Copyright © 2005, 2006, Oracle. All rights reserved.

The Programs (which include both the software and documentation) contain proprietary information; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent, and other intellectual and industrial property laws. Reverse engineering, disassembly, or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. This document is not warranted to be error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose.

PRODUCT MODULES AND OPTIONS. This guide contains descriptions of modules that are optional and for which you may not have purchased a license. Siebel's Sample Database also includes data related to these optional modules. As a result, your software implementation may differ from descriptions in this guide. To find out more about the modules your organization has purchased, see your corporate purchasing agent or your Siebel sales representative.

If the Programs are delivered to the United States Government or anyone licensing or using the Programs on behalf of the United States Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS. Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the Programs, including documentation and technical data, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement, and, to the extent applicable, the additional rights set forth in FAR 52.227-19, Commercial Computer Software--Restricted Rights (June 1987). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

The Programs are not intended for use in any nuclear, aviation, mass transit, medical, or other inherently dangerous applications. It shall be the licensee's responsibility to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of such applications if the Programs are used for such purposes, and we disclaim liability for any damages caused by such use of the Programs.

Oracle, JD Edwards, PeopleSoft, and Siebel are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

The Programs may provide links to Web sites and access to content, products, and services from third parties. Oracle is not responsible for the availability of, or any content provided on, third-party Web sites. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Oracle is not responsible for: (a) the quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Oracle is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.
# Table of Contents

- About Siebel Brightware eService ................................................................. 1
- Product Overview .......................................................................................... 1
- Siebel Brightware eService Professional Services ........................................... 2
  - Overview and Benefits .............................................................................. 2
  - Joint-Success .......................................................................................... 2
- Implementation Readiness ............................................................................ 3
- System Requirements ..................................................................................... 4
- Network Requirements .................................................................................. 6
- Database Administration .............................................................................. 7
- Create Siebel Brightware eService Mailbox ................................................... 7
- Installation/Configuration of the Siebel Brightware eService Software .......... 8
About Siebel Brightware eService

Siebel Brightware eService provides guided selling and service software that maximizes time with customers — assessing needs, configuring complex products and solutions, generating proposals — along with powerful eCustomer service — to turn opportunities into lifetime customers.

Siebel Brightware eService's award-winning and patented Brightware software helps companies dramatically increase their eService levels and sales revenues by ensuring all online interaction channels (email, online chat, web self-service) translate into exceptional customer satisfaction and retention, while reducing costs. Brightware software leverages proven automation technology to deliver unparalleled ROI and an exceptional eCustomer experience.

The Brightware Suite consists of three, tightly integrated multi-channel communications applications: automated email, self-servicing Web pages, and instant messaging. All three applications are managed through a completely integrated Contact Center and response library database. Driven by intelligence engines and automation technologies, Siebel Brightware products preserve the quality of customer service operations by allowing companies to replicate best practices across a variety of issues, and replicate knowledge across multiple channels. With Siebel Brightware products handling routine and mundane inquiries automatically, your CSR staff is available to concentrate on more interesting challenges, increasing overall job satisfaction and decreasing turnover.

Siebel Brightware eService's software suite helps companies cost-effectively handle today's Internet customers with advanced technology that spans both website routing and customer contact channel management.

Product Overview

Siebel Brightware eService is the first in the industry to deliver its collaborative Siebel Brightware application on a non-proprietary Java-based business platform and to apply J2EE standards. Powered by BEA WebLogic, Siebel Brightware eService's Brightware business platform delivers peerless support of high-volume, high-performance interactions. Open, internet-centric technology keeps Siebel Brightware customers ahead of the curve, eliminating the need for constant technology updates and reducing total cost of ownership. Siebel Brightware streamlines the work of developers, administrators, and customer service agents to ensure effective, efficient, and economical business operation.

The Siebel Brightware Contact Center is an intelligent information center that supports Siebel Brightware products to streamline customer communications. Feature-rich, it ensures that your customer service agents and supervisors have the end-to-end information they need to deliver superior and consistent customer interactions throughout the sales and service cycle to foster customer satisfaction and loyalty. Contact Center is an intelligent information center that utilizes customer history and information from Web, email, and chat interactions to ensure that service agents have complete and timely information to deliver seamless customer assistance across email and chat channels. Contact Center’s single-click workflow represents intelligent automation to help your service agents work smarter — by combining advanced message understanding, accurate classification, automatic response selection, and a host of productivity tools, Contact Center ensures that agents work at peak performance.

To cover e-mail interactions, Contact Center communicates with various email servers, routing and responding to electronic inquiries. When Contact Center is fully implemented, it uses a rules-based knowledge repository defined with an internal set of editors or "Managers", to identify emails, process them, and send appropriate action. If Contact Center cannot determine the intent
of a request with a specific percentage of certainty, the request is routed to the Service/Default queue and then waits for an “agent” to receive the request and reply.

The Contact Center software package routes electronic inquiries to the most appropriate queues containing customer service representatives or agents with respective expertise. Supervisors and Agents, working together, monitor and respond to messages as they flow into an email system.

Siebel Brightware eService Professional Services

Siebel Brightware eService Professional Services provides education, consulting, and technical support services for our enterprise customers worldwide. We offer a range of packages and services focused on delivering business value through proven technical and application expertise, focused methodologies, industry domain experience, and commitment to customer success.

Overview and Benefits

Siebel Brightware eService Professional Services utilizes a unique automation design and implementation methodology to facilitate rapid deployment of an automated electronic response system. This approach is focused on practical deliverables and knowledge transfer and results in a solution quickly deployed within the customer environment. Siebel Brightware eService Professional Services consultants work jointly with customer staff to facilitate knowledge transfer from an organization singly dedicated to developing eService solutions for customers across all industries.

Joint-Success

The Siebel Brightware eService Professional Services Organization brings extensive expertise in developing automated assistance solutions across many client environments. Our customers provide their knowledge of the business requirements, technical knowledge of the system infrastructure, commitment of resources to help implement and then maintain the Siebel Brightware eService solution, and ability to best prioritize the scope of the project across time, resources, and system functionality.
Implementation Readiness

This document serves as a readiness guide and should be used as both a planning tool and a checklist for configuring your system environment in preparation for installing your Siebel Brightware eService software. Before a consultant begins the implementation, the various system requirements and configuration settings outlined in this document must be completed. The tasks identified in this guide, as well as those that will be performed at installation and during the ongoing maintenance of the Siebel Brightware eService system, will require expertise specific to your environment in the areas of System Administration, Web Server Administration, and Database Administration. The appropriate resource(s) for these areas of responsibility will need to be available and/or on-hand during the implementation. Upon completion of the tasks identified in this readiness guide, you should return the completed guide/checklist to Siebel Brightware eService in order to confirm your scheduled implementation. (Email or fax your completed readiness guide/checklist to your Siebel Brightware eService Account Manager).

Note: You should refer to the Installation Guide and Release Notes included on the Siebel Brightware eService software media for more detailed information and instruction on the areas and specific tasks covered in this guide.
System Requirements

For each of the following components please indicate the hardware and software configuration being provided. Please review the Installation Guide, located on the product CD (under \\Docs), for specific requirements on each system component.

**Email Server**

We recommend that you create two additional email accounts to utilize for testing purposes – one to utilize as a sample client, and one to utilize as an inbox for a test business unit.

<table>
<thead>
<tr>
<th>Email Server</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Inbound Email Server Name</td>
<td>ex. mail.company.corp</td>
</tr>
<tr>
<td>Email Account Username</td>
<td>ex. answer*</td>
</tr>
<tr>
<td>Email Account Password</td>
<td></td>
</tr>
<tr>
<td>Outbound Email Server Name</td>
<td>ex. gateway.company.com (may be the same as Inbound)</td>
</tr>
<tr>
<td>Test (Client) Account Username</td>
<td>ex. customer*</td>
</tr>
<tr>
<td>Test (Client) Account Password</td>
<td></td>
</tr>
<tr>
<td>Test (Inbox) Account Username</td>
<td>ex. dev*</td>
</tr>
<tr>
<td>Test (Inbox) Account Password</td>
<td></td>
</tr>
</tbody>
</table>

* You may need to provide the domain and login account as well as the mailbox name in order to be able to access the mailbox contents. For example, this may need to be: `brightware\smith\answer (<domain>\<username>\<mailbox>)`. Verify these parameters by setting up a connection via Outlook Express.

**Contact Center (Transactional) Database Server**

Beyond the recommendations of the Installation Guide, we recommend the following:

**RAM:**
- 1 GB minimum for 3000 messages per day
- 1.5 GB minimum for 5000 messages per day

Siebel Brightware eService 8.x Supports the following database management systems and versions:
- Microsoft SQL Server 2000 (service pack 3)
- Oracle 8i (8.1.7.4) and Oracle 9i (9.2.0.4)

**Actual Specs**

<table>
<thead>
<tr>
<th>Estimated Messages per Day:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>RAM:</td>
<td></td>
</tr>
<tr>
<td>Hard Drive Size:</td>
<td></td>
</tr>
<tr>
<td>--Available Drive Space:</td>
<td></td>
</tr>
<tr>
<td>Processor(s), Speed:</td>
<td></td>
</tr>
</tbody>
</table>
### Reporting (Datamart) Database Server

Beyond the recommendations of the Installation Guide, we recommend the following:

| RAM: | 1 GB minimum for 3000 messages per day | 1.5 GB minimum for 5000 messages per day |

In addition, you can assume that your datamart database will be approximately 1.5 times the size of the transactional database.

Siebel Brightware eService 8.x supports the following database management systems and versions:

- SQL Server 2000 (service pack 3)
- Oracle 8i (8.1.7.4) and Oracle 9i (9.2.0.4)

<table>
<thead>
<tr>
<th align="left">Actual Specs</th>
</tr>
</thead>
<tbody>
<tr>
<td align="left">RAM:</td>
</tr>
<tr>
<td align="left">Hard Drive Size:</td>
</tr>
<tr>
<td align="left">--Available Drive Space:</td>
</tr>
<tr>
<td align="left">Processor(s), Speed:</td>
</tr>
</tbody>
</table>

### Siebel Brightware eService Server

<table>
<thead>
<tr>
<th align="left">Actual Specs</th>
</tr>
</thead>
<tbody>
<tr>
<td align="left">RAM:</td>
</tr>
<tr>
<td align="left">Hard Drive Size:</td>
</tr>
<tr>
<td align="left">--Available Drive Space:</td>
</tr>
<tr>
<td align="left">Processor(s), Speed:</td>
</tr>
</tbody>
</table>

### Agent Desktop and Contact Center Console

We strongly recommend a screen resolution (screen area) of at least 1024x768. Screen resolution may be reviewed and modified by accessing Display properties in the Control Panel (Windows systems only).

+ It is recommended that a separate and dedicated computer be allocated to this component.
Network Requirements

The Siebel Brightware Email Assistance servers are designed to work on a 10Mbps, or faster, Ethernet network. The database, mail, and application server computers should all be connected via a local area network (LAN). While it is recommended that the agent and supervisor desktops also be connected to the database, mail, and application servers via a LAN, it is possible to have these computers communicate remotely via a wide area network (WAN) connection provided adequate bandwidth is available. The LAN and WAN bandwidth requirements are as follows:

- **Local Area Network Environment** – The database, mail and application servers should all be connected via a \textit{MINIMUM 10 mbps} connection. The recommended connectivity for these machines is 100 mbps.

- **Remote/Wide Area Network Environment** – Environments in which supervisors and agents will access the system remotely, i.e. via a WAN connection, they should have enough bandwidth that will not only ensure adequate performance for this application, but also test of other applications don’t have degraded performance.

Describe the network environment that has been enabled for the Siebel Brightware eService system:

<table>
<thead>
<tr>
<th>Connection Between:</th>
<th>Connection speed</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>10 mbps</td>
</tr>
<tr>
<td>Email Server and Application Server</td>
<td></td>
</tr>
<tr>
<td>Application Server and Database Server</td>
<td></td>
</tr>
<tr>
<td>Knowledge Manager Computer(s) and Application Server</td>
<td></td>
</tr>
<tr>
<td>Knowledge Manager Computer(s) and Database Server</td>
<td></td>
</tr>
</tbody>
</table>
Database Administration

Setting up the Customer Profile database is basically a two-step process:

1. Allocating resources and sizing the database
2. Modifying and running the appropriate customer profile script.

Additionally, the database administrator should review the following related items:

- **Database Servers** – Ensure that adequate memory and processing resources are available for the Siebel Brightware eService databases. It is generally recommended that a database server be dedicated to supporting the Siebel Brightware eService application. However, if sufficient memory and processing resources are available, the Siebel Brightware eService database(s) can be installed on a shared database server.

- **Database Backups** – Ensure that a regular and systematic backup process is in place, and verify that you can successfully restore and use backup copies of the database(s). It is recommended that the database backup process be run daily at a minimum. It is also necessary to truncate the transaction log after a successful backup.

- **Database Creation, Configuration, and Tuning** – The following settings should be configured to ensure peak system performance. (Note: If you are installing the Siebel Brightware eService database on a shared database server, verify the recommended settings are appropriate for your particular environment prior to implementing.)

Please review the Installation Guide, located on the product CD (under \Docs), for instructions to create the Siebel Brightware and Datamart databases.

Create Siebel Brightware eService Mailbox

A policy decision needs to be made as to whether an existing corporate inbox or mail account can serve as the gateway for email routing, or if you will need to set up another inbox/account specifically for this purpose. If an existing inbox is to be utilized, a temporary or staging inbox will still need to be created for use in testing the installation prior to the system going into production. *To prevent internal users on your network from accidentally emailing this mailbox, we recommend that you hide the mailbox from the email system's address book.*

- Create a Siebel Brightware eService Mailbox. This mailbox will be used to send and receive all mail from the system. *The address of this account will be used as the default outbound email address for all responses sent from the Siebel Brightware eService system.*

- Identify any additional outbound addresses/domains, which need to be supported and determine the business rule(s) for using each additional outbound address.

- The NT user, or login id, used on the Siebel Brightware eService Server machine is the owner of the new (Siebel Brightware eService) mailbox.

- *The new mailbox's name, password properties are required as part of the configuration. You will also need to know the server name of the email server hosting the mailbox account.* This information has been obtained and will be available for the Siebel Brightware eService consultant during implementation.
Installation/Configuration of the Siebel Brightware eService Software

To be performed jointly between the Siebel Brightware eService consultant and the appropriate customer resource(s) at implementation.

- Operating system administrative privileges (i.e. local machine admin) will be required during the installation of the application server components. Access to an account (username and password) with administrative privileges is available for these servers.
- A list of all Agents and Supervisors, and their Usernames/Login ID’s will be required for the configuration of Agents/Supervisors in the database. This information has been obtained and will be available to the Siebel Brightware eService consultant at implementation time.
- A copy of the company-approved responses to customer messages will be required in order to populate the Response Library. This information has been obtained and will be available to the Siebel Brightware eService consultant at implementation time.
- IIS will be used to host the reports. Internet Information Services has been installed on the Reporting Server.

**Additionally, Oracle's Siebel Brightware eService will request a sampling of typical email messages that are being taken by your appropriate customer service area. It would be beneficial to have this email sample collected as part of your readiness plan.**