



SIEBEL[®] 7
eBusiness

SIEBEL eSERVICE ADMINISTRATION GUIDE

VERSION 7.5, REV. A

12-FRLSJI

JUNE 2003

Siebel Systems, Inc., 2207 Bridgepointe Parkway, San Mateo, CA 94404
Copyright © 2003 Siebel Systems, Inc.
All rights reserved.
Printed in the United States of America

No part of this publication may be stored in a retrieval system, transmitted, or reproduced in any way, including but not limited to photocopy, photographic, magnetic, or other record, without the prior agreement and written permission of Siebel Systems, Inc.

The full text search capabilities of Siebel eBusiness Applications include technology used under license from Fulcrum Technologies, Inc. and are the copyright of Fulcrum Technologies, Inc. and/or its licensors.

Siebel, the Siebel logo, TrickleSync, TSQ, Universal Agent, and other Siebel product names referenced herein are trademarks of Siebel Systems, Inc., and may be registered in certain jurisdictions.

Other product names, designations, logos, and symbols may be trademarks or registered trademarks of their respective owners.

U.S. GOVERNMENT RESTRICTED RIGHTS. Programs, Ancillary Programs and Documentation, delivered subject to the Department of Defense Federal Acquisition Regulation Supplement, are “commercial computer software” as set forth in DFARS 227.7202, Commercial Computer Software and Commercial Computer Software Documentation, and as such, any use, duplication and disclosure of the Programs, Ancillary Programs and Documentation shall be subject to the restrictions contained in the applicable Siebel license agreement. All other use, duplication and disclosure of the Programs, Ancillary Programs and Documentation by the U.S. Government shall be subject to the applicable Siebel license agreement and the restrictions contained in subsection (c) of FAR 52.227-19, Commercial Computer Software - Restricted Rights (June 1987), or FAR 52.227-14, Rights in Data—General, including Alternate III (June 1987), as applicable. Contractor/licensor is Siebel Systems, Inc., 2207 Bridgepointe Parkway, San Mateo, CA 94404.

Proprietary Information

Siebel Systems, Inc. considers information included in this documentation and in Siebel eBusiness Applications Online Help to be Confidential Information. Your access to and use of this Confidential Information are subject to the terms and conditions of: (1) the applicable Siebel Systems software license agreement, which has been executed and with which you agree to comply; and (2) the proprietary and restricted rights notices included in this documentation.

Contents

Introduction

How This Guide Is Organized	6
Revision History	7

Chapter 1. About Siebel eService

The Customer's View of Siebel eService	11
The Call Center Agent's View of Siebel eService	13
Additional Features of Siebel eService	14
Siebel eService Installation	15
Application Security Framework for Siebel eService	16
Siebel eService Deployment	17

Chapter 2. Configuring Siebel eService

Upgrading to Siebel eService 7.5	20
Customizing the Look and Feel of Siebel eService	21
Setting Up Customer Satisfaction Surveys	24
Setting Up Autocreation of Attachments for Siebel eService	25

Chapter 3. Administering Siebel eService

The Process of Administering Siebel eService	28
Setting Up the Siebel eService Security Framework	29
Authentication for Siebel eService	29

Access Control for Siebel eService	30
Data Privacy for Siebel eService	31
Setting Up Service Request Entitlements	32
Setting Up Email Notification for Siebel eService	35
Setting Up the Knowledge Base for Siebel eService	40
Setting Up FAQs for Siebel eService	40
Setting Up Siebel eSmartScripts for Siebel eService	43
Setting Up Siebel Smart Answer for Siebel eService	44
Setting Up Downloads, Documentation, and Product Literature	45
Administering Web Access for Siebel eService	48
Setting Up Siebel eSearch for Siebel eService	51
Setting Up Contact Us	52
Setting Up Branch Locator	53
Setting Up Email, Fax, Mail, and Phone Accounts for Siebel eService	58
Setting Up Siebel eCollaboration for Siebel eService	61
Setting Up Siebel Communications Server	61
Setting Up Asset Management	62
Setting Up Warranties	62
Setting Up Product News	64
Setting Up Recommended Services	66
Administering Customer Satisfaction Surveys	68
Personalizing Siebel eService	69
Setting Up Siebel Self-Service Wireless	69

Index 71

Introduction

This guide provides an overview of Siebel eService and its use from an employee and customer perspective. The primary focus of this guide is to provide configuration and administration instructions for Siebel eService.

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

Call Center Administrators	Persons responsible for setting up and maintaining a Call Center. Duties include designing and managing Computer Telephony Integration (CTI), and SmartScripts. Also persons responsible for message broadcasts.
Database Administrators	Persons who administer the database system, including data loading, system monitoring, backup and recovery, space allocation and sizing, and user account management.
Marketing Administrators	Persons responsible for setting up and maintaining a marketing department. Duties include designing and managing campaigns, product marketing information, and product distribution lists.
Siebel Application Administrators	Persons responsible for planning, setting up, and maintaining Siebel applications.
Siebel Application Developers	Persons who plan, implement, and configure Siebel applications, possibly adding new functionality.
Siebel System Administrators	Persons responsible for the whole system, including installing, maintaining, and upgrading Siebel applications.

How This Guide Is Organized

This guide provides information necessary to implement, configure, and monitor Siebel eService, with particular detail provided for application setup and administration.

Read [Chapter 1, “About Siebel eService”](#) for an overview of eService functionality including a look at eService from the perspective of a customer and from that of a Call Center agent.

Read [Chapter 2, “Configuring Siebel eService”](#) for information on setting up your eService Web site with Siebel Tools. This chapter will be of most interest to a Siebel Application Developer, or a Web Designer.

Read [Chapter 3, “Administering Siebel eService”](#) once you have implemented the tasks necessary to set up your Web site. The administration tasks detailed in this chapter will be of most interest to a Siebel Application Administrator, Siebel System Administrator, Siebel Web Delegated Customer Administrator, and Call Center Agents.

Revision History

Siebel eService Administration Guide,

Version 7.5, Rev. A

Table 1. Changes Made in Version 7.5, Rev A

Topic	Revision
“Setting Up Email Notification for Siebel eService” on page 35	Added note about enabling Email Manager.
“Creating the eService Catalog” on page 40	Added this section.
“Activating the Email Password Button” on page 60	Added this section.
“Setting Up Siebel eCollaboration for Siebel eService” on page 61	Added this section.

Siebel eService provides a Web portal where customers can access service information and a knowledge base. Siebel eService users can view details of any portion of the portal application by drilling down on hyperlinks.

NOTE: You may have purchased either Siebel eService or Siebel eCustomer, which provides both service and e-commerce functionality. All references to Siebel eService in this book are also applicable to the service-related functionality in Siebel eCustomer.

The major features of this portal are:

- **User Login.** The user registration process for Siebel eService is designed for both anonymous and registered Web users. Anonymous visitors to the Siebel eService site can only view the FAQs, search the knowledge base, and use the self-diagnostic tools. These anonymous users can register, create their personal profiles, and then gain full access to additional Siebel eService capabilities including creating service requests and registering products.
- **Salutation.** The eService salutation area displays text messages based on personalization rules. For example, you can greet users by name and alert them to any new product news. The end result is that users are immediately reminded of information relevant to them, and guided to the right section of the Web site.
- **Recommended Items.** You can personalize the recommended items area of the portal to recommend products based on user attributes such as the products the user has previously purchased or registered.

- **Contact Us.** Siebel eService allows customers to communicate with organizations through a variety of communication channels, such as telephone, email, online chat, Voice Over IP, face-to-face communications, and postal mail. The links associated with Contact Us make these channels available. The persistent, global Contact Us button on every eService page also allows customers to choose any communication channel to interact with your business.
- **My Account.** Customers' personal and company-specific information includes service requests, orders, billings, and registered products. Siebel eService allows customers to manage the entire lifecycle of their products. By registering and tracking their products, customers can receive product news or literature, track warranty agreements, receive recommendations on scheduled services, and submit and track service requests related to their products. They can check their outstanding order status, including returns, exchanges, and repairs. In addition, they can check their billing history and make payments online.
- **Self Service.** Siebel eService includes an integrated, searchable knowledge base. Troubleshooting links provide access to a wide variety of support and service tools. Siebel eService customers can also access helpful "How To" instructions, and they can browse and obtain downloads and documentation.
- **Ask a Question.** Customers can use Siebel Smart Answer to search the solution knowledge base using natural language and to provide feedback to the "self-learning" knowledge base engine.
- **Top FAQs list.** Customers can select from a list of the most common support questions.

The Customer's View of Siebel eService

Customers logging into a Siebel eService Web site will find a portal that offers self-service and assisted service, including:

- **Service Request Management.** Submit and track service requests for issues, problems, and product repairs, returns or exchanges. The customer can attach documents to help communicate a service issue. A service agent can add solutions or documents relating to the problem. Workflow process can be activated to notify a customer by email whenever an agent updates a service request.
- **Order Tracking.** Track the status of all orders, including purchase, RMA Advance exchange, RMA repair return, RMA return, repair, sales, service, and eSales orders.
- **Manage Assets.** Manage products through their entire life cycle. Register products, receive product news and literature, track warranty agreements, and receive recommendations on scheduled services.
- **Searchable Knowledge Base.** Access an integrated, searchable knowledge base that consists of knowledge items such as solutions to problems, product news, resolution documents, downloads, documentation, literature, and general documents. Knowledge retrieval methods include full-text search, natural language search, database query, or navigation through the hierarchical knowledge categories.
- **Full Text Search.** Search for information throughout the eService site. Search results are ranked by relevancy and personalized visibility.
- **Smart Answer.** Perform natural language searches to retrieve knowledge base data.
- **Interactive Troubleshooting Instructions.** Troubleshoot problems or view instructions on how to perform a task.
- **Branch Locator.** Locate the nearest retail or service locations and receive map and directions from an online map service provider.

- **Live Collaboration with Customer Care Representatives.** Share Web pages, documents, presentations, or any other desktop imagery in real time. Customers converse by their preferred channel, for example telephone, Voice over IP (audible speech over the Internet), or text chat (written communication over the Internet).
- **Billing.** View billing status, make payments, and resolve billing disputes over the Web without having to call a customer service agent. The View Bills link gives customers real-time access to bill history and detail. The Pay Bills link allows customers to pay bills using a variety of payment methods, including credit card and debit/checking accounts. Customers can also dispute a bill online by requesting an adjustment.

The Call Center Agent's View of Siebel eService

Siebel eService helps Call Centers by allowing customers to serve themselves, giving Call Center agents more time to service higher-value issues over the phone. Call Center agents will typically perform the following functions to help eService customers:

- Create and update eService users' login names and passwords. This process typically would require the agent to be authenticated by a directory such as Netscape Directory Server or Microsoft Active Directory using the Siebel security adaptor.
- Engage in an eCollaboration session. Based on the customer's preferred method of communication—text chat, Voice over IP, or phone line call back—Web requests are queued and routed to the appropriate service agent with real-time screen pops.
- Run the same eSmartScripts used in eService while talking on the phone with customers.
- Respond to email submitted through eService. Agents can view their inbound email queues and then, for each message, view related customer, account, service request, and opportunity profiles, as well as any attachments. Agents use templates in the solution knowledge base to compose customized replies to inbound emails.
- Add newly purchased warranties to customer assets. Agents may also add newly purchased customer assets to a customer's asset list.
- Receive service requests submitted by customers using eService and assigned by Siebel Assignment Manager.
- Access user history that is independent of the channel of communication the user chooses.

Additional Features of Siebel eService

Siebel eService has these additional features:

- **Integration Into Existing Web Site.** You can customize Web pages, views, applets, and cascading style sheets to conform to your business model and the look and feel of your Web site.
- **Personalization.** You can apply custom rules to applets and views so that dynamic content can be further personalized to meet each individual's profile. A salutation applet that greets a registered user upon login can contain content such as promotions, service request update information, or a birthday greeting.
- **Service Entitlement.** By turning on entitlement verification, you can restrict your eService customers from viewing and creating service requests if they do not hold valid service entitlements.
- **Web Delegated Customer Administration.** In a business-to-business scenario, you can create Web delegated customer administrators at the customer company, who can create and modify user profiles such as login IDs and passwords for their accounts through the eService site, reducing the administrative load at your host company.
- **Data Visibility Controls.** Based on the user's account, responsibilities, organization, or access groups, you can control the views and data exposed to your eService end users.
- **Email Notification.** By using Siebel Workflow, you can create rules to notify customers of changes in the status of their service requests or expired warranties through email.

Siebel eService Installation

Components required to install Siebel eService are:

- **Database Server.** For a list of supported Database Server platforms, including version, and connectivity software information, see *Siebel System Requirements and Supported Platforms*.
- **Siebel Enterprise Server.** For a list of Siebel Enterprise Server requirements, see *Siebel System Requirements and Supported Platforms*.
- **Web Server.** For a list of supported Web Servers, including Vendor and hardware software configuration information, see *Siebel System Requirements and Supported Platforms*.
- **Siebel Sample Database (optional).** For directions on installing a Sample Database, see *Release Notes*.

For complete instructions on installation of these components see one of these guides:

- *Siebel Server Installation Guide for Microsoft Windows*
- *Siebel Server Installation Guide for UNIX*

Application Security Framework for Siebel eService

To establish a secured application security framework, you need to decide which application functionality and data content will be for public access and which will be accessible to your registered customers. You will need to authenticate registered users and control the data and functionality each authenticated user can access, to protect privacy and avoid conflicts.

You typically set up a security framework with the following features:

- **Anonymous use.** Set up your eService Web site to allow limited use by nonregistered users.
- **Registration.** Set up a means to allow nonregistered users to register on your eService Web site.
- **Authentication.** Set up a means to store and then authenticate the password and user name data of your registered users.
- **Access Control.** Set up a means to control user access to views and data within your site.

For more information on authentication and access control, see *Security Guide for Siebel eBusiness Applications*.

Siebel eService Deployment

Once Siebel eService has been installed, you can configure, administer, and deploy it as an integrated part of your corporate Web site.

Configuration

Using a text editor or HTML authoring tool, you can modify the preconfigured Siebel Web templates (.SWT files) and .css files to integrate the appropriate corporate layout and formatting. For example, you may change the background color, font size, and decide not to use HTML frameset.

Using Siebel Tools, you can configure Siebel eService to fit your business requirements. For more details about configuration, see *Siebel Tools Reference*.

For more information, see [Chapter 2, “Configuring Siebel eService.”](#)

Administration

Once the configuration of eService is complete, the Siebel application administrator can set up the eService functionality that will be accessed by end users. Administration tasks include publishing FAQs and setting up the Knowledge Base. These tasks also include setting up Branch Locations.

For a full list of administration tasks, see [Chapter 3, “Administering Siebel eService.”](#)

Launching the Web Site

Once the configuration and administration tasks are complete, the Siebel application developer can work with the general Webmaster who can help integrate the Siebel eService application into your existing Web site.

Typical tasks include:

- Creating a new virtual directory on the Web Server for Siebel eService.
- Copying new HTML and images to the public directory on the Web server machine.
- Adding a new link from your existing Internet or intranet site to the application.

You can use Siebel Tools to perform the following tasks to modify Siebel eService to fit your business requirements:

- Configure Siebel business components, applets, views, and all other elements of a Siebel application as needed, such as setting declarative properties or adding Web scripts.
- Create new controls, applets, views, or Web pages as needed.
- Associate applets, views, and Web pages with the appropriate Web templates (.SWT files).
- Map the fields, controls, and applets to the placeholders in the appropriate template.
 - Fields and controls are mapped into an applet.
 - Applets are mapped into a view.
 - Views are mapped into a Web page (a Web page container).
- Compile the repository changes into an .SRF file.

This chapter provides an overview of configuring Siebel eService. For more information, see *Siebel Tools Reference*.

Upgrading to Siebel eService 7.5

The process of upgrading Siebel eService 6.X or 7.X to the Siebel 7.5 environment adheres to the same general guidelines documented in the following upgrade guides:

- *Upgrade Guide for UNIX*
- *Upgrade Guide for Windows*

For Siebel eService, the three general steps are:

- **Upgrade repository.** Use Siebel Application Upgrader.

The majority of the Siebel eService application definition is stored in the repository as declarative objects and attributes such as Siebel Business Objects, Components, Applets, Views, and Web template mappings. The Siebel Application Upgrader will automatically upgrade the Siebel eService Web application definition with customization carried forward and conflict resolution rules applied. You may also review and optionally override the conflicts detected in the upgrade process.

- **Upgrade Web templates.** This step is only required if you want to take advantage of the new 7.5 SWE tags.

Siebel 7.5 Web Engine is backwards-compatible with Siebel 6.X and 7.X. The 6.X and 7.X Web templates can be reused without modification in Siebel 7.0. The 6.X tags are fully supported by the Siebel Web Engine 7.5. To take advantage of the new Siebel 7 SWE tags, start with your customized Siebel 7.X templates and modify them, or you can take the standard Siebel 7.5 templates and customize your Web site.

- **Validate and test applications.**

After the upgrade process has been completed, you will want to validate the new merged repository and application before deploying into a production environment.

Customizing the Look and Feel of Siebel eService

You can customize the look and feel of your Siebel eService Web site to incorporate your company's brand identity. Your Siebel eService site is made up of customizable Web Templates (HTML files with a .swt extension) and Controls (such as buttons and drop-down lists).

Figure 1 shows a custom configured Siebel eService homepage integrated within Siebel's corporate Web site.

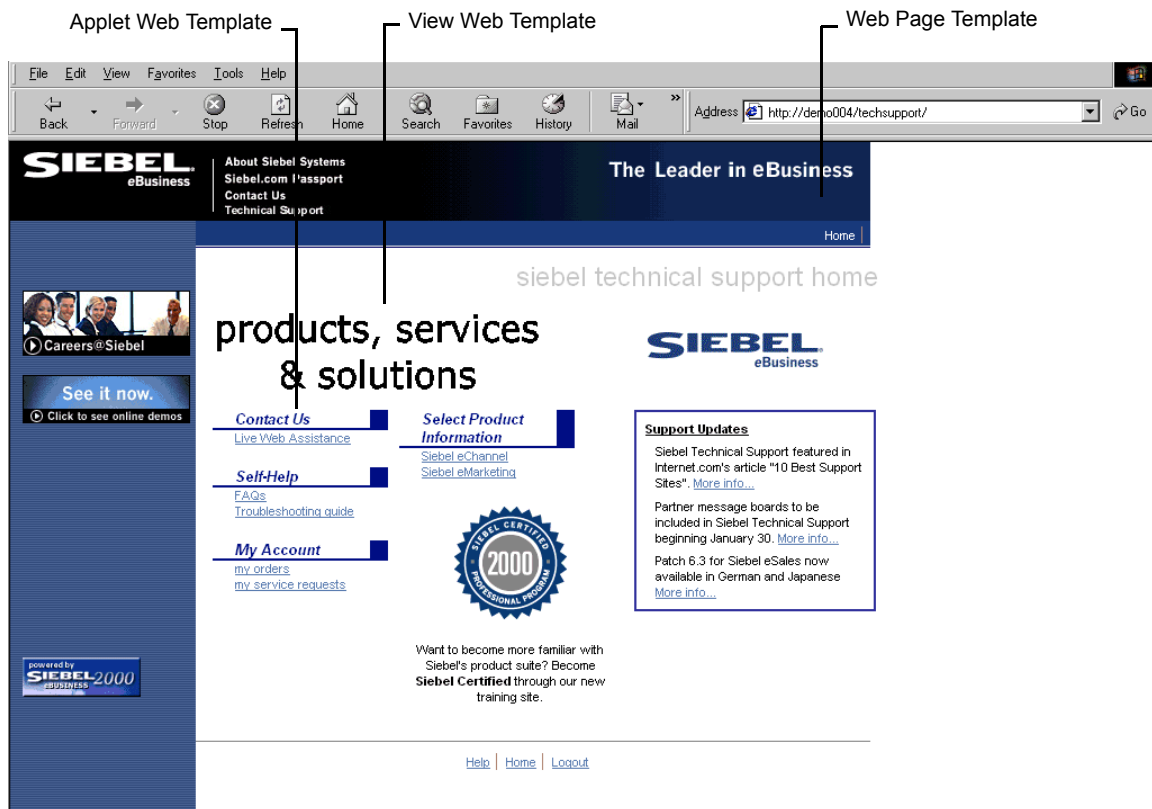


Figure 1. Custom Configured Siebel eService Homepage

Basic Methods for Customizing Siebel eService

Configuring Siebel eService applications is a modular process that separates style and structure (style sheets and Web templates) from the binding (HTML display objects) to data. Style and structure are reusable across multiple HTML display objects using Siebel Web templates. This allows propagation of style and structure modifications across all HTML display objects.

The typical steps for configuring the Siebel eService application are the following:

- Identify the Web pages, views, applets, and other elements of Siebel eService that you want to modify.
- Using an HTML or text editor, modify the Web templates (.SWT files) as necessary to incorporate appropriate corporate layout and formatting.
- Using Siebel Tools, associate each applet to an applet Web template, each view to a view Web template, and each Web page to a page Web template.
- Using Siebel Tools, configure HTML Display Objects (controls, applets, and views).
 - Define new applets, views, and Web pages for Siebel eService.
 - Define drilldowns where appropriate, such as from summary views to detail views.
 - Establish mapping between controls and list columns to corresponding placeholders in the applet Web templates.
- Compile the repository changes into an .SRF file.
- Test and debug the application.

General Elements of Siebel eService Web Site

Your Siebel eService application includes a core set of HTML templates and style sheets that control the look and feel. Additionally, there is a core set of object definitions that are grouped together into different layers depending on the object's function and characteristics. You modify Siebel Web templates and style sheets using a text editor or a raw code HTML editor. You modify Siebel object definitions (controls) using Siebel Tools.

The general elements of your Siebel eService Web site are listed below. For information on working with Web templates, cascading style sheets, and controls, see *Siebel Tools Reference*.

- **Web Page Web Template.** Allows you to display persistent information such as Help, Logout links, or your Company logo.
- **View Web Template.** Defines the layout of the View that dictates how the applets will be mapped or placed.
- **Applet Web Template.** Defines the layout of the Applet which dictates how the controls and fields will be mapped or placed.
- **Cascading Style Sheets.** Control the color schemes and other styles in the Siebel Web templates. You can modify the rules-defined style sheet to customize the appearance of your Siebel eService application.
- **Controls.** One control object definition, set up in Tools, corresponds to one data control in an applet, such as a text box, check box, or command button. A control is something in the applet with which the user can interact. A control usually either exposes data from one field in the business component, or invokes programming logic.

Changing Text in Home Page View (eService) View

You can change the "Service & Support" displayed text in the Home Page View (eService) view.

To change the text in Home Page View

- 1 Navigate to the Applet Object Definition in Siebel Tools and query for the Home Page Header Tiny Applet.
- 2 Review the content of the Title property.

```
<table cellpadding="0" cellspacing="0"><tr><td width="50%"><hr
size="1" class="PageRule"></td><td nowrap
class="PageHeader">Service & Support</td><td width="50%"><hr
size="1" class="PageRule"></td></tr></table>
```

- 3 Modify the content as desired, and then compile and test the changes.

Setting Up Customer Satisfaction Surveys

The Siebel eService Customer Satisfaction survey allows you to obtain customer feedback through customer self-service means. Two types of surveys exist within Siebel eService:

- The general survey that solicits user feedback on the overall Web site experience.
- The Service Request survey that solicits feedback on a particular service request that the user has submitted. This type of survey is accessible through the Service Request's detailed view. You can analyze the survey results and generate a report with Siebel Call Center.

To modify the Siebel eService Customer Satisfaction Survey questions and labels, you need to use Siebel Tools to configure control properties of the Customer Survey applet. For instructions on how to administer the values contained in your Customer Satisfaction Survey, see [“Administering Customer Satisfaction Surveys” on page 68](#).

To configure control properties

- 1** Launch Siebel Tools.
- 2** From the Object Explorer window, select Applet.
The Applets window appears.
- 3** From the Applets window, query and select Customer Survey Applet (eService).
- 4** From the Object Explorer window, open the Applet object and select Control.
The Controls window appears.
- 5** Select the control you want to change and edit its Caption field, which contains the survey label text.
The changes you make here will be reflected in your user interface.
- 6** Compile the new changes into a new SRF file.

Setting Up Autocreation of Attachments for Siebel eService

When filling out a service request, Siebel eService users can use the Description field to describe their issue. When the description is greater than the configured number of words (the default is 2,000 characters), Siebel eService automatically creates a text file attachment and stores the file. You can also map this Description field to any database column (such as the extension column) with a character maximum of any specified number, defined by the database table.

To modify this functionality, use Siebel Tools to configure the Max Description Length user property of the Service Request (eService) business component, and specify a value for the maximum limit of characters for the auto file attachment creation. For instructions on mapping business component fields to database fields other than the default ones, see *Siebel Tools Reference*.

NOTE: The Auto-created attachment file has the naming format: <SR Number>_<Login Name>.txt.

To configure max description length buscomp

- 1** In the Object Explorer window, select Business Component.

The Business Components window appears.

- 2** From the Business Components window, query and select Service Request (eService).

- 3** From the Object Explorer window, open the Business Component User Prop object.

The Business Component User Properties window appears.

- 4** Select the Value field, and edit the number as needed.

- 5** Compile the new changes into a new SRF file.

Administering Siebel eService

3

After configuring Siebel eService, you must perform administration tasks to make Siebel eService functionality available to users.

Administration of Siebel eService is performed through the Siebel Call Center client in real time. This means that any new setup or change to the Siebel eService system (for instance, a newly published FAQ) will automatically be seen by all users who have access to it.

NOTE: All procedures in this chapter take place in the Call Center Client, unless otherwise noted at the beginning of the procedure.

The Process of Administering Siebel eService

To make all features of Siebel eService available to customers, perform the following administration tasks:

- [“Setting Up the Siebel eService Security Framework” on page 29](#)
- [“Setting Up Service Request Entitlements” on page 32](#)
- [“Setting Up Email Notification for Siebel eService” on page 35](#)
- [“Setting Up the Knowledge Base for Siebel eService” on page 40](#)
- [“Administering Web Access for Siebel eService” on page 48](#)
- [“Setting Up Siebel eSearch for Siebel eService” on page 51](#)
- [“Setting Up Contact Us” on page 52](#)
- [“Setting Up Asset Management” on page 62](#)
- [“Administering Customer Satisfaction Surveys” on page 68](#)
- [“Personalizing Siebel eService” on page 69](#)
- [“Setting Up Siebel Self-Service Wireless” on page 69](#)

Setting Up the Siebel eService Security Framework

The Siebel eService security framework can be divided into three primary areas:

- [“Authentication for Siebel eService” on page 29](#). Authentication includes user management and user authentication, supporting the new user creation process, and the third-party authentication mechanism, such as Netscape LDAP Directory Server or Microsoft Active Directory Server.
- [“Access Control for Siebel eService” on page 30](#). Access control allows categorization of database content and association of the content to specific access groups, and restricting of certain user groups’ access to sensitive data.
- [“Data Privacy for Siebel eService” on page 31](#). Data privacy supports communication and data transfer through the Internet.

Authentication for Siebel eService

The user management and authentication processes control access by both anonymous users and registered users.

- **Anonymous Users.** Unregistered visitors to your Siebel eService site may only view certain parts of it, such as the public knowledge base or the self-diagnostic tools. Unregistered visitors can register, create their personal profiles, and gain access to additional Siebel eService capabilities. Unregistered visitors can also obtain user IDs and passwords from customer care representatives.
- **Registered Users.** Users who are registered with your Siebel eService Web site will have their stored user IDs and passwords authenticated upon subsequent visits, and have access to views appropriate to the responsibilities assigned by your Siebel Administrator once they are logged into your site. For example, they might be able to create service requests, complete product registration, and view order status.

A Siebel administrator or customer care representative can:

- Add or create new user records and profiles
- Add or modify user IDs and passwords
- Edit existing user information, such as accounts

A Web Delegated Customer Administrator is a designated administrator at a customer company in a business-to-business scenario. This administrator has been assigned a Siebel responsibility that makes it possible to add or modify users for the account. This Siebel responsibility gives them access to the Siebel User Administration view.

User IDs and passwords are typically stored in an external authentication system such as the Netscape Directory Server. The Siebel security adapter interface and the appropriate [LDAP] parameter settings in the `eservice.cfg` file support the integration between Siebel eService and an external authentication system. With this support, registered users will be authenticated by your authentication system and then authorized to access the Siebel eService application.

For more information on user management and authentication support, see *Security Guide for Siebel eBusiness Applications*.

Access Control for Siebel eService

Siebel Systems allows companies to control user access based on the mechanisms listed in [Table 2](#).

Table 2. Access Control Mechanisms

Basis of Access	Access Control Mechanism
Application Functionality	Responsibility (Role)
Data Partitions	Organization
Group Membership	Access Community
Ownership	Position

For example, you can control user access to Siebel referential data, such as FAQs and eSmartScripts, so that a group of users can view specific FAQs or eSmartScripts. Such a process would involve the following steps:

- Create User Lists
- Create Access Groups
- Assign appropriate User Lists to Access Groups

- Create a Catalog and Categories for that Catalog
- Associate existing referential data, such as FAQs with the Catalog's categories
- Assign Access Groups to desired Categories

For more information on access control, see *Security Guide for Siebel eBusiness Applications* and *Siebel eSales Administration Guide*.

Data Privacy for Siebel eService

By using the Internet SSL and encryption technology, Siebel applications can support secured communication protocol. This technology also allows for the necessary protection to your transmitted data from a possible security breach such as network spooling.

For more information on Internet security with Siebel applications, see *Security Guide for Siebel eBusiness Applications*.

Setting Up Service Request Entitlements

Siebel eService provides service entitlement verification of registered users in addition to the standard contact authentication at login. If entitlement verification is active when a user tries to create, update, or view a service request, the application verifies that the user is a contact for a valid service entitlement. Without valid entitlement, users will not be able to create, modify, or view any service requests, including ones they may have previously created. Whether you implement entitlement verification depends on your business model.

If registered users receive different levels of support depending on their service entitlements, then entitlement verification is appropriate. If all registered users receive the same level of support, then entitlement verification is probably not necessary.

Entitlement verification of a registered user consists of the following:

- The registered user's Contact record must belong to the contacts list of an entitlement.
- The entitlement must currently be valid, that is, not expired.
- For a contact to be able to create or modify service requests, that contact must be added to a valid entitlement.

NOTE: A contact can only be added to an entitlement by an administrator or customer care representative in the host company. A Web Delegated Customer Administrator does not have access to the Entitlement Contacts table.

Entitlement verification is found in the SWE section of `\bin\eservice.cfg` file in the directory for the Siebel Server. Entitlement verification is set to `FALSE` by default.

To enable or disable entitlement verification

- 1** Open the `\siebsrvr\bin\eservice.cfg` file in the Siebel Server directory in any text editor.
- 2** Locate the line beginning with `Entitlement=`

- 3** Replace the current setting following the = sign to FALSE to disable entitlement verification, or to TRUE to enable entitlement verification.
- 4** Save eservice.cfg, retaining its format as a text file.
- 5** Reboot your Siebel Server service to have the new entitlement verification setting take effect.

To add a contact to an entitlement

- 1** From the application-level menu, choose View > Site Map > Agreements > All Agreements Across Organizations.
- 2** In the Agreements list, select the agreement to which the entitlement belongs and click the Name hyperlink.

The Agreement form appears.

- 3** Click the Entitlements view tab.

The Entitlements list appears.

- 4** In the Entitlements list, select an existing entitlement from the current agreement.

Make sure that the Start Date and End Date fields are filled with the appropriate values in the new or existing Entitlement.

- 5** Complete the necessary fields.
- 6** Click the Contacts view tab.
- 7** In the Contacts list, click the menu button, and then click New Record.

The Add Contacts pop-up list appears.

- 8** In the pop-up list, select a contact, and then click OK.

- 9 In the Contacts list, click in the Internet field to activate the Internet flag.

Activating the Internet flag enforces the Entitlement on the Internet Channel, which in this case is Siebel eService.

NOTE: You may also create a new record or new entitlement as needed in the procedure listed above.

Setting Up Email Notification for Siebel eService

Using Siebel Workflow, you can define business rules that will automate your business processes and procedures. For example, you may want to send email notification to alert a customer when the status of an open service request is changed or when a solution has been associated with the service request by a Call Center agent. Another example would be escalating a service request that has been outstanding for longer than one week by sending an email notification to the Call Center manager.

Siebel eService provides four sample Workflow policies that will send email notifications to customers:

- **Siebel eService Activity Policy.** Send email when a new activity is added to a Service Request.
- **Siebel eService Attachment Policy.** Send email when a new file attachment is added to a Service Request.
- **Siebel eService Registration Request Policy.** Send email containing the UserID and Password.
- **Siebel eService Service Request Update Policy.** Send email whenever a Service Request Status gets updated.

These Workflow policies are samples that are shipped with Siebel eService. You may have to modify the Workflow Policy conditions to suit your business model.

NOTE: In addition to performing the procedures below, you must enable Email Manager for these email notifications to work. For information about Email Manager, see *Siebel Business Process Designer Administration Guide*.

To set up email notification

- 1 From the application-level menu, choose View > Site Map > Server Administration > Component Groups.
- 2 Make sure the following component groups are enabled:
 - Communications Management

- Workflow Management

3 Stop and restart your Siebel Server.

Siebel Workflow Manager will now actively monitor your Workflow policies that are online and perform the appropriate actions. The actual sending of the email notification step will be executed by Siebel Communication Manager, which interfaces with your SMTP mail server.

4 From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Policy Group.

5 In the Policies Groups list, select the eService Group record.

The following policies appear in the Policies lists:

- eService Activity Policy
- eService Attachment Policy
- eService Registration Request Policy
- eService Service Request Update Policy

6 In the Policies list, verify that each record contains the following information:

- An Activation field that is blank or contains a value that is not later than the date and time of your testing.
- An Expiration field that is blank or contains a date and time that has not already passed.

7 From the application-level menu, choose View > Site Map > Contacts > All Contacts across Organizations.

8 Find a contact name and type an appropriate address in the Email field (for example, jdoe@yourcompany.com).

9 Click on the Contact record hyperlink, and then click the more/less button in the Contact form.

10 Click the Send Email Updates check box.

Once the component groups have been enabled and you have selected the contacts who will receive email updates, you need to change the parameters that generate triggers for the updates.

To change parameters that generate triggers

- 1 From the application-level menu, choose View > Site Map > Server Administration > Components.
- 2 In the Server Components list, find and select Generate Triggers.
- 3 Click the Component Parameters view tab.
- 4 From the Component Parameters list, change the following parameter values:
 - EXEC to TRUE.
 - SQLFlags to 1.
 - TraceFlags to 1.

After you change the parameters, you need to log into Server Manager and start the task for component Generate Triggers.

To start the task for component Generate Triggers

- 1 From the Command Prompt, log in to Server Manager, using the following structure:

```
srvrmgr /e <enterprise name> /g <gateway server name> /u <database  
user name> /p <db passwd>
```
- 2 Start the task for component Generate Triggers, using the following command:

```
srvrmgr> start task for comp GenTrig with Exec = "TRUE",  
privuser = "<Tableowner_name>", privuserpass = "<Table_password>"
```

NOTE: Substitute the italicized <Tableowner_name> with your database table owner name, and <Table_password> with your database table password.

For more details, see *Siebel Business Process Designer Administration Guide*.

- 3 From Server Manager, type the following:

```
srvrmgr> list task for comp GenTrig
```

NOTE: Wait until the status of the GenTrig becomes completed before returning to the Call Center for the following step.

To change parameter for Workflow Monitor Agent

- 1** From the application-level menu, choose View > Site Map > Server Administration > Components.
- 2** In the Server Components list, find and select Workflow Monitor Agent.
- 3** Click the Component Parameters view tab.
- 4** From the Component Parameters list, change the following parameter values:
 - ActionInterval to 1.
 - Group Name to eService Group.
 - Actionagent to FALSE.
 - SQLFlags to 1.
 - TraceFlags to 1.

After you change the parameters, you need to log into Server Manager and start the task for component Workflow Monitor Agent.

To start the task for component Workflow Monitor Agent

- 1** From the Command Prompt, log in to Server Manager, using the following structure:

```
srvrmgr /e <enterprise name> /g <gateway server name> /u <database  
user name> /p <db passwd>
```
- 2** Start the task for component Workflow Monitor Agent, using the following command:

```
srvrmgr> start task for comp WorkMon with tableownpass='db2'
```

NOTE: The above example is for DB2UDB database. For Oracle, use `tableownpass='<the table owner's name>'`. For MS Sql, use `tableownpass='MSSQL'`.

- 3** From Server Manager, type the following:

```
srvrmgr> list task for comp WorkMon
```

- 4** Log out of Server Manager and return to Siebel Call Center.

Setting Up the Knowledge Base for Siebel eService

Siebel eService provides an integrated, searchable knowledge base through its solution literature and eSmartScript repository. Customer care representatives can use this knowledge base to provide consistent data and answers to customer questions. Customers can access the same answers themselves through Siebel eService.

Organizations can use Siebel eService to build a flexible knowledge base that consists of database records and files both inside and outside the Siebel eBusiness Application. Knowledge items such as solutions to problems, downloads, literature, and general documents can be searched using full-text searching. Customers can browse through a hierarchical library of categorized FAQs and eSmartScripts, or obtain answers using Siebel Smart Answer.

Setting Up FAQs for Siebel eService

To set up FAQs:

- Create the eService Catalog
- Set Up FAQs

Creating the eService Catalog

Siebel eService organizes the knowledge base through a catalog structure, which includes one or more categories. Before configuring FAQs or other solutions, you must define at least one catalog (named eService) and its associated categories. This catalog and associated categories will represent the structure in which your knowledge is organized, both internally and externally, for the customer.

For more information about creating catalogs and categories, including information about fields in the Catalog and Category records, see *Siebel eSales Administration Guide*.

To create the eService catalog and categories

- 1** From the application-level menu, choose View > Site Map > Catalog Administration > Catalog Administration.
- 2** In the Catalogs list, click New.

- 3 Fill in the fields in the Catalog record and the More Info form. Be sure to enter the name *eService* in the Name field.
- 4 Click the name of the catalog, which is a hyperlink.
The Categories list for the catalog appears.
- 5 In the Categories list, add a new record for each of the categories of FAQs that you want displayed to customers using Siebel eService, and fill in the information for each.

Setting Up FAQs

To publish FAQs (that is, Siebel Solutions records) in Siebel eService, you must first create the FAQs and then categorize them in the appropriate Siebel eService catalogs. Once categorized, the FAQs will be rendered in the appropriate applets and views. Optionally, you can apply access control on the categorized FAQs to restrict accessibility of certain categories.

To create an FAQ

- 1 From the application-level menu, choose View > Site Map > Solution Administration > Solutions.
- 2 In the Solutions list, click New.
- 3 Complete the necessary fields. Some fields are described in the following table.

Field	Description
Name	This title name will not be displayed but is merely for administration upkeep.
FAQ	In this field enter the FAQ question to be displayed to the end user.
Description	Enter the FAQ answer. There is a text limit of 2 KB in this field.
Type	Select Solution from this drop-down list to designate the record as an FAQ/Solution record.

To add FAQs to a Siebel eService category

- 1** From the application-level menu, choose View > Site Map > Catalog Administration > Catalog Administration.
- 2** In the Catalogs list, find and click the hyperlink for eService Catalog.
The categories within the Siebel eService Catalog appear.
- 3** From the Categories list, select the category to which you want to add FAQs.
- 4** Click the Solutions view tab.
Any FAQs already associated with the selected category appear.
- 5** In the Solutions list, click New.
The Add Solutions dialog box appears.
- 6** Query and select the desired FAQs, and then click OK.
The selected FAQs are now associated with the selected category.

Notes About Setting Up FAQs

- You may also create a new FAQ record if needed for the procedure above.
- The general FAQs in Siebel eService must be categorized under the catalog named eService Catalog. FAQs categorized there will be rendered in the appropriate Siebel eService applets and views.
- The top FAQs in Siebel eService must be categorized under the catalog named eService Top Solutions and the category named eService Top Solutions. FAQs categorized under this catalog and category will be rendered in the appropriate Siebel eService applets and views. They are viewable under the Top FAQs list on the Siebel eService home page and the first drilldown view of the Browse the Knowledge Base link.

For further details on Catalog and Category administration, see *Siebel eSales Administration Guide*.

Setting Up Siebel eSmartScripts for Siebel eService

Siebel eSmartScript allows customers to engage in self-directed question-and-answer sessions that simulate the experience of talking with an expert. The sessions can have a predefined process flow, or the flow can be designed to change dynamically to reflect a customer's response. The process flow can also populate the Siebel database with customer input, creating service requests and completing applications.

Siebel eSmartScript is integrated with Siebel SmartScript, allowing the same troubleshooting scripts to be shared between the Siebel eService site and customer care representatives who use Siebel Call Center. Scripts can be created and administered using a drag-and-drop, flowchart-based design interface. Benefits include increased call quality, fewer data entry errors, and reduced training time.

For information on creating and working with eSmartScripts, see *Siebel SmartScript Administration Guide*.

NOTE: Siebel eSmartScripts are rendered to end users as Troubleshooting Guides, accessible through the Troubleshoot Problems hyperlink on the Siebel eService home page or Instructions, accessible through the View Instructions hyperlink, also on the Siebel eService home page.

To add eSmartScripts to a Siebel eService category

- 1 From the application-level menu, choose View > Site Map > Catalog Administration > Catalog Administration.
- 2 In the Catalogs list, find and click the hyperlink for eService Catalog.
- 3 In the Categories list, select the category to which you want to add eSmartScripts.
- 4 Click the Troubleshooting/Access Instructions view tab.
- 5 In the Troubleshooting/Access Instructions list, click the menu button, and then click New Record.

The Pick SmartScript dialog box appears.

- 6 Query and select the desired record, and then click OK.

The selected eSmartScripts are now associated with the selected category.

Notes About Siebel eSmartScripts

- The general eSmartScripts in Siebel eService must be categorized under the catalog named eService Catalog. Siebel eSmartScripts categorized under this catalog's categories will be rendered in the appropriate Siebel eService applets and views.
- Make sure that the eSmartScript you select is marked as Active. This can be done by making sure that the Active column contains a check mark.
- The top eSmartScripts in Siebel eService must be categorized under the catalog named eService Top Solutions and the category named eService Top Solutions. Siebel eSmartScripts categorized under this catalog and category will be rendered in the appropriate Siebel eService applets and views. They are viewable under the first drilldown view of the Troubleshoot Problems and the View Instructions links.

Setting Up Siebel Smart Answer for Siebel eService

Siebel Smart Answer uses linguistic analysis techniques and content analysis algorithms to perform natural language searches to retrieve solution data. The system has multichannel self-learning capabilities, so it learns from successful interactions through the Web, email, or the Call Center.

If you plan on using Smart Answer, you should consider the following:

- Smart Answer searches and displays any type of Siebel knowledge base content such as solutions, literature, and resolution document records. The knowledge base used with Smart Answer should have all the appropriate types of knowledge base records associated with the available categories.
- Training of the Knowledge Base can be done using existing email messages and using FAQs converted into a CSV file.
- Be sure to check SupportWeb for other recommendations to refine accuracy for Siebel Smart Answer.

For information on implementing Siebel Smart Answer, see *Siebel Smart Answer Administration Guide*.

Setting Up Downloads, Documentation, and Product Literature

Siebel eService provides customers with access to all product documentation, product literature, and software downloads and updates (collectively referred to as *Siebel literature*). The literature can be provided in a variety of formats, including HTML, PDF, executable files, and dynamic link library files.

Customers who have registered their products can immediately access all the literature for their products without having to perform a search. From the eService portal, customers can select My Account > My Products and see a list of all the products that they have registered. When customers click a product name, a list of all the literature linked to that product is immediately displayed.

Types of Literature

The literature displayed is organized by type. There are three types of literature:

- **Downloads.** For example, software patches and maintenance releases.
- **Documentation.** For example, product manuals.
- **Product Literature.** For example, white papers and data sheets.

Users can perform searches within each type of literature. For example, the customer can search through the list of software patches using a variety of criteria.

Customers can also access literature for products they have not registered. If anonymous users are allowed access to the system, they can also access literature. The Self Service section of the eService portal has links for each literature type. The customer clicks the link for the literature type, and can then use a search feature to locate a literature item or select from the list that is displayed of the most popular literature items of that given type.

Making Literature Available to Customers

To make literature available to customers through Siebel eService, you must perform the following tasks:

- Add the desired item of literature to the literature catalog. You can specify a path, browse for a file, or link to the file through a URL.
- Provide a name for the literature item.
- Specify the type of literature that has been added (documentation, download, or product literature).
- Associate the literature item with either a product or a catalog category. Failure to establish at least one association prevents eService customers from accessing the item. (For further details on Catalog and Category Administration, see *Siebel eSales Administration Guide*.)

To add Literature Items to Siebel eService

- 1 From the application-level menu, choose View > Site Map > Document Administration > Literature.
- 2 From the Literature form, click New. A blank line is added in the list.
- 3 Complete the necessary fields. Some fields are described in the following table.

Field	Description
Name	The title of the literature item. This name is displayed to the customer in Siebel eService.
File Name	Clicking in this field displays a select button. Click select and the Add Attachment window appears. You can type the full path of the file or click the browse button to navigate to the file and select it. Alternatively, if the file is available on a Web server, you can select the file by specifying its URL in the URL field.
Description	Information about the literature.
Literature Type	Clicking this field provides a drop-down list. This list contains other values that are not used in literature administration. You must select one of the three literature types: documentation, product literature, or downloads. Do not select any of the other literature types from the drop-down list. They are used by other Siebel applications.

Once you have added the literature item, the item should be associated with a product or a category of the eService Category Catalog.

To associate literature with a product

- 1** Make sure that the item of literature is selected in the list in the Literature list applet.
- 2** Select the More Info tab if it is not already selected.
- 3** Click the select button in the Products field.
The Associated Products window appears.
- 4** Click New. A list of products appears.
- 5** Query and select one or more products to associate with the literature item.

If desired, you can also associate literature with a Siebel catalog category. (For more information on Catalogs and Categories, see *Siebel eSales Administration Guide*.)

To associate literature with a catalog category

- 1** Select the literature item from the list in the Literature form.
- 2** Click the Category tab below the literature applet. If the literature is already associated with any catalog categories, the categories are displayed in the list.
- 3** Click New.
The Add Subcategories window appears.
- 4** Query for any of the eService Catalog Categories.

NOTE: Siebel eService is preconfigured to display items only in the eService Catalog categories.

Administering Web Access for Siebel eService

Web access administration allows Call Center agents to register usernames and passwords and to assign responsibilities and user types to contacts. For more information about contact administration, see *Siebel eSales Administration Guide*. Responsibilities determine what views a user is allowed to access. Additionally, the Web Access form allows agents to manage a contact's Web access challenge question and answer.

NOTE: Because the Web Access Administration view is used by Call Center agents, rather than Call Center administrators, the number and scope of available responsibilities that can be assigned is limited. The administrator can indicate which responsibility records should be available by setting the responsibility's Web Access property to Yes in the Responsibility Administration view. For more information on this view, see *Applications Administration Guide*. Only responsibilities with this property are available for agents to assign to contacts through Web Access Administration.

To assign user types and responsibility

- 1** From the application-level menu, choose View > Site Map > Contacts.
- 2** Choose the appropriate type of contacts from the list of contacts.
- 3** From the Contacts form, query and select the desired contact.
- 4** Select the Web Access tab.
- 5** Complete the necessary fields, which are described in the following table.

Field	Description
Responsibility	Select this field and click the select button. The responsibility window appears. Query and select the desired responsibilities for this contact.
User Type	Select the desired user type from the drop-down list.

Registering Users and Managing Passwords

When users perform self registration, they can select a user ID, a password, and a *challenge question*. The purpose of the challenge question is to confirm their identity in case a password is forgotten. Call center agents can also register users through the Web Access form. The administrators can assign the user a specific password, or they can generate a random password that is emailed to the user.

To register a user

- 1** Type the desired user ID in the User ID field.
- 2** If needed, assign the user type and responsibility as described in this section.
- 3** Create a password:
 - a** To create a random password, click the email password button. A password is generated randomly and is emailed to the user without being seen by the administrator.
 - b** To assign a specific password, type it in the password field and type the same password in the confirm password field.
- 4** In the challenge question field, type a question that only the user is likely to be able to answer.
- 5** In the answer to challenge question field, type the answer to the challenge question.

When users forget their passwords, Call Center agents can use the Web Access form to verify users' identities and reassign a new password. They can assign one manually or have a random one generated and emailed to the user.

To manually enter or generate a new password

- 1** From the Contacts form, query and select the desired contact.
- 2** Select the Web Access tab.

The user's Web access information, including Challenge Question and Answer, is displayed. The user's password is not displayed for security reasons.

- 3** If required, verify the contact's identity by asking the challenge question.

- 4** You can assign a new password manually by entering it into the password fields, or email a randomly generated password by clicking the email password button.

Setting Up Siebel eSearch for Siebel eService

Siebel eSearch allows users to search for knowledge items such as solutions to problems, resolution documents, product news, downloads, documentation, product literature, and general external documents. Users can locate information by using full-text searching. Organizations can build a flexible knowledge base consisting of both database records and files inside the Siebel eBusiness Application or in an external file system.

The same knowledge base is employed across various channels of communication. Call center agents use this knowledge base to answer customer queries over the phone or through email. In addition, by opening up the same knowledge base to Web customers, organizations can allow these customers to receive consistent answers without contacting the Call Center.

Search results are sorted by relevancy. Personalized visibility rules can be applied to each customer who has access to the data and files. For instructions on setting up user access on your Siebel eService site, see *Security Guide for Siebel eBusiness Applications*.

Siebel Advanced Search (a separately licensed module) makes searching more intuitive and effective. Siebel Advanced Search uses fuzzy logic to apply technologies like term proximity, word stemming, advanced thesaurus, term inflection, and automatic spell checking to enhance the ability of users to locate information in the knowledge base.

Siebel eSearch must be set up before any search can be conducted in Siebel eService. For more information, see *Siebel Search Administration Guide*.

Setting Up Contact Us

The Contact Us feature of Siebel eService allows a business to present its customers a variety of communications channels including face-to-face, telephone, email, online chat, Voice over IP, fax, or postal mail. Contact Us makes these channels readily available on one Web site, with a Contact Us link displayed on every Siebel eService view.

Contact Us includes the following functionalities:

- **Branch Locator.** Customers can locate the nearest sales or service locations and driving directions to conduct face-to-face business transactions.
- **Telephone or Fax.** Customers can view a list of telephone and fax numbers to communicate with the people in an organization.
- **Email.** Customers can submit inquiries through the Siebel eService site by filling out a form with required information (to whom the request should be directed, the nature of the inquiry, and so on). The contents of this form are then converted into an email message or routed to an email address in your existing email system.
- **eCollaboration.** Customers can submit requests to initiate a live Web-based collaboration session with a customer care representative using the regular telephone line, Voice over IP, or text chat technology.
- **Mail.** Customers can view a list of the organization's postal addresses if they need to mail letters or packages to the company.

Setting Up Branch Locator

Branch Locator allows customers to identify the stores and branches of an organization that are closest to a specified location, such as their home or work. Users (salespeople, customer care representatives, or Siebel eService users) can perform branch location searches based on a city, state, or ZIP Code query. In the result of the search, branches are displayed in order of proximity, along with relevant information such as location names, addresses, operating hours, telephone numbers, and distance. Customers can click on the Directions button, which will open a new browser displaying a third-party interactive direction or map service such as MapQuest.

To deploy Branch Locator functionality, you:

- Import the geocode data for your region.
- Create searchable branch locations.
- Optionally, link branch results to third-party map services.

Importing Geocode Data

The geocode data acts as a location reference for your region.

You can import Geocode data in one of two ways:

- Using the Import command on your Siebel application-level File menu.
- Using Siebel Enterprise Integration Manager (EIM).

The imported geocode data resides in the database table (S_ZIPCODE). [Table 3](#) shows the six columns within this database table that must be filled with data.

Table 3. Data Model for S_ZIPCODE Table

Column	Description
ZIP Code	Postal ZIP Code in alphanumeric text.
City	Name of city.
State	Name of state or province. This field may be left empty as applicable to certain countries.

Table 3. Data Model for S_ZIPCODE Table

Column	Description
Country	Name of the country.
Latitude	Latitude number (0 to +/- 90; '+' for the Northern Hemisphere and '-' for the Southern Hemisphere).
Longitude	Longitude number (0 to +/- 180; '+' for the Eastern Hemisphere and '-' for the Western Hemisphere).

You can import a maximum of 2,000 geocode data records per invocation Import command on the Siebel Call Center Web client. Make sure that your geocode data is stored in a CSV or tab delimited text file that contains the column heading information shown in [Table 3](#).

NOTE: Siebel Systems makes no guarantees or warranties about the accuracy of the geocode data used by Branch Locator. For the latest and most up-to-date geocode data, consult a geocode data vendor of your choice. The geocode data included in Siebel eService is sourced from www.zipinfo.com with the July 2001 issue of the ZIPLIST5 Geocode™ product.

To import geocode data with the Import command

- 1 From the application-level menu, chose View > Site Map > Application Administration > ZIP Code Administration.
- 2 In the ZIP Geocodes list, click the menu button, and then click Import.
The Import dialog box appears.
- 3 Click Browse to select an Input File.
This entry will be your geocode data file.
- 4 For the Input Format field, select CSV or Tab Delimited text format for your geocode data file.
- 5 Select Auto Mapping as the Input Source.
- 6 Select Overwrite Existing Records and click Next.

- 7 Make sure your Import Fields are matched with Siebel Fields and click Next.

A view log appears when the import process is complete.

You can also import geocode data using Siebel Enterprise Integration Manager (EIM). In its default state, Siebel eService supports the (S_ZIPCODE) data model table with at least the six column fields being filled in with data. See [Table 3 on page 53](#) for data model table descriptions.

To import data with Siebel Enterprise Integration Manager (EIM), see *Siebel Enterprise Integration Manager Administration Guide*.

Creating Searchable Branch Locations

To create searchable branch locations, you must:

- Create divisions for the branch locations.
- Enter the searchable branch locations for existing divisions.

To create a division for a branch location

- 1 From the application-level menu, chose View > Site Map > Group Administration > Divisions.

The Divisions list appears.

- 2 In the Divisions list, click New.
- 3 Complete the fields as needed.
- 4 Select the appropriate organization or channel partner.

NOTE: For organizations, make sure that the Organization flag is checked. For channel partners, make sure that the Channel Partner flag is checked.

Entering Branch Locations

You can create searchable branch locations manually.

To add new branch locations manually

- 1 From the application-level menu, chose View > Site Map > Application Administration > Branch Locator Administration.

The Branch Locations list appears.

- 2 From the Branch Locations list, click New.

- 3 In the Division field, click the select button.

The Pick a Division dialog box appears.

- 4 Select an existing internal division or channel partner and click OK.

- 5 Complete the remaining fields. The fields are described in the following table.

Field	Description
Branch	The name you want to display to the user in the results view.
Category	The type of category for the branch location.
Division	The Division select button will pull the internal divisions and channel partners created in the previous step.
Address	This field will be populated automatically by the primary address of the division. You can also select an address other than primary.
Longitude	If you do not enter a value, the longitude value for your ZIP Code will be used from the S_ZIPCODE table, based on the ZIP Code you provide in the Address-ZIPCode field.
Latitude	If you do not enter a value, the latitude value for your ZIP Code will be used from the S_ZIPCODE table, based on the ZIP Code you provide in the Address-ZIPCode field.

To make other changes to branch location records

- Edit branch location information in the Branch Location view by selecting the field containing the information you want to edit.
- Delete a branch location by selecting the record you want to delete, clicking the menu button, and then selecting Delete Record.

To create new categories for branch locations

- 1 From the application-level menu, chose View > Site Map > Application Administration > List of Values.
- 2 Click New.
- 3 In the Type field, click the select button.
The Pick Value Type dialog box appears.
- 4 Query for BUSINESS_CATEGORY, and then click OK.
- 5 Complete the following fields as needed.

Field	Description
Type	The name of value type that must match the existing Branch Location Category Type, which is BUSINESS_CATEGORY.
Displayed Value	The name of category value that will be displayed to the end users.
Language Independent Code	The language independent field value that will be used to search for the category. For example, in the Spanish version of Siebel eService, you may see Oficinas de Ventas as the Displayed Value while the Language Independent Code value would still be Sales Offices.

Linking Branch Results to Third-Party Map Services

You can link your Siebel eService Web site to free, third-party, map service providers, such as:

- **MapQuest.** LinkFree is a free service of MapQuest that allows you to link directly to the MapQuest site, allowing your users to view maps for any address they choose. When users click on the Direction link icon on the Branch Locator results view, Mapquest's free direction/map service page is loaded. Users must submit a brief registration form to Mapquest before making the free link available on their Web sites.

NOTE: For legal terms, contact Mapquest.

- **Yahoo!.** You can link to Yahoo!'s Map or Direction service as long as you comply with Yahoo!'s Terms of Service agreement when using its services.

To link branch results to any third-party map service provider, you must change the user property values in the Service Provider Search Engine business service in Siebel Tools. The URL address format and variable values depend on the third-party service providers' URL call. Consult the map providers' latest URL syntax. For information on Siebel Tools, see *Siebel Tools Reference*.

Setting Up Email, Fax, Mail, and Phone Accounts for Siebel eService

Administer email, Mail, and Fax in the Contact Us view, so your customers can contact you through these channels.

Make sure you have enabled the server component group CommMgmt, which will be started together with the Siebel Server process, to process inbound emails. You can verify a successful email submission by opening Siebel Call Center and checking the logged event for this action from the Server Request Screen. For more information, see *Siebel Communications Server Administration Guide*.

You can create multiple email subjects to be displayed for a particular email account by repeating the following steps.

To set up email, fax, mail, and phone accounts

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

The Email, Fax and Mail Accounts list appears.

- 2 In the Email, Fax and Mail Accounts list, click New.
- 3 In the Address field, type the account address.
- 4 From the Account Type drop-down list, select Contact Us.

- 5** In the Address field, click the select button.

The Account Addresses dialog box displays.

NOTE: Only the primary address will be displayed. If additional addresses need to be displayed, you must create additional Contact Us accounts. Each address must have its own primary address.

- 6** To use an existing address, select an address in the Account Addresses dialog box and click Close.
- 7** To use a new address, click New, enter address information in the fields, and then click OK.

NOTE: If an email address is entered in the Email field, the name of the Account displays as one of the drop-down To recipient fields in the Contact Us Email View.

- 8** Select that address and click Close.
- 9** Click the Email Subjects view tab and click New to create a new email subject value.
- 10** Complete the necessary fields.

For the Subject field, enter a value you want to display in the Subject drop-down list in the Contact Us Email view.

Notes on Setting Up Email, Fax, Mail, and Phone Accounts

- If you want to create email accounts only, leave the address field blank.
- If you do not enter a street address field value for a Contact Us email, fax, and mail account, that account will not show up in the Mail or Fax list.
- If you do not enter an email address field value for a Contact Us account, the corresponding account will not show up as one of the To email drop-down list entries.

- Make sure that you enter at least one Subject field value for each email account you create.

Activating the Email Password Button

The Email Password button allows eService users to change their email passwords.

This button uses the workflow Contact Password Reset. You must activate this workflow for this button to work. For more information about workflows, see *Siebel Business Process Designer Administration Guide*.

NOTE: In addition to activating the workflow, you must enable your Communications Management Component Group and create the email profile that will be used to send the email, as described previously.

To activate the workflow for the Email Password button

- 1** From the application level menu, choose, View > Site Map > Business Process Administration > Workflow Processes.
- 2** Use a query to find the workflow named Contact Password Reset.
- 3** If the status of this workflow is Inactive, do the following:
 - a** Click Revise.
 - b** When the revise operation is done, click Save.
 - c** In the Workflows list, make sure that a new copy of the process exists with the status In Progress.
 - d** Select this new copy of the process, and click Activate to activate the workflow.
- 4** Restart the server.

Setting Up Siebel eCollaboration for Siebel eService

You can integrate Siebel eCollaboration with your Siebel eService Web site, offering immediate live assistance through the Siebel eService site, ensuring that responses to customer issues are accurate across all communications channels. Siebel eCollaboration allows customers browsing your Siebel eService site to obtain immediate access to live assistance from customer care representatives. Based on the preferred method of communication (a text chat, a call back over the telephone, or even a voice interaction over the Internet), customer requests are queued and routed to the appropriate agents along with real-time customer profile information. The agents can take customers on Web tours, jointly fill out forms, do product demonstrations, take control of customers' desktops, and troubleshoot customers' problems.

For specific instructions on setting up and configuring Siebel eCollaboration, see *Siebel eCollaboration Administration Guide*.

Setting Up Siebel Communications Server

Siebel Communications Server processes inbound and outbound communication messages into the Siebel application. Siebel eService uses Communications Server to process the inbound structured email forms submitted by users.

For more information, see *Siebel Communications Server Administration Guide*.

Setting Up Asset Management

Siebel Asset Management allows users to register their newly purchased products, access warranty information, and view product news and recommended product services.

To set up asset management, perform the following tasks:

- [“Setting Up Warranties” on page 62](#)
- [“Setting Up Product News” on page 64](#)
- [“Setting Up Recommended Services” on page 66](#)

Setting Up Warranties

To include Product Warranties, you must first create warranties, and then associate those warranties with products. You may or may not choose to associate default warranties with products. To work with warranties you must be in the Siebel Call Center client.

Creating Specific Warranties

To create specific warranties, you:

- Set up the warranty.
- Associate the specific warranty with a user asset.

For information about setting up warranties, see *Siebel Field Service Guide*.

To associate specific warranties with user assets

- 1** From the application-level menu, choose View > Site Map > Assets > All Assets Across Organizations.
- 2** In the Assets list, select the user asset you would like to link to a warranty.

NOTE: You may need to query on the asset name or serial number.

- 3** Click the Warranty view tab and Click New.

- 4 In the Name field, click the select button.
The Pick Warranties dialog box appears.
- 5 In the Pick Warranties dialog box, select a warranty and click OK.
- 6 Enter or edit the Start Date and End Date field values if needed.

NOTE: When you select a warranty, the Start Date and End Date fields will automatically populate if the warranty has a Start Date Type field value and the asset has a Purchase, Ship, Registered, or Install Date value.

Creating Default Warranties

To create a default warranty, you:

- Set up the default warranty
- Associate products with the default warranty

To set up a default warranty

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

The Warranties screen appears.

- 2 In the Warranties list, click New.
- 3 Complete the necessary fields. Some fields are described in the following table.

Field	Comments
Type	Use this drop-down list to choose what you want to associate your product with. Choose Product to associate your warranty to a product.
Start Date Type	Use this drop-down list to set the time at which your product warranty will go into effect. Siebel eService will automatically associate a warranty to a product if the Start Date Type = Purchase Date. Selecting Purchase Date will make sure that your warranty will take effect on the date the product is purchased.

Field	Comments
Duration (Days)	This is the number of days the warranty will be in effect.
Provider	This select button invokes a dialog box from which you may choose a warranty provider.

Once the following steps are completed, Siebel eService users will be able to view the default warranties associated with their newly registered products in their registered product detail view.

To associate products with a default warranty

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

2 In the Warranties list, select your new default warranty.

3 Click the Products view tab and click New.

The Add Internal Products dialog box appears.

4 Select the product to be associated with the selected warranty and click OK.

The products are associated with the default warranty.

NOTE: To add more than one product, press CTRL while selecting the products in the Add Internal Products dialog box.

Setting Up Product News

To allow users to view news about their registered products:

- Publish product news
- Link product news to products

To publish product news

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

The Solutions list appears.

- 2 In the Solutions list, click New.
- 3 Complete the fields as needed. Some fields are described in the following table.

Field	Comments
Name	The value entered into this field will not be displayed to the user. This value is used only to facilitate administrative upkeep.
Description	This field has a 2 KB text limit.
Type	Select Product News from the drop-down list to classify the solution as a product news record.
Status	Select the value which reflects the status of your record.
Publish Internal, Publish External	These two check boxes allow you to designate the record for viewing internally, (that is, within your organization), externally, (that is, publicly on your Siebel eService Web site), or both internally and externally.

When you link a Product News record to a product, customers who have registered the product can view the product news record in Siebel eService.

To associate product news with products

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

The Products list appears.

- 2 In the Products list, select the product to be linked with product news.
- 3 In the More Info view tab, select Product News from the Show drop-down list.
- 4 In the Product News list, click New.

The Pick Product News dialog box appears.

- 5 Select a product news record to link to the product and click OK.

Setting Up Recommended Services

To allow Siebel eService users to view newly added recommended services linked to their registered products, or assets, in Siebel eService:

- **Create a recommended service.** The recommended service is created in the product administration view. Technically, it is another product that you are trying to sell to customers who have already bought products.
- **Link the recommended service with products.** After you link the recommended service to a product, customers who have registered the product can view the recommended service in Siebel eService.

To create a recommended service product

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

The Products list appears.

- 2 In the Products list, click New.
- 3 In the More Info view, complete the necessary fields, including the Product and Description fields.

A sample Product could be 1-Year Service Maintenance, and a sample Description could be Install latest software upgrade.

To link recommended services with products

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

The Product list appears.

- 2 In the Product list, find and select the product to be linked with a recommended service product.
- 3 In the More Info view, click the menu button and select Related Products.

- 4** In the Related Products view, click New.

The Add Internal Products dialog window appears.

- 5** From the Add Internal Products dialog window, select a Recommended Service product and close the window.
- 6** In the Relation field, select Recommended Service.
- 7** In the Product screen, click Save.

Administering Customer Satisfaction Surveys

The Siebel eService Customer Satisfaction survey allows you to obtain customer feedback. The survey is a Web-based form linked to Web pages in which a customer has closed a service request. The customer can fill out the form, submit it, and your company can analyze the results.

You can modify the list of selectable responses for each survey question in the Siebel Call Center client. For instructions on how to configure control properties of the Customer Satisfaction Survey, see [“Setting Up Customer Satisfaction Surveys” on page 24](#).

To administer a customer satisfaction survey

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

2 Click Query.

3 Type cs_* in the Type field and click Go.

A list of customer satisfaction values appears.

4 Modify the existing values in the fields as needed. Some fields are described in the following table.

Field	Comments
Displayed Value	The answer that will appear in the drop-down list of values.
Order	The order in which the answer will appear in the drop-down list of values. Enter 1 if you want the value to appear first on the list, and so on.
Active	This field must be checked for the record to be active.

Personalizing Siebel eService

Using Siebel Personalization, you can create personalization rules and apply them to applets and views so that each individual can view personalized content through these applets and views.

For example, you can create personalized text messages to alert users to update their user profiles or remind them to review their current open service requests. Once users update their user profiles and review the service requests, the personalized messages disappear automatically. In essence, the personalization rules can evaluate each user's navigational clicks and can render the appropriate text messages and guide them through the site.

For more information on setting up and implementing Siebel Personalization, see *Personalization Administration Guide*.

Setting Up Siebel Self-Service Wireless

Siebel Self-Service Wireless extends the functionality of Siebel eService. It allows customers to use browser-enabled wireless devices to receive the same self-service benefits available with Siebel eService. Combined with Siebel Wireless Messaging, Siebel Self-Service Wireless allows organizations to send customers real-time service alerts using a variety of means, including SMS, TAP, Email, FLEX, and other text messages.

Siebel Self-Service Wireless is consistent with other Siebel applications. It uses the same set of business objects, the same development toolset, and the same logical data model to operate on browser-enabled wireless devices.

For more information on Siebel Self-Service Wireless, including setup and administration in your enterprise system, see *Siebel Wireless Administration Guide*.

Index

Symbols

.SWT files. *See* template files
> customizing Web site
elements, list of 22

Numerics

7.0, upgrading to 20

A

access control, table of mechanisms and
example 30
administrator
administration tasks described 27
deployment tasks, about 17
security framework, list of tasks
performed by 29
Applet Web Template, eService Web site
element 23
asset management, setting up
default warranties, setting up 62
portal page, about using 11
product news, associating with
products 65, 66
product news, publishing 65
specific warranties, associating with user
assets 63
attachments, setting up auto creation 25
authentication, about controlling
access 29

B

Branch Locator, Contact Us functionality
described 52
Branch Locator, setting up

about and deploying steps 53
geocode data, data model (table) 53
geocode data, vendor Web site 53
geocode, about importing through
Enterprise Integration Manager 55
geocode, importing with the Import
command 54, 55
new branch locations, manually
adding 56
new categories, creating for branch
locations 57
records, editing/deleting 56
searchable branch locations, creating 55
third-party map services, linking to 58

C

Call Center Agents, using eService
perspective 13
cascading style sheets, eService Web site
element 23
communication channels. *See* Contact Us
configuration
customizing Web site, typical steps 22
eService, modifying 17
Contact Us
about and functionalities 52
Branch Locator, setting up 53, 58
eCollaboration, about integrating with
eService 61
eMail, fax, mail, and phone accounts,
notes (about setting up) 59, 60
eMail, fax, mail, and phone accounts,
setting up 58
control object definition, about 23

customer care representative, list of user
administration tasks performed by 29
customer perspective, about components of
Web Service Portal 11
Customer Satisfaction survey. *See* eService
Customer Satisfaction survey
Customer Survey applet, configuring control
properties 24
customizing Web site
configuring, typical steps 22
elements, list of 23

D

data privacy, about 31
database server, about supported
platforms 15
deployment
administration tasks, about 17
configuring, modifying eService 17
Web site, about launching tasks 17

E

eCollaboration 52
eService, about integrating with 61
EIM. *See* Enterprise Integration Manager
eMail
See also eMail notification
accounts notes, about setting up 59, 60
accounts, setting up 58
Email Contact Us functionality
described 52
eMail notification
See also eMail
sample Workflow policies 35
setting up 35, 36
encryption technology, about using for data
privacy 31
Enterprise Integration Manager, about
importing geocode data through 55
entitlements, setting up
about and verification process 32

contact, about responsibility to add
to 32
entitlement verification, enabling/
disabling 32, 33
eService Customer Satisfaction survey
Customer Survey applet, configuring
control properties 24
types of surveys and accessing 24
eService Web site
customizing, typical configuration
steps 22
eCollaboration, about integrating with
eService 61
elements, list of 22, 23
launching, about and tasks 17

F

FAQs
creating an FAQ 41
notes, about creating and
categorizing 42
fax accounts
notes (about setting up) 59, 60
setting up 58
Fax Contact Us functionality described 52

G

geocode data
data model (table) 53
Enterprise Integration Manager, about
importing through 55
Import command, using to import 54,
55
vendor Web site 53
Give Us Your Feedback link survey
about and accessing 24

I

installation, list of components 15
Internet SSL, about using for data
privacy 31

K

- knowledge base
 - about 40
 - eSmartScripts, about and categorizing 43
 - FAQs, creating 41
 - FAQs, notes about creating and categorizing 42
 - portal page, about using to search 11
 - Siebel Smart Answer, about and considerations 44

L

- log in process described 9

M

- Mail Contact Us functionality described 52
- MapQuest, linking branch results to 58
- My Account, about and screen example 10

O

- object definitions, about control object definitions 23
- order tracking, about and using portal page 11

P

- passwords, process of external authentication and eService 30
- personalization, about using and example 69
- phone accounts
 - notes (about setting up) 59, 60
 - setting up 58
- portal page, overview 9, 10
- product news
 - products, associating with 65, 66
 - publishing 65
- Product Warranties. *See* warranties
- public access, about security framework and process 16

R

- Recommended Products, about and screen example 9
- registered users
 - See also* users
 - authentication, about using to control access 29
 - security framework, about and process 16
- repository, about upgrading to 7.0 20

S

- salutation, portal page element described 9
- search, about searching knowledge base 51
- security framework
 - parts described 29, 31
 - public access vs registered users, about and process 16
- Self Service, portal page element described 10
- service entitlement. *See* entitlements, setting up
- service request management, about and using portal page 11
- Service Request survey, about and accessing 24
- service requests
 - See also* entitlements, setting up
 - attachments, setting up auto creation 25
- Siebel 1
- Siebel administrator, list of user administration tasks performed by 29
- Siebel Advanced Search about 51
- Siebel Application Upgrader, about using to upgrade repository 20
- Siebel Call Center Web client, maximum number of geocode data records imported 54
- Siebel eCollaboration
 - eService, about integrating with 61

Siebel Enterprise Integration Manager,
about importing geocode data
through 55
Siebel Enterprise Server, about
supported 15
Siebel eSearch, about using to search
knowledge base 51
Siebel eService Customer Satisfaction
survey, administering 68
Siebel eSmartScripts
about and categorizing for knowledge
base 43
Siebel Personalization, about using and
example 69
Siebel Self-Service Wireless, about using
with eService 69
Siebel Smart Answer, about and
considerations 44
Siebel SmartScript. *See* Siebel eSmartScripts
Siebel Wireless Messaging, about using to
send service alerts 69
Smart Answer, about and
considerations 44
style sheets, about cascading style
sheets 23

T

Telephone Contact Us functionality
described 52
templates
7.0, about upgrading to 20
modifying 17
Troubleshooting Guides. *See* Siebel
eSmartScripts

U

upgrading to 7.0, steps 20
user assets, associating with specific
warranties 63

users
access, control mechanisms (table) 30
authentication, about using to control
access 29
IDs, process of external authentication
and eService 30
public access vs. registered users, about
and process 16

V

View Web Template, eService Web site
element 23

W

warranties
default warranties, setting up 62
specific warranties, associating with user
assets 63
Web Delegated Customer Administrator
note, about adding contact to
entitlement 32
responsibilities, about 30
Web Page Web Template, eService Web site
element 23
Web Servers, about supported 15
Web site, eService
customizing, typical configuration
steps 22
eCollaboration, about integrating with
eService 61
elements, list of 22, 23
launching, about and tasks 17
Web templates, upgrading to 7.0 20
wireless devices, about using with
eService 69

Y

Yahoo, linking branch results to 58