails are not processed by eMail Response, no activities are created, and the email is sent as an attachment in email format to the administrator for review (if you set up the administrator email profile).
- Communications Inbound Manager allows the use of most widely-used character sets including 1252 / Latin-1, Shift-JIS, ISO-2022-JP (mail JIS), EUC-JP, and UTF-8.
- When eMail Response replies to email messages, the prefix strings are in English and are not translated to the various languages supported.

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

Completing Advanced Setup Tasks 6

Before you use the advanced setup procedures in this chapter, follow all instructions in Chapter 3, "Planning eMail Response Deployment" and Chapter 4, "Completing Typical Setup Tasks."

Many customers can deploy Siebel eMail Response without advanced customizing. For customers with more complex needs, this chapter contains information that can be used to customize Siebel eMail Response - Process Service Request workflows.

Authenticating the Email Sender's Email Address in eMail Response

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

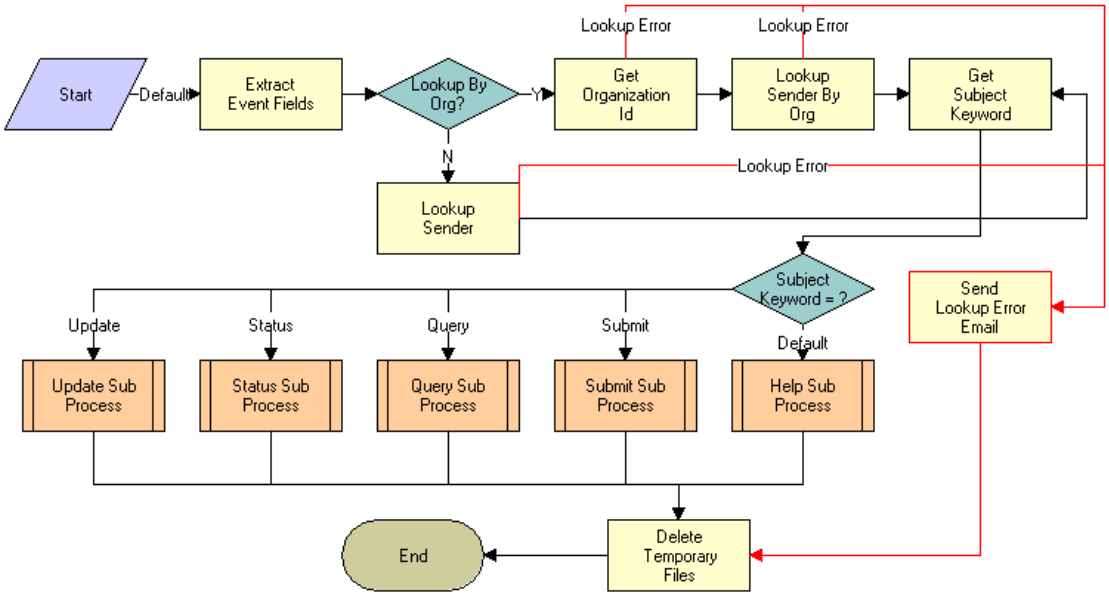

Figure 17. eMail Response - Process Service Request

About the Lookup Sender Business Service

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

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

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

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

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

Authenticating a Sender's Email Address Using Employee Email Address

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

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

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

- "Changing the Lookup Sender Step to Capture Alternate Email Address"
- "Changing Related Workflows and Subprocesses" on page 143

Changing the Lookup Sender Step to Capture Alternate Email Address

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

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

1. From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Processes.
2. Select the active eMail Response - Process Service Request workflow.

   If it is not active, then select the eMail Response - In Progress or the eMail Response - Inactive version of the workflow.
3. Click the Revise button to allow updates to the workflow process.
4. Click the Process Designer view tab and double-click the Lookup Sender step in the workflow process graphic.
5. Change the following fields:

a Select the Business Object input argument and change the value to Employee.

b Select the Business Component input argument and change the value to Employee.

c Select the Email Address input argument and change the value to EMail Addr.

d Select the Query Fields input argument and change the value to EMail Addr.

e Select the Value Fields input argument and change the value to Id.

f Delete the Account Id output argument.

To recapture the account ID, see "Recapturing the Account ID (Optional)–Example" on page 146.

6 Click Return to Designer and click the Process Properties view tab.

7 In the Process Properties list, create a new process property called Employee Id and change the value in the Data Type field to String.

8 Click the Process Designer view tab and double-click the Lookup Sender step.

9 Modify the Contact Id output argument and set the Name to Employee Id instead of Contact Id.

Changing Related Workflows and Subprocesses

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

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

Refer to the following steps for an example of how to set up an employee ID in a subprocess workflow:

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

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

Authenticating a Sender's Address Using Alternate Email Address

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

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

Using Siebel Tools to Create a New Business Object

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

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

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

Changing the Lookup Sender Step to Capture Alternate Email Address

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

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

1. From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Processes.
2. Select the active eMail Response - Process Service Request workflow.

   If it is not active, then select the eMail Response - In Progress or the eMail Response - Inactive version of the workflow.
3. Click the Revise button.
4. Click the Process Designer view tab and double-click the Lookup Sender step in the workflow process graphic.
5. In the Input Argument list, change the following fields:
   a. Change the Business Object value to Communication Address.
   b. Change the Business Component value to Communication Address.
   c. Change the Email Address value to Address.

d Change the Query Fields value to Address.

e Change the Value Fields value to Person Id (the foreign key that stores the row ID of the contact).

6 In the Output Argument list, make the following changes:

a Delete Account Id.

To recapture the account ID, see "Recapturing the Account ID (Optional)–Example".

b Change the argument from Object Id to Person Id.

Recapturing the Account ID (Optional)–Example

The scenarios in "Authenticating the Email Sender's Email Address in eMail Response" on page 140 contain a step that deletes the Account Id output argument. When you delete the Account Id output argument, the eMail Response - Process Service Request workflow no longer captures the account ID for the contact. You can use the Contact Id process property to obtain the account ID value using the following example. For more details, see *Siebel Business Process Designer Administration Guide*.

1 Create a new business service step in the workflow process and call it Find Contact Account. Set the business service to Inbound Email Siebel Operation and the method to FindRecord.

2 Connect the Lookup Sender to the Find Contact Account step instead of the Get Subject Keyword step.

3 Connect the Find Contact Account step to the Get Subject Keyword step.

4 In the Find Contact Account step, create the following input arguments and assign the values shown:

Input Argument	Type	Value
Business Object	literal value	Contact
Business Component	literal value	Contact
Query Fields	literal value	Id
Value Fields	literal value	Account Id
Object Id	process property	Contact Id

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

Troubleshooting eMail Response 7

This chapter describes some error conditions you may encounter and suggests ways to correct them.

The errors described here appear in alphabetical order. For each error condition, this chapter provides a description, a way to diagnose it, a possible cause, and a suggested way to resolve the problem. If a solution provided in this chapter does not solve the problem, contact Technical Support.

Cannot Activate Workflow Process

Description. When I activate eMail Response workflows in the Business Process Administration screen, the following error appears:

```
Cannot activate workflow process '<ProcessName>' version
[<VersionNumber>]. Make sure it has 'In Progress' status.
```

How to diagnose. Verify the status of the workflow process that you are trying to activate.

Possible cause. You cannot activate a workflow process unless its status is In Progress.

How to resolve. You must select a workflow process, click Revise to create a new workflow process record with a status set to In Progress, and then click Activate. If the status of the workflow is not In Progress, use "Revising and Activating Workflow Processes" on page 91.

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

Communications Inbound Manager Stops

Description. The Communications Inbound Manager server task stops and email processing stops.

How to diagnose. Open the CommInboundMgr log file and look for one of the following error messages. No special tracing or settings need to be set up to find these errors.

Cannot Initiate Process Definition

```
Cannot initiate process definition '<ProcessName>'. Verify that it
does exist, has an 'Active' status, is activated and has not expired.
```

Possible cause. The workflow process specified in the response group that the Communications Inbound Manager task is running does not exist or is not activated. The workflow process used by the response group and run through Communications Inbound Manager needs to exist and have an Active status.

How to resolve. Verify the workflow status.

To verify the workflow status

1. From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Process.
2. In the Workflow Processes list, request a new query for the workflow process name shown in the error message.

   Make sure that the workflow exists and that its status is Active.
3. If the workflow process cannot be found using a query, perform the following tasks:
   a. Verify that the correct ProcessName input argument is specified on the response group.
   b. Find the correct ProcessName input argument, copy the name of the process, and paste it into the ProcessName Value field in the response group.
   c. Retest Communications Inbound Manager.

d If the workflow status is Inactive or In Progress, use "To revise and activate an inactive workflow process" on page 92 to activate the workflow process. Be sure to activate all related workflows, including subprocesses, and then restart the Communications Inbound Manager task.

Unable to Find Component Definition

```
Unable to find definition for component CommOutboundMgr
```

Possible cause. The Communications Outbound Manager server component is not synchronized correctly.

How to resolve. To resolve this error, synchronize the batch components on the Siebel Server using the following steps:

To synchronize the Siebel Server batch components

1. From the application-level menu, choose View > Site Map > Server Administration > Enterprise Configuration View.
2. Select Batch Administration.
3. Click the Synchronize button to synchronize the batch components.
4. Restart the Communications Inbound Manager task.

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

Tables and Reference A

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

Solutions and Templates Decision Table

Table 7 will help you determine when to use solution documents (called FAQs in Siebel eService), when to use reply templates, and how each compares to a free-form reply.

Table 7. Solutions and Templates Decision Table

Free-Form Reply	Template	Solution
Personalized.	Less personal than free-form.	Less personal than free-form.
Time-consuming.	Faster than free-form.	Faster than free-form.
More error-prone.	Content can be verified and preapproved by legal and other departments before using.	Content can be verified and preapproved by legal and other departments before using.
Does not use substitution fields.	Can select identified fields from an incoming email and insert them in predefined places in your template. Can include multilevel substitution fields using the Advanced Template form, such as links to service requests, orders, and opportunities.	Does not use substitution fields.
A one-time effort that cannot be shared with other customers unless you recreate the email.	Can be sent to any customer by selecting the template within eMail Response.	The same solutions files can be shared across channels. Updates only need to be done once and then all users have access to the most current information. An agent can insert the contents of a solutions file into the body of an email message (eMail Response), use it to reply to a customer's request received during a telephone call (Call Center), and publish it on a service Web site (Siebel eService).
Can attach files.	Can attach a file to an email that contains a template. However, eMail Response does not support adding attachments to templates.	Can attach a file to an email that contains a solution. However, eMail Response does not support automatically adding attachments from solutions.

Routing and Queuing Methods Comparison Table

Table 8 lists the advantages and disadvantages of each routing and queuing method.

Table 8. Routing and Queuing Methods Comparison

Routing Method or Product	Advantages	Disadvantages
Manual routing	Very simple.	Very slow: Each email must be manually assigned to an agent. Requires a person dedicated to the routing process.
Custom Routing and Queuing	Meets precise business requirements. Can accommodate more complex business processes and hierarchies.	Takes time to design and program.
Siebel Assignment Manager	More powerful. Skills-based routing. Workload-based routing. Rules maintenance in graphical user interface. No programming required.	No real-time notification using the communications toolbar. No blending of inbound communications across channels.
Siebel Universal Queuing	Most powerful. Skills-based routing. Keeps track of agent availability and workload sessions in real time. Maintenance performed in graphical user interface. Real-time notification using the communications toolbar. Access to communications channels (email, voice, Web collaboration, and so on) by using the communications toolbar.	Must be purchased separately.

Siebel eMail Response and Business Services

Siebel eMail Response uses business services to interact with your database. A business service provides a new top-level object (such as a business object or applet) that can be used to implement reusable business logic and implement business rules capabilities. For more information about business services, see *Siebel Tools Reference*.

Siebel eMail Response uses many business services and their associated input arguments in its workflow processes. The two business services used by eMail Response are Inbound Email Manager and Inbound Email Database Operations.

Inbound Email Manager Business Service

Table 9 shows a list of methods and input arguments with descriptions for this eMail Response business service.

Table 9. Inbound Email Manager Methods and Input Arguments

Method	Input Argument	Description
AddAttachments		Creates attachment records for the attachments in EventFields.
	Business Component	Business component in which attachment records are created.
	Business Object	Business object in which attachment records are created.
	EventFields	Hierarchy that contains file properties, such as `FileName0`, `FilePath0`, `FileName1`, `FilePath1`, and so on.
AddCategories		Associates categories with an activity record.
	ActivityId	ID of activity record with which categories are associated.
	BusComp	Business component in which category associations are created.
	BusObj	Business object in which category associations are created.
	Catalog	Catalog in which the system looks up categories.
	Categories	List of categories and corresponding scores.

Table 9. Inbound Email Manager Methods and Input Arguments

Method	Input Argument	Description
DeleteTempFiles		Deletes temporary files specified in EventFields.
	EventFields	Hierarchy that contains file properties, such as `FilePath0`, `FilePath1`, and so on.
GetCategories		Gets the list of categories and scores associated with an activity.
	ActivityId	ID of activity record from which categories are obtained.
	BusComp	Business component of the associated categories.
	BusObj	Business object of the associated categories.
	Categories	List of categories and corresponding scores.
GetEventCategories		Enumerates the categories in EventFields and returns them in a hierarchy.
	Categories	List of categories extracted from EventFields.
	EventFields	EventFields that contain category properties prefixed by `CATEGORY`.
GetPreference		Gets the value of a user preference.
	Category	Category of preference.
	Preference	Name of preference.
	Value	Value of preference.

Table 9. Inbound Email Manager Methods and Input Arguments

Method	Input Argument	Description
GetResponseText		Gets the auto-suggest/response text for a set of categories based on their scores and thresholds.
	Catalog Id	The ID of the catalog in which your categories are stored. If the Catalog Id input argument contains a value, the Catalog Id is used to locate the catalog.
	Categories	List of categories and corresponding scores.
	CheckThreshold	If `Y`, checks category scores against the threshold to determine whether response text for a category is used. If `N`, gets the response text based on scores alone.
	Catalog Name	The name of the catalog in which your categories are stored. If the Catalog Id input argument contains a value, the Catalog Name input argument is ignored.
	MaximumSections	Maximum number of categories for which response text will be returned.
	ResponseText	Response text for the set of categories.
GetSearchSpec	[Name of a business component field, such as Area or Extract]	Creates a search specification based on the fields included as input arguments. For example, if Abstract and Area were input arguments, the search specification named `[Area] = "Installation" AND [Abstract] = "Production"` would be called the SRSearchSpec output argument.
GetTokens		Gets a specified number of tokens from a string. The tokens are returned in output properties such as `Token 1`, `Token 2`, and so on.
	Delimiter	One or more characters that set off a token from surrounding characters. Default is the space character.
	NumTokens	The number of tokens to obtain. Default is `1`.
	Text	The text from which the tokens are obtained.

Table 9. Inbound Email Manager Methods and Input Arguments

Method	Input Argument	Description
GetUQCategories		Creates a WorkItemDataProperty hierarchy required by UQ. Every input property will be added to the output hierarchy.
	Categories	List of categories and corresponding scores. The category with the highest score is extracted and added to the WorkItemDataProperty hierarchy.
	WorkItemDataProperty	Hierarchy with the highest scored category and all input properties.
ParseText		Extracts response properties from the email. The input arguments of this method include a fixed argument called `Text`, which contains the text to parse and one additional argument for each response property to extract. The types of these additional arguments are `Literal` and the values indicate the patterns to match and are in the following format: `["Last("] {prefix} "%s" [{suffix} | "\n"] [")"]` ■ The text `"Last("` at the beginning and the text `")"` at the end are optional. They indicate that the last occurrence of the pattern should be used if there are multiple occurrences. If they are not specified, the first occurrence will be used. ■ `{prefix}` represents any literal that marks the beginning of the pattern and is required. ■ `"%s"` marks the value to be extracted and is required. ■ `{suffix}` represents any literal that marks the end of the pattern. Alternatively, `"\n"` can be specified as a suffix to indicate that the pattern ends at the end of the line. The extracted response properties are used in the workflow process.
	Text	The string to parse.

Table 9. Inbound Email Manager Methods and Input Arguments

Method	Input Argument	Description
ReturnPropSet		Returns a hierarchy that contains the input properties and properties from the input hierarchy.
	PropSetType	The type of the output hierarchy.
SetResponseFields		Constructs To, CC, and BCC lines for outbound email based on corresponding lines from inbound email.
	InputEmailBccLine	BCC line in inbound email.
	InputEmailCcLine	CC line in inbound email.
	InputEmailToLine	To line in inbound email.
	InputMsgReceiveAddress	Receiver address in inbound email.
	InputMsgSenderAddress	Sender address in inbound email.
	InputResponseType	Reply, Reply to All, or Forward.
	OutputEmailBccLine	BCC line for outbound email.
	OutputEmailCcLine	CC line for outbound email.
	OutputEmailToLine	To line for outbound email.

Inbound Email Database Operations Business Service

This business service performs database-level actions.

Table 10 shows methods and input arguments, with descriptions, for this eMail Response business service.

Table 10. Inbound Email Database Operations Methods and Input Arguments

Method	Input Argument	Description
AttachFile		Creates an attachment record.
	BusComp	Name of attachment business component.
	BusObj	Name of business object.
	ErrorMessage	The error message if an error occurs during method execution.
	FatalErrCode	The error code if a fatal error occurs during method execution.
	FileName	Name of the file to attach.
	FilePath	Path of the file to attach.
DeleteRecord		Deletes a record.
	BusComp	Name of business component from which to delete a record.
	BusObj	Name of business object.
	ErrorMessage	The error message if an error occurs during method execution.
	FatalErrCode	The error code if a fatal error occurs during method execution.
	Id	ID of the record being deleted.

Table 10. Inbound Email Database Operations Methods and Input Arguments

Method	Input Argument	Description
ExpandBCTemplate		Substitute values in a template.
	BusComp	Name of business component used to get values for template substitutions.
	ReplyMessage	Reply message with substituted values.
	ReplyTemplate	Reply template.
FindRecord		Finds a record. This method respects the CaseInsensitive parameter in the CFG file. The CFG file is configured to perform case-sensitive searches by default. If you want to change this parameter to case-insensitive to search for an email address, you clear the checkbox for the Use Default Sensitivity property in the Email Address field of the Mail Agent Contact business component.
	BusComp	Name of business component from which to find a record.
	BusObj	Name of business object.
	ErrorMessage	The error message if an error occurs during method execution.
	FatalErrCode	The error code if a fatal error occurs during method execution.
	Id	ID of a record if it is found.
	QueryFields	List of comma-separated fields to query on. Query values are passed in additional arguments, with one argument per field.
	ValueFields	List of comma-separated fields from which to get values. Each field is passed back in one output argument, with the name set to the field name and the value set to the field value.
FindRecordEx		Used only by eMail Response for matching contacts when processing inbound emails. It finds all contacts in the Siebel database whose primary or alternate email address matches the From email address of the inbound email and then associates each contact found with the email activity record.

Table 10. Inbound Email Database Operations Methods and Input Arguments

Method	Input Argument	Description
GetFieldValues		Gets the field values from a record.
	BusComp	Name of business component from which to get record values.
	BusObj	Name of business object.
	ErrorMessage	The error message if an error occurs during method execution.
	FatalErrCode	The error code if a fatal error occurs during method execution.
	Id	ID of record from which to get values.
	IdField	The field on which to query for the ID.
	ValueFields	List of comma-separated fields from which to get values. Each field is passed back in one output argument, with the name set to the field name and the value set to the field value.
GetRecordList		Get a list of records.
	BusComp	Name of business component from which to get record values.
	BusObj	Name of business object.
	ErrorMessage	The error message if an error occurs during method execution.
	FatalErrCode	The error code if a fatal error occurs during method execution.
	NumberofRows	Number of records returned. Default is `10`.
	QueryFields	List of comma-separated fields on which to query. Query values are passed in the additional argument fields (one argument per field.)
	ValueFields	List of comma-separated fields from which to get values. Each field is passed back in one output argument, with the name set to the field name and the value set to the field value.

Table 10. Inbound Email Database Operations Methods and Input Arguments

Method	Input Argument	Description
InsertRecord		Insert a record.
	BusComp	Name of business component to insert record into. Each field value to be set is passed as an additional input argument with the name set to Field: followed by the field name.
	BusObj	Name of business object.
	ErrorMessage	The error message if an error occurs during method execution.
	FatalErrCode	The error code if a fatal error occurs during method execution.
	Id	ID of the new record if the insert is successful.

How the Internet SMTP/POP3 Driver Processes Email Messages

This section contains some information about email directories, driver parameters, and an overview of how the Internet SMTP/POP3 Server driver processes email messages. For details about the directories and driver parameters included in this section, see *Siebel Communications Server Administration Guide*.

Email Directories and Driver Parameters

When the Internet SMTP/POP3 Server driver starts, it creates the following directories and by default puts them in the bin subdirectory, if they do not exist. By default, the following directories are created:

- Failed
- Incoming
- Loopback
- Processed
- Sent

If you do not wish to store messages in the bin subdirectory, you can specify a different location by changing the values for the communications driver parameters. To change the locations where messages are stored, navigate to the Communications Administration screen and select the Communications Drivers and Profiles view. In the Driver Parameters list, choose one of the following parameters for the directory location that you want to change, and type a directory path in the Default Value column.

- Failed Email Directory
- Incoming Email Directory
- Loopback Email Directory
- Processed Email Directory
- Sent Email Directory

The following parameters control how incoming and outgoing messages are processed:

- Delete Processed Messages
- Save Sent Messages
- Return Attachments
- Process If Loopback Detected

You can change how these email messages are processed by changing the Default Value of a driver parameter. For example, if you do not want to return attachments, change the default value to FALSE.

An Overview of the Processing Flow of Inbound Email Messages

When the Internet SMTP/POP3 Server driver starts, it creates required directories such as Incoming Email. The Internet SMTP/POP3 Server driver also creates a thread that polls the POP3 server. The PollingInterval driver parameter controls the frequency at which the Internet SMTP/POP3 Server driver checks the POP3 server for messages.

If there are messages, the Internet SMTP/POP3 Server driver retrieves and processes them one at a time, up to a maximum per session equal to the value set in the POP3 Batch Size driver parameter. If the current session with the POP3 server terminates abnormally, all messages previously retrieved, processed, and deleted during the current session will be restored, retrieved, and processed again the next time the Internet SMTP/POP3 Server driver connects to the POP3 server. The smaller the value POP3 Batch Size driver parameter, the fewer duplicate messages will be created and processed if a restart occurs.

Messages in a session are processed as shown in the following steps:

1 A message is saved in the Incoming Email directory.

2 The POP3 DELE command deletes the message from the POP3 server.

If the DELE command fails, the message stored in the Incoming Email directory is erased because it will be retrieved again in the next POP3 session.

NOTE: You should not have other email clients accessing the mailboxes that eMail Response is monitoring because the email driver deletes the messages from the POP3 server when they are processed by eMail Response. As such, these messages will not be visible from another client.

---

3 The disk based message is parsed. The parsing produces the following files in the Incoming Email directory:

   a OriginalMessageText_[*the original header of the message along with all text parts concatenated together*].txt.

   b Any attachments parsed from message are given unique names in the following format:

   ATT_[*the original header of the message along with all text parts concatenated together*].DAT.

   c Any remaining text or HTML fragments are turned into attachments and are given unique names in the following format:

   ATT_[*the original header of the message along with all text parts concatenated together*].DAT.

4 If an error occurs when the message is parsed, the following events occur:

   a A temporary file in the following format is moved to the Failed Email directory and any attachments created are deleted:

   pop3_[*the original header of the message along with all text parts concatenated together*].tmp

   b The POP3 session is immediately terminated with a QUIT command so that the offending message is permanently deleted from the server.

5 If the Loopback Detection Interval parameter value is greater than zero and the message sender is currently being blocked, the following events occur:

   - If the Process If Loopback Detected parameter value is FALSE, the message is moved to the Loopback Email directory.
   - If the Process If Loopback Detected parameter value is TRUE, the driver's Loopback Candidate flag is set to TRUE and the message continues processing.

6 If the message is not moved to the Loopback Email directory or flagged as a loopback candidate, the pop3_[*the original header of the message along with all text parts concatenated together*].tmp file is processed as follows:

- If the Delete Processed Messages parameter value is TRUE, the temporary file is deleted.
- If the Delete Processed Messages parameter value is FALSE, the temporary file is moved to the Processed Email directory.

7 The primary message text, header information (subject, to, cc, date, and so on), Loopback Candidate flag, and references to the attachments are passed to the driver's creator (usually Communications Inbound Manager, or CIM).

8 The OriginalMessageText file and all the attachments are not deleted by the SMTP/POP3 driver. It is the responsibility of the workflow invoked by CIM to delete all the attachments.

CAUTION: Any errors that occur in the workflows may strand the ATT_OriginalMessageText files in the Incoming Email folder. If this occurs while CIM is not running, the workflow invoked by CIM failed to process a message event. The safe way to determine if an ATT_OriginalMessageText file can be deleted is to stop CIM and then look at the contents of all the queued CIM Events in all response groups to make sure that the ATT_OriginalMessageText files are no longer being referenced.

eMail Response Internally Generated Attachment Processing

The following sections describe how Siebel eMail Response generates attachments when inbound mail comes in and when outbound mail goes out.

Attachments Created When Inbound Email Is Received

Siebel eMail Response generates internal attachments upon receipt of plain text or HTML emails. These internally generated attachments appear in addition to any external attachments associated with the email by the email sender. Table 11 describes the attachments created. When a plain text email is received into eMail Response, one internally generated attachment is created called Original Message.txt. This contains the MIME format of the message as received by the SMTP/POP3 driver. When an HTML email is received in eMail Response, two internal attachments are generated: the Original Message.txt and texthtml.htm, which contains the email in HTML formatting. This attachment is essentially the same as the incoming email message seen in the Incoming Message form or the Outgoing Message form (when user preferences are set as follows: Default Message Format = HTML, Original Message is Included in Reply = TRUE). No internally generated attachment is sent with a Reply, Reply to All, or Forward message.

Table 11. Incoming Email Attachments

Incoming Email Format	Attachments Created
HTML	texthtml.htm Original Message.txt
Plain Text	Original Message.txt

Attachments Created When Outbound Email Is Sent

When sending outbound emails, internally generated attachments are created for those outbound emails whose message size is greater than 16KB (~15000 characters). These internally generated attachments are called SiebelLongEmailBody and are stored with the email activity record in the Siebel application but are not sent with the outbound message. Table 12 describes what kind of attachments are created. Whether or not the email is greater than or less than 16KB, the outgoing message will contain the entire email in the body of the message without any internally generated attachments. This attachment is created so that any message of greater than 16KB can be stored in the Siebel file system because there is a database limitation of 15000 characters for any email. Additionally, this attachment allows the entire text of the email to be visible in the Outgoing Message form and sent to the email recipient in the body of a single email message.

Table 12. Outgoing Email Attachments

Default Message Format	Attachments Created for Email greater than 16KB
HTML	SiebelLongEmailBody.htm
Plain Text	SiebelLongEmailbody.txt

NOTE: Default Message Format is set in the Outbound Communications view of the User Preferences screen. For more information about setting user preferences, see *Siebel Call Center User Guide*.

Upgrading to Siebel eMail Response Release 7.x

This section describes some upgrade features and provides information about upgrade preparations. It is recommended that you export and save the configuration values discussed in this section. You will need these configuration parameters when you configure new elements after the upgrade.

For general upgrade information used primarily by System and Database administrators, see the *Upgrade Guide* for your operating system.

Siebel eMail Response Business Services and Workflow

Release 7.x of eMail Response uses the Workflow Process Manager business service to call all workflow processes. Other business service methods can be called from within the workflows. The following business services used by eMail Response will migrate from Release 6.x to Release 7.x, with exceptions noted:

- **Inbound Email Manager.** Customization of this business service will migrate but customization of its methods will not migrate.

  In Release 7.x, the CreateRecord and ProcessServiceRequest methods have been incorporated into workflow processes. These method names will not be in the Inbound Email Manager business service.

  Any modifications you made to the CreateRecord and ProcessServiceRequest methods will need to be reentered by you in the eMail Response - Process Message and eMail Response - Process Service Request workflows, respectively.

- **Inbound Email Database Operations.** Customization of this business service will not be migrated.

- **Outbound Communications Manager.** Customization of this business service will not be migrated.

Response Groups and Input Arguments

Existing input arguments and default input arguments for response groups will be imported. Before upgrading, export your input arguments for all 6.x business services and methods to a file and save it.

Customized Mail Agent Business Components from Release 6.x will migrate, but the business components will be used in workflow steps instead of being specified as input arguments to the response group. After Upgrading, customers should perform the following tasks on all eMail Response workflows:

- Change the business service to Workflow Process Manager and the method to Run Process.
- Delete all input arguments, and add a single argument called ProcessName. In the input argument value field for ProcessName,
  - Type `eMail Response - Process Message` to replace CreateRecord (Inbound Email Manager business service)
  - Type `eMail Response - Process Service Request` to replace ProcessServiceRequest (Inbound Email Manager business service).

If response groups called workflow processes in Release 6.x, you may be able to use them with modifications. Depending on the number of changes to the workflows, it may be easier to use a standard workflow that accomplishes the same task.

Response Properties

Response properties have been replaced by the ParseText method on the Inbound Email Manager business service. This method uses one fixed input argument (Text) that specifies the text for which you are looking and one input argument for each response property that you want to parse. For example, for the Text input argument Service Request#:, the response property is 24-57689.

- The name of this additional input argument is customer-specified, and it corresponds to an output argument of the same name that will contain the parsed property value. For more information, see "Siebel eMail Response and Business Services" on page 156.

Siebel eMail Response Templates

Templates from Release 6.x will be migrated during your upgrade. In Release 7.x, recipient groups control the substitution fields that are available for templates. Therefore, your templates will have to be recreated if the substitution fields no longer exist. To make sure the imported templates are accurate, you may need to recreate your templates in Release 7.x. You can copy and paste text from an old template into a new one. The following list contains information about specific types of templates:

- Release 99.5 templates (such as Submit - OK, Submit - Error, Logon Failure, and so on) have been replaced by standard templates and are no longer specified as input arguments. For example, the Submit - OK template is now the eMail Response - SR Submit template.
- Four default templates have been added to the seed data and will not be migrated: Srapage.txt, srmail.txt, Srnpage.txt, and srresolve.txt.
- Additional customer-created message templates, such as those for Send Email, should be upgraded manually by adding them to the template table and changing the macro to the following format:
  - Use a start bracket ([) and an end bracket (]) instead of percent signs (%) to enclose the macro.
  - Add the business component name in front of the field name. For example, enter Service Request.SR Number instead of SR Number.

Siebel eMail Response Communications Drivers (Adapters) and Profiles

Make sure you export all the values for adapters and profiles in your current communication configuration. You will need these configuration parameters when you configure drivers in Release 7.x.

- Some drivers (called adapters in previous releases) that were available in Release 6.x are not supported in Release 7.x, including Extended MAPI, Microsoft Exchange Server, and Microsoft SMTP Service. Profiles that used these adapters will need to be recreated using the Internet SMTP/POP3 server driver. Use the exported values file to create new drivers.
- Profiles using the Internet SMTP/POP3 Server Adapter in 6.x will upgrade to the Internet SMTP/POP3 server driver. There are new parameters, but they are not required. For information about new parameters, see *Siebel Communications Server Administration Guide*.
- Profile parameter overrides will not migrate. Use the exported values file to recreate these profiles.

My Incoming Email and All Incoming Email Views

If you customized your My Incoming Email and All Incoming Email views in Release 6.x, your changes will not migrate to Release 7.x. The same functionality exists in Release 7.x, but you will need to customize your My Communications, My Team's Communications, and All Communications views after you install Release 7.x.

Index

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

T

U

V

W

X