



BEA WebLogic Portal™

WebLogic Portlets for Siebel Installation Guide

Copyright

Copyright © 2004 BEA Systems, Inc. All Rights Reserved.

Restricted Rights Legend

This software and documentation is subject to and made available only pursuant to the terms of the BEA Systems License Agreement and may be used or copied only in accordance with the terms of that agreement. It is against the law to copy the software except as specifically allowed in the agreement. This document may not, in whole or in part, be copied, photocopied, reproduced, translated, or reduced to any electronic medium or machine readable form without prior consent, in writing, from BEA Systems, Inc.

Use, duplication or disclosure by the U.S. Government is subject to restrictions set forth in the BEA Systems License Agreement and in subparagraph (c)(1) of the Commercial Computer Software-Restricted Rights Clause at FAR 52.227-19; subparagraph (c)(1)(ii) of the Rights in Technical Data and Computer Software clause at DFARS 252.227-7013, subparagraph (d) of the Commercial Computer Software--Licensing clause at NASA FAR supplement 16-52.227-86; or their equivalent.

Information in this document is subject to change without notice and does not represent a commitment on the part of BEA Systems. THE SOFTWARE AND DOCUMENTATION ARE PROVIDED "AS IS" WITHOUT WARRANTY OF ANY KIND INCLUDING WITHOUT LIMITATION, ANY WARRANTY OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. FURTHER, BEA Systems DOES NOT WARRANT, GUARANTEE, OR MAKE ANY REPRESENTATIONS REGARDING THE USE, OR THE RESULTS OF THE USE, OF THE SOFTWARE OR WRITTEN MATERIAL IN TERMS OF CORRECTNESS, ACCURACY, RELIABILITY, OR OTHERWISE.

Trademarks or Service Marks

BEA, Jolt, Tuxedo, and WebLogic are registered trademarks of BEA Systems, Inc. BEA Builder, BEA Campaign Manager for WebLogic, BEA eLink, BEA Liquid Data for WebLogic, BEA Manager, BEA WebLogic Commerce Server, BEA WebLogic Enterprise, BEA WebLogic Enterprise Platform, BEA WebLogic Express, BEA WebLogic Integration, BEA WebLogic Personalization Server, BEA WebLogic Platform, BEA WebLogic Portal, BEA WebLogic Server, BEA WebLogic Workshop and How Business Becomes E-Business are trademarks of BEA Systems, Inc.

All other trademarks are the property of their respective companies.

Contents

WebLogic Portlets for Siebel Installation Guide

Installation Prerequisites for BEA WebLogic Portlets for Siebel	2
Hardware Requirements	2
Software Requirements	2
Administrator Privileges	2
Licensing and Encryption	2
About 128-Bit Encryption	3
Installing BEA WebLogic Portlets for Siebel	3
Installing BEA WebLogic Portlets for Siebel	3
Graphical-Mode Installation on a Windows System	3
Graphical-Mode Installation on a Unix System	9
Reviewing the Installation	15
Configuring the BEA WebLogic Portal	15
Downloading the Third Party Software	16
Downloading Oracle JDBC Drivers	17
Configuration and Settings for Siebel (on Unix)	17
Configuration and Settings for BEA WebLogic Portlets	18
Setting Up Siebel Portlets Repository	18
Creating Schema and Importing Metadata in MS SQL Server	18
Creating Schema and Importing Metadata in Oracle	19
Configuring the SiebelPortalNet.properties File	20
Registering Java Data Source	20

Activating the License for BEA WebLogic Portlets	22
Uninstalling BEA WebLogic Portlets for Siebel	22
Troubleshooting	22
Installation Verification Tests for BEA WebLogic Portlets for Siebel	23
Instructions	24
Installation Verification	24
Verify Project Templates	24
Verify Sample View Templates	25
Verify Product Documentation	25
Verify SQL Scripts	25
Database Verification	26
Verify Database	26
EIS Administration Verification	27
Verify EIS Administration Portlet Initialization and Authentication	27
Verify EIS Instance Creation	28
Verify EIS Credential Mapping	28
Portlets Verification	29
Verify Authentication	29
Verify the Sales Order Portlet	30
Verify the Shipping Status Portlet	31
Verify the My Accounts Portlet	31

WebLogic Portlets for Siebel Installation Guide

This document explains how to install the BEA WebLogic Portlets for Siebel application.

The BEA WebLogic Portlets for Siebel application integrates BEA WebLogic Portal with the Siebel 7.0.4 system.

This guide contains the following sections:

- [Installation Prerequisites for BEA WebLogic Portlets for Siebel](#)
- [Installing BEA WebLogic Portlets for Siebel](#)
- [Configuring the BEA WebLogic Portal](#)
- [Downloading the Third Party Software](#)
- [Configuration and Settings for Siebel \(on Unix\)](#)
- [Configuration and Settings for BEA WebLogic Portlets](#)
- [Activating the License for BEA WebLogic Portlets](#)
- [Uninstalling BEA WebLogic Portlets for Siebel](#)
- [Troubleshooting](#)
- [Installation Verification Tests for BEA WebLogic Portlets for Siebel](#)

Installation Prerequisites for BEA WebLogic Portlets for Siebel

Hardware Requirements

The server should have the following configuration:

- Pentium 4, 1GHz or higher
- 1GB RAM or more
- 40GB HDD

Software Requirements

The following software must be installed on the server:

- BEA WebLogic Platform 8.1 SP2 or SP3
- Siebel 7.0.4
- One of the following databases should be available:
 - Oracle 8i or higher
 - MS SQL Server 2000 SP2
- One of the following web browsers should be available:
 - Internet Explorer 6 or higher
 - Netscape 7.1 or higher
- Java 2 SDK

Administrator Privileges

You must have BEA WebLogic Platform administrator privileges in order to install and configure the BEA WebLogic Portlets for Siebel application.

Licensing and Encryption

The WebLogic Platform software cannot be used without a valid license. You can purchase licenses for the entire WebLogic Platform product or for individual components. For information about the licenses available for WebLogic Platform, contact your sales representative or visit the BEA corporate Web site at <http://www.bea.com>.

About 128-Bit Encryption

Secure sockets layer (SSL) encryption software is available with two levels of encryption: 56-bit and 128-bit. Licenses for the 128-bit client version of SSL are available in the United States and Canada. With proper authorization, customers outside the United States and Canada may also acquire licenses with 128-bit encryption enabled.

A WebLogic Platform license comes with 56-bit encryption enabled by default. Enabling 128-bit encryption for SSL requires that a 128-bit encryption license be present in the license.bea file of the target BEA Home directory before you install the WebLogic Platform software.

Installing BEA WebLogic Portlets for Siebel

Before you start the BEA WebLogic Portlets for Siebel installation ensure that you are installing BEA WebLogic Portlets for Siebel on a supported platform. See [“Installation Prerequisites for BEA WebLogic Portlets for Siebel” on page 2](#).

Installing BEA WebLogic Portlets for Siebel

BEA WebLogic Portlets for Siebel can be installed on both Unix and Windows operating systems using graphical-mode installation.

Graphical-Mode Installation on a Windows System

To start the installation:

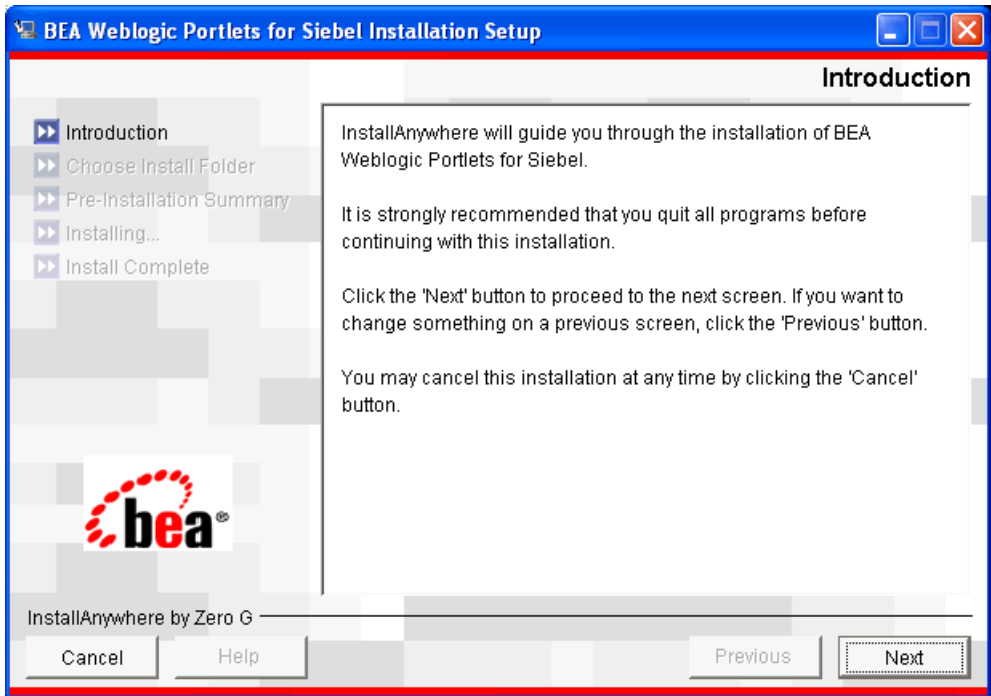
1. Log in to the Windows system.
2. Insert the BEA WebLogic Portlets CD-ROM into the CD-ROM drive.
3. Navigate to the folder and run the installation file `Bea_Siebel.exe`.
4. The program prepares your system for the installation task.

Figure 1 Installation Initialization Screen



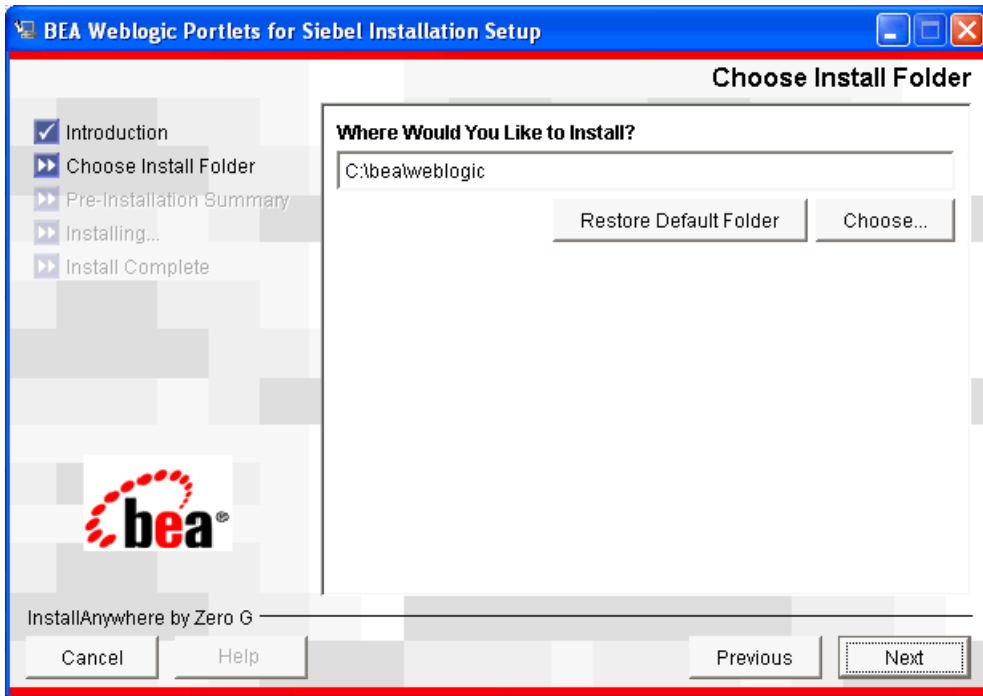
5. The Introduction screen appears. Click Next to continue.

Figure 2 Introduction Screen



6. In the Choose Installation Folder screen, specify the path of the installation directory or click Choose to select the `\bea\weblogic<version>` directory. This is the path where BEA WebLogic Portlets for Siebel will be installed.
7. Click Next to continue.

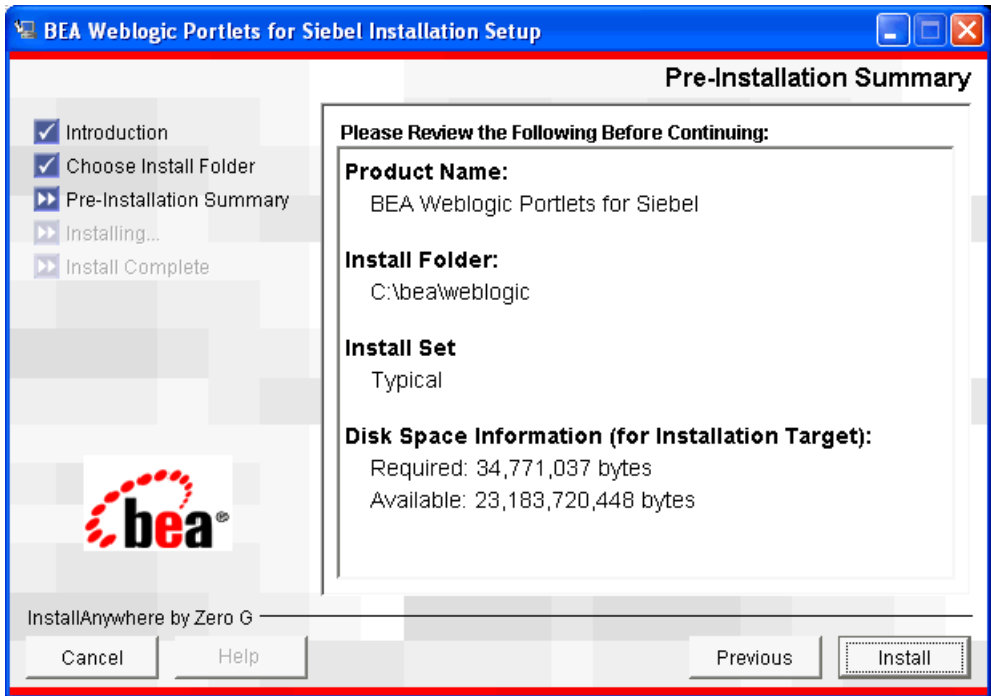
Figure 3 Choose Installation Folder Screen



Note: If a folder other than `\bea\weblogic<version>` is selected then you need to manually copy the templates files from `<selected folder>\workshop\templates` to `\bea\weblogic<version>\workshop\templates`.

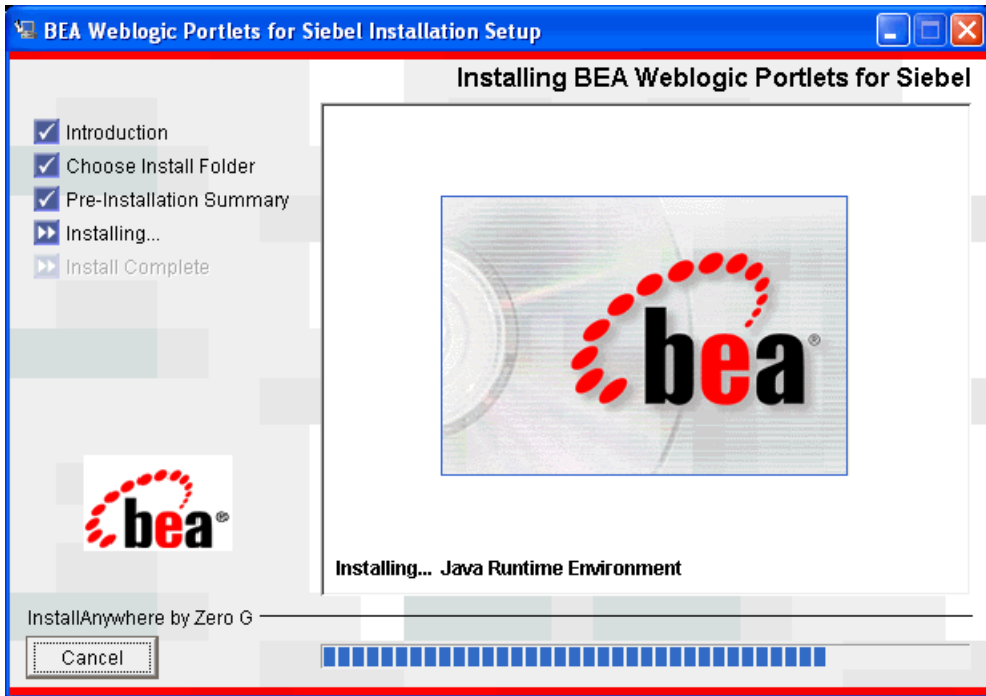
8. The Pre-Installation Summary screen displays your installation preferences. Click Install to continue.

Figure 4 Pre-installation Summary Screen



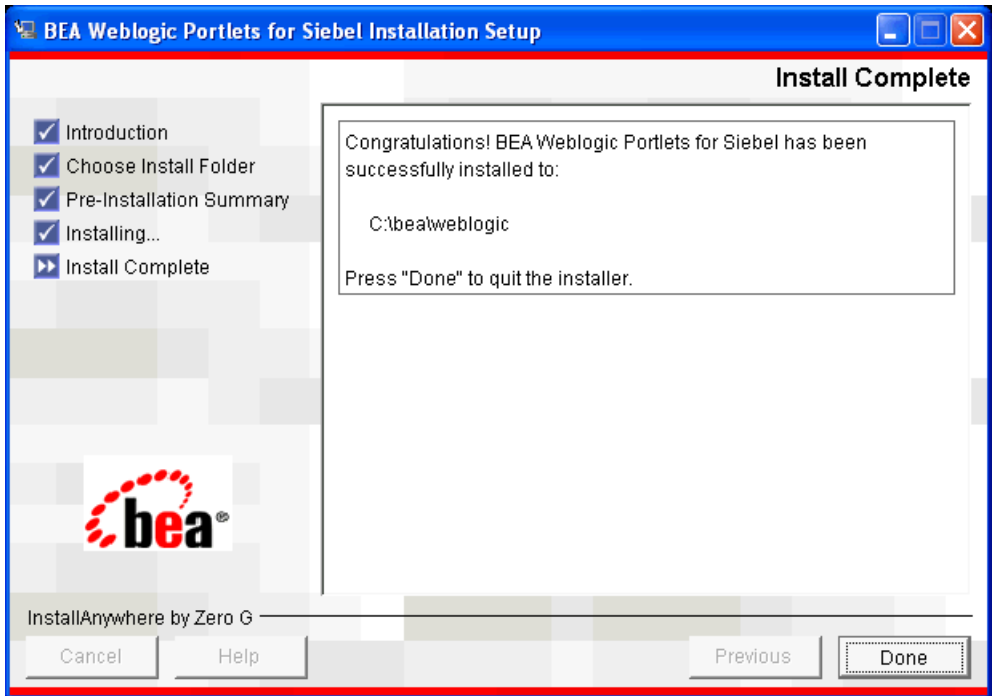
9. The Installing BEA WebLogic Portlets Installation Setup screen displays the progress of the installation.

Figure 5 Installing Screen



10. The Install Complete screen confirms that BEA WebLogic Portlets for Siebel was installed successfully. Click Done to complete the installation.

Figure 6 Install Complete Screen



Graphical-Mode Installation on a Unix System

To start the installation on Unix system:

1. Log in to the Unix system.
2. Mount the BEA WebLogic Portlets CD-ROM into the CD-ROM drive.
3. Open a command-line shell.
4. Go to the CD-ROM directory and navigate to the folder for the installation program `install.bin`.
5. Invoke the procedure by entering the following command:

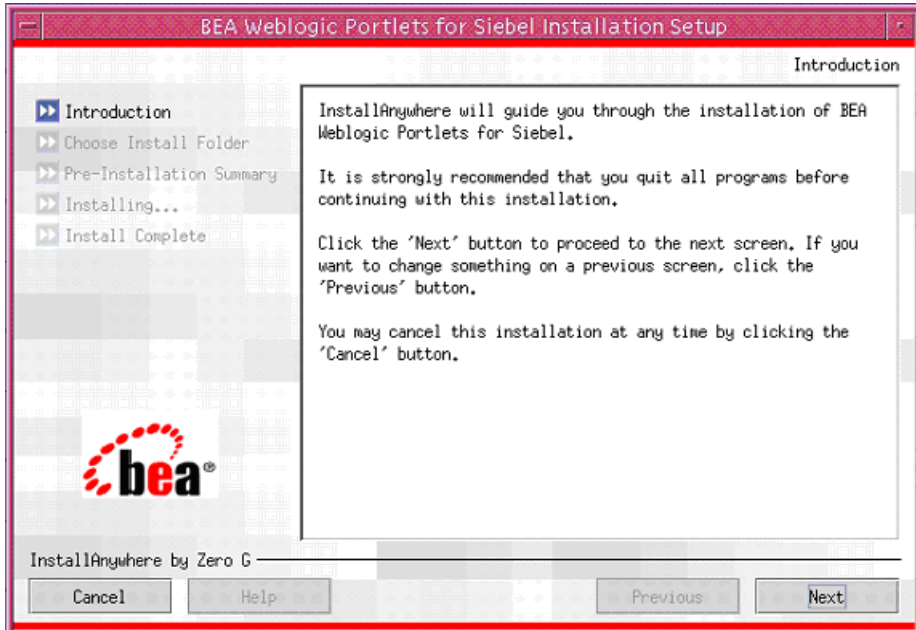

```
./install.bin
```
6. The program prepares your system for the installation task.

Figure 7 Installation Initialization Screen



7. The Introduction screen appears. Click Next to continue.

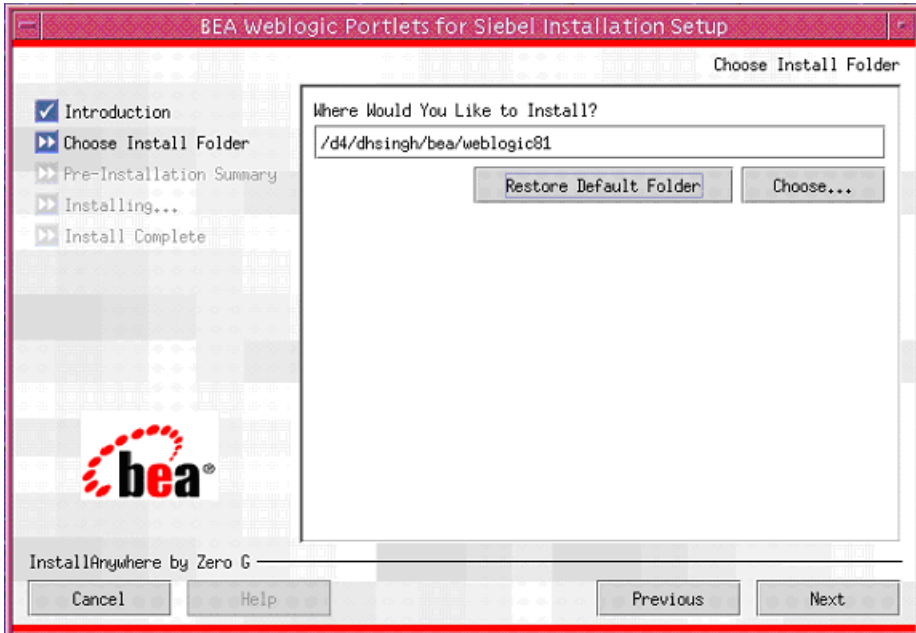
Figure 8 Introduction Screen



8. In the Choose Installation Folder screen, specify the path of the installation directory or click Choose to select the `\bea\weblogic<version>` directory. This is the path where BEA WebLogic Portlets for Siebel will be installed.
9. Click Next to continue.

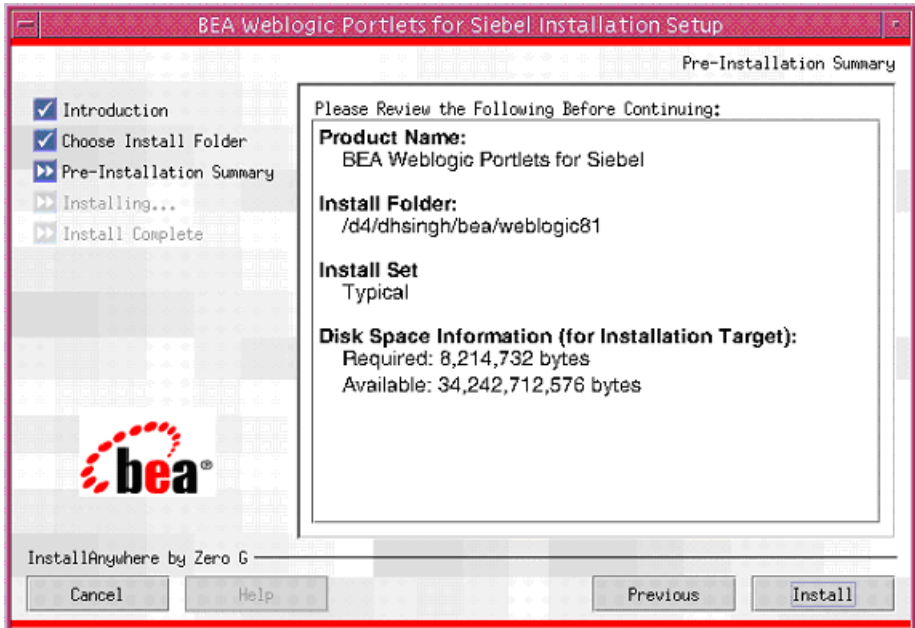
Note: If a folder other than `\bea\weblogic<version>` is selected then you need to manually copy the templates files from `<selected folder>\workshop\templates` to `\bea\weblogic<version>\workshop\templates`.

Figure 9 Choose Installation Folder Screen



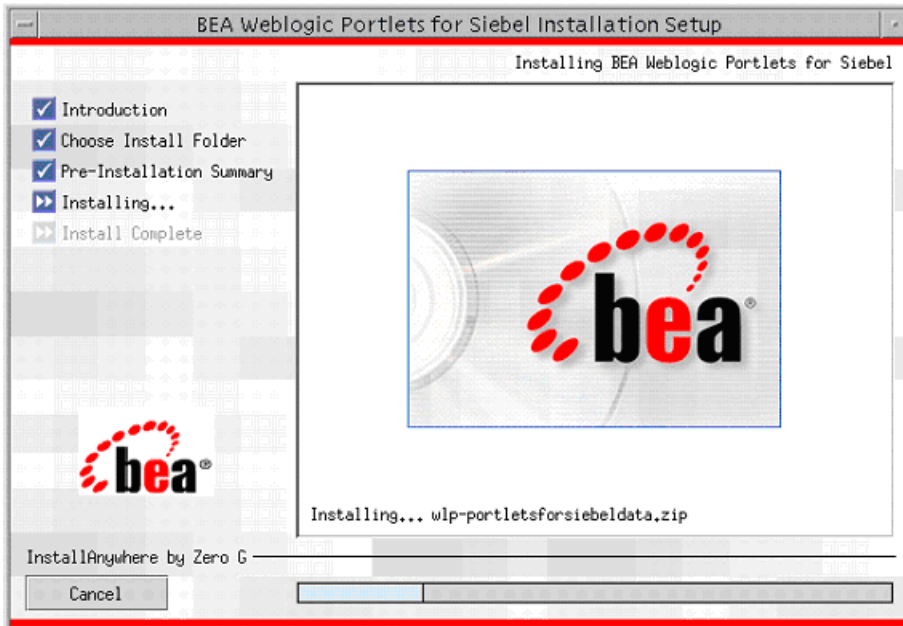
10. The Pre-Installation Summary screen displays your installation preferences. Click Next to continue.

Figure 10 Pre-Installation Summary Screen



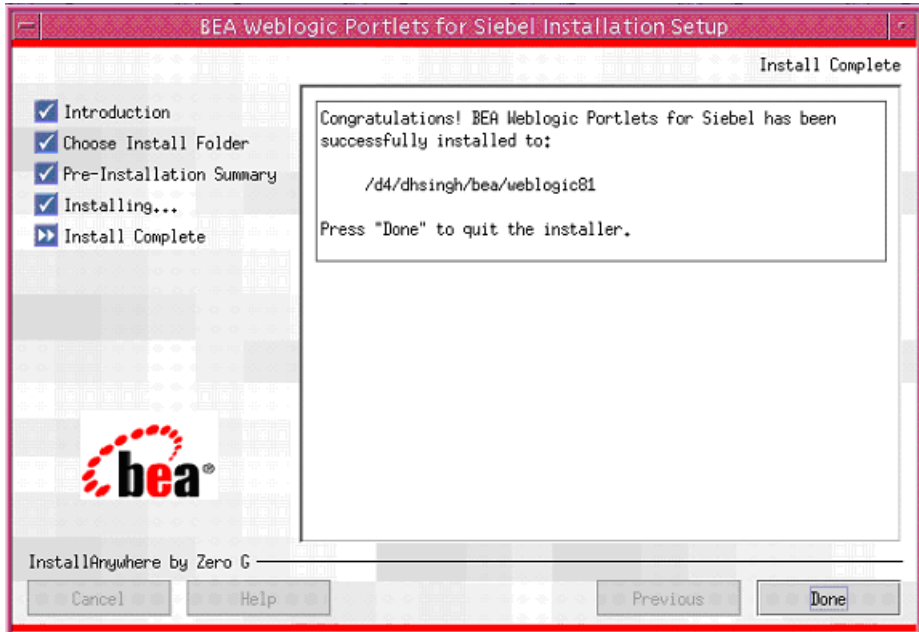
11. The Installing BEA WebLogic Portlets For Siebel screen displays the progress of the installation.

Figure 11 Installing Screen



12. The Install Complete screen confirms that BEA WebLogic Portlets for Siebel was installed successfully. Click Done to complete the installation.

Figure 12 Install Complete Screen



Reviewing the Installation

The installer will install files in the following directories:

- Product Documentation will be copied into a directory at
`<%BEA_HOME%>\weblogic<version>\portal\thirdparty\siebelportlets\docs`
- **Note:** Depending on the type of installation the product documentation might be shipped separately.
- Workshop Application Template will be copied into
`<%BEA_HOME%>\weblogic<version>\workshop\templates`
- DDL and DML scripts will be copied into a subdirectory of
`<%BEA_HOME%>\weblogic<version>\portal\thirdparty\siebelportlets\scripts`

Configuring the BEA WebLogic Portal

After the installation is completed, perform the following tasks using the BEA WebLogic Workshop.

For a New Portal:

1. Create a new Basic WebLogic Portal Domain using the Configuration Wizard.
2. Create a new Portal Application in WebLogic Workshop.
3. Create a new Portal Project.
4. In the WebLogic Workshop's Application, right-click the Data directory and choose Install > PortletsForSiebelPropertySet.
5. In the WebLogic Workshop's Application, right-click the portal project directory and choose Install > Portlets for Siebel.

Downloading the Third Party Software

Table 1 List of JAR files required for BEA WebLogic Portlets

JAR file	Component	Download from /Copy From	Directory
xercesImpl.jar xalan.jar xml-apis.jar xmlParserAPIs.jar	XMLhelper	Download from http://xml.apache.org/dist/xerces-j/old_xerces2/	<%BEA_HOME%>\user_projects\application\<portalapplication>\<portalproject>\WEB-INF\lib Example: C:\bea\user_projects\applications\BeaPortalNetApp\beaportal\WEB-INF\lib
classes12.zip (JDBC driver for Oracle database)	BEAPortalnet dbAccessLayer	Download the appropriate driver from http://otn.oracle.com/software/index.html OR Copy from <%ORACLE_HOME%>/jdbc/lib directory.	Set it in the CLASSPATH

Table 1 List of JAR files required for BEA WebLogic Portlets (Continued)

SiebelJI_Common.jar	Siebel	Copy from the Siebel installed directory.	<%BEA_HOME%\user_projects\application\<portalapplication>\<portalproject>\WEB-INF\lib
SiebelJI_enu.jar	Siebel		
SiebelJI.jar	Siebel		
Jce.jar	Encryption		
bcprov-jdk14-122.jar	Encryption		

Downloading Oracle JDBC Drivers

To download Oracle JDBC drivers, you can either:

1. Go to the URL <http://otn.oracle.com/software/index.html> and look for the appropriate driver.
2. Sign in and download the `classes12.zip`.
3. Set it in the CLASSPATH.

Or, if you already have Oracle installed:

1. Set the CLASSPATH for `classes12.zip` to the `<%ORACLE_HOME%/jdbc/lib` directory.

Configuration and Settings for Siebel (on Unix)

Make the following changes on the Unix system:

1. Open the file `startWLS.sh` located in `${WL_HOME}/server/bin` directory, for editing.
2. At the bottom of the file, locate the following `java` command that starts the application.

```
"${JAVA_HOME}/bin/java" ${JAVA_VM} ${MEM_ARGS} ${JAVA_OPTIONS}
-classpath
```

3. Add the following statement to the `java` command:

```
-Dfile.encoding="ISO8859_1"
```

as shown below:

```
"${JAVA_HOME}/bin/java" ${JAVA_VM} ${MEM_ARGS} ${JAVA_OPTIONS}
-Dfile.encoding="ISO8859_1" -classpath
```

4. Save the changes and close the file.
5. Open the DOMAIN_HOME/startWeblogic.sh file for editing.
6. At the bottom of the file, locate the following java command:

```
 ${JAVA_HOME}/bin/java  ${JAVA_VM}  ${MEM_ARGS}  ${JAVA_OPTIONS}
 -Dweblogic.Name=${SERVER_NAME}
```

7. Modify the java command with the following statement:

```
-Dfile.encoding="ISO8859_1"
```

as shown below:

```
 ${JAVA_HOME}/bin/java  ${JAVA_VM}  ${MEM_ARGS}  ${JAVA_OPTIONS}
 -Dfile.encoding="ISO8859_1" -Dweblogic.Name=${SERVER_NAME}
```

8. Save the changes and close the file.
9. Copy the jar files SiebelJI_Common.jar, SiebelJI_enu.jar, SiebelJI.jar to any directory.
10. Open the \$DOMAIN_HOME/setDomainEnv.sh file for editing.
11. Add the files to the CLASSPATH variable.
12. Save the changes and close the file.

Configuration and Settings for BEA WebLogic Portlets

Setting Up Siebel Portlets Repository

Creating Schema and Importing Metadata in MS SQL Server

To create schema and import metadata for WebLogic Portlets for Siebel in MS SQL Server run the following scripts in MS SQL Server's Query Analyzer in the order given below.

- If WebLogic Portlets for Siebel has not been installed on your machine, then run the following scripts.

The scripts for creating schema are located at the following path:

```
<%BEA_HOME%>\weblogic<version>\portal\thirdparty\siebelportlets\scripts\schema\mssql
```

1. MSSQL_PNET_DROP_TABLE.SQL

2. MSSQL_PNET_CREATE_TABLES.SQL
3. MSSQL_PNET_DROP_FKEYS.SQL
4. MSSQL_PNET_CREATE_FKEYS.SQL

5. The script for importing metadata is located at the following path:

```
<%BEA_HOME%>\weblogic<version>\portal\thirdparty\siebelportlets\scripts\data
```

MSSQL_PNET_INSERT_SCRIPTS.SQL

- If WebLogic Portlets for SAP has been installed on your machine, then run the following queries:

1. ALTER TABLE PNET_USER_PARAM_MAP ADD PARAM_VALUE1 VARCHAR(30);
2. ALTER TABLE PNET_USER_PARAM_MAP ADD PARAM_VALUE2 VARCHAR(30);

Creating Schema and Importing Metadata in Oracle

To create schema and import metadata for BEA WebLogic Portlets in Oracle database run the following scripts in Oracle's SQL Plus in the order given below:

- If WebLogic Portlets for SAP has not been installed on your machine, then run the following scripts:

The scripts for creating schema are located at the following path:

```
<%BEA_HOME%>\weblogic<version>\portal\thirdparty\siebelportlets\scripts\schema\oracle
```

1. ORACLE_PNET_DROP_SEQUENCE.SQL
2. ORACLE_PNET_DROP_FKEYS.SQL
3. ORACLE_PNET_DROP_TABLE.SQL
4. ORACLE_PNET_CREATE_TABLES.SQL
5. ORACLE_PNET_CREATE_SEQUENCE.SQL
6. ORACLE_PNET_CREATE_FKEYS.SQL
7. The script for importing metadata is located at the following path:

```
<%BEA_HOME%>\weblogic<version>\portal\thirdparty\siebelportlets\scripts  
\data
```

ORACLE_PNET_INSERT_SCRIPTS.SQL

- If WebLogic Portlets for SAP has been installed on your machine, then run the following queries:
 1. ALTER TABLE PNET_USER_PARAM_MAP ADD PARAM_VALUE1 VARCHAR2 (30);
 2. ALTER TABLE PNET_USER_PARAM_MAP ADD PARAM_VALUE2 VARCHAR2 (30);

Configuring the SiebelPortalNet.properties File

To configure the properties file:

1. Open the SiebelPortalNet.properties file from the
\`bea\user_projects\applications\<application>\<project>\WEB-INF\classes`
subfolder for the product installed and change the settings.
2. Modify the repository connection information, `DATASOURCE=<datasource_name>`
For example: `DATASOURCE=EISDB`

Registering Java Data Source

To create a Java Data Source:

1. Start the WebLogic Server for your domain.
2. Go to Tools > WebLogic Server > DataSource Viewer. The DataSource Viewer window appears.
3. Click “New Data Source” button to add a new data source. The Configure DataSource window appears.

Figure 13 Configuring DataSource (for Oracle) Screen

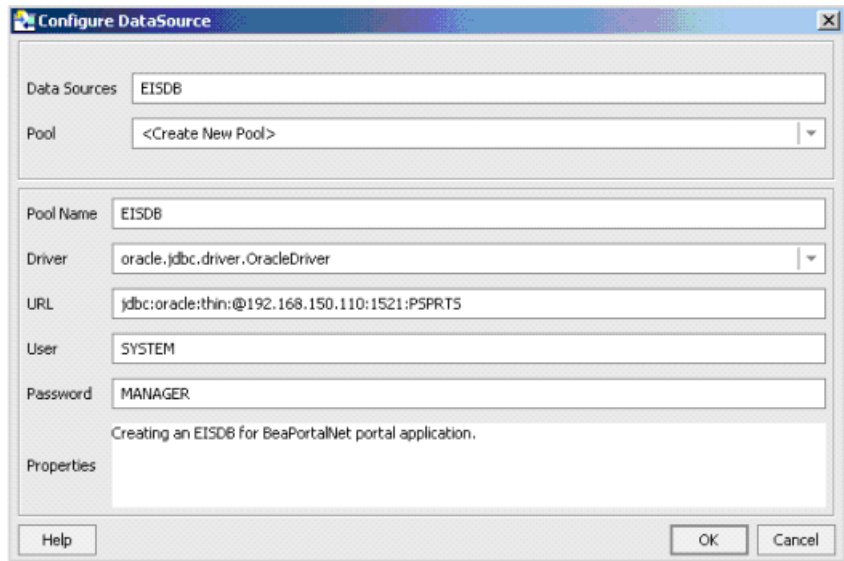
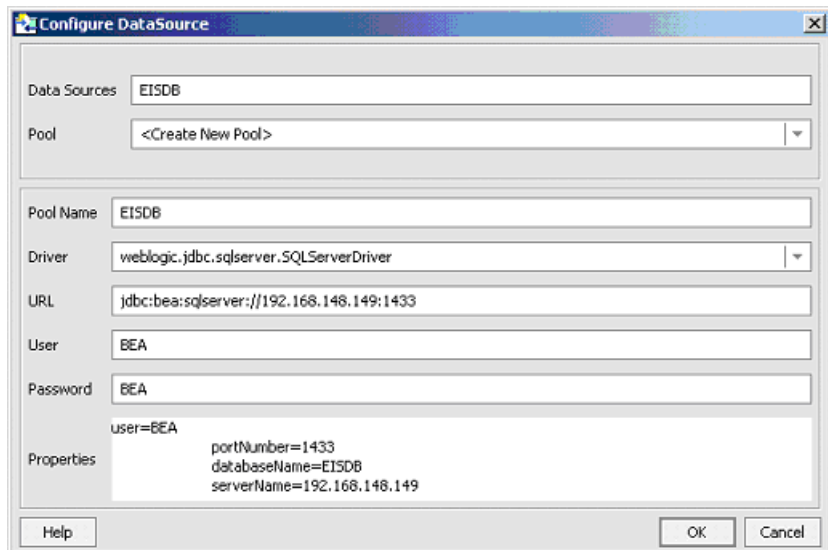


Figure 14 Configuring Data Source (for MS SQL Server) Screen



4. Enter the Data Sources as EISDB.
5. Select the Pool as <Create New Pool>.
6. Enter the Pool Name as EISDB.
7. Configure the Driver, URL, User and Password and click OK.

Activating the License for BEA WebLogic Portlets

To activate the license for BEA WebLogic Portlets:

1. Copy the license file `license.bea` into the `<%BEA_HOME%>` directory.
2. Restart the WebLogic Portal server.
3. Login to BEA WebLogic Portlets with the `weblogic` account.

Uninstalling BEA WebLogic Portlets for Siebel

To uninstall BEA WebLogic Portlets for Siebel:

1. Shut down any servers that are running. If any of these servers is configured as a Windows service, you should stop the service(s) before uninstalling the software.
2. Navigate to the directory where BEA WebLogic Portlets is installed.
3. Navigate to the `\Uninstall_Bea Weblogic Portlets for Siebel` directory.
4. Run the `Uninstall BEA Weblogic Portlets for Siebel.exe` uninstallation program.
5. Click Next to start the uninstall program.
6. Select Complete Uninstall or Uninstall Specific Features option and click Next.
7. Click Done to exit the uninstallation program.

Troubleshooting

Table 2 Troubleshooting WebLogic Portlets for Siebel

No.	Problem	Cause
1	Running the scripts throws SQL error	Make sure that you run the scripts in the order specified in the installation document

Table 2 Troubleshooting WebLogic Portlets for Siebel

2	Unable to connect to the database	Check if the JDBC Drivers are configured properly.
3	Invalid datasource entry error	Check if the DataSource is configured properly in WebLogic Workshop
4	Cannot connect to Siebel	Verify if the files SiebelJJI, SiebelJJI_Common and SiebelJJI_enu are placed under the directory <%BEA_HOME%\user_projects\application\<portal application>\<portalproject>\WEB-INF\lib
5	License Expired	Check if the license.bea file is updated under the folder <%BEA_HOME%>
6	Unknown Source Exception	Make sure that you have given the IP Address and machine name of the Database server and Siebel server in the file named hosts.file which is located at C:\windows\system32\drivers\etc
7	Unable to run the installation setup for Unix	Check if Java Virtual Machine (JVM) is installed. Check if the environment variables PATH and JAVA_HOME are set.

Installation Verification Tests for BEA WebLogic Portlets for Siebel

Customer Name

Install Date

Install Specialist

Install Contact

DBMS Type

Version

Operating System

Version

Instructions

This section provides instructions on running the installation verification test.

1. This Installation Verification Test is designed to confirm that BEA WebLogic Portlets for Siebel has been installed properly. The Installation Verification Test is not designed to serve as a comprehensive test of BEA WebLogic Portlets for Siebel functionality.
2. BEA specialists performing this test should provide one copy of this test to the customer installation contact by attaching it to a copy of the Post Installation Checklist.
3. Unless otherwise indicated, each section covers functionality for all platforms that BEA WebLogic Portlets for Siebel currently supports. Please note that not all products are available on all platforms.
 - Microsoft SQL Server on Windows
 - Oracle on Windows
4. The BEA WebLogic Platform Installation Verification Test should be completed prior to starting this test.
5. BEA WebLogic Portlets for Siebel must have been installed as per the Installation Guide for BEA WebLogic Portlets for Siebel.
6. The following tests should be performed using BEA WebLogic Workshop and BEA WebLogic Administration screen.
7. Please refer to the User Guide and the Administration Guide for BEA WebLogic Portlets for Siebel for more details on using the product.

Installation Verification

Verify Project Templates

Project related templates would be copied into a directory at

`<%BEA_HOME%>\weblogic81\workshop\templates.`

Verify that the following files are present in the folder:

- `wlp-portletsforsiebel.zip`
- `wlp-portletsforsiebeldata.zip`

Verify Sample View Templates

Sample view templates (for .jsp and .jpf files) will be copied into a directory at `<%BEA_HOME%>\weblogic81\portal\thirdparty\siebelportlets\newportlets`.

Verify that the following files are present in the folder:

- `viewtemplate.jsp`
- `viewtemplatecontroller.jpf`

Verify Product Documentation

Third party product documentation, if provided, will be copied into a directory at `<%BEA_HOME%>\weblogic81\portal\thirdparty\siebelportlets\docs`.

Verify that the following files are present in the folder:

- `BEA WebLogic Portlets Administration Guide.doc`
- `BEA WebLogic Portlets Installation Guide.doc`
- `Development Guide for BEA WebLogic Portlets.doc`
- `User Guide for BEA WebLogic Portlets.doc`

Verify SQL Scripts

SQL scripts for MS SQL Server will be copied into a subdirectory of `<%BEA_HOME%>\weblogic81\portal\thirdparty\siebelportlets\scripts\schema\ms sql`.

Verify that the following script files are copied into the folder:

- `MSSQL_PNET_DROP_TABLE.SQL`
- `MSSQL_PNET_CREATE_TABLES.SQL`
- `MSSQL_PNET_DROP_FKEYS.SQL`
- `MSSQL_PNET_CREATE_FKEYS.SQL`

Also verify that the insertion script file `MSSQL_PNET_INSERT_SCRIPTS.SQL` is copied into the following folder:

`<%BEA_HOME%>\weblogic81\portal\thirdparty\siebelportlets\scripts\data`

SQL scripts for **Oracle** will be copied into a subdirectory of
<%BEA_HOME%>\weblogic81\portal\thirdparty\siebelportlets\scripts\schema\oracle.

Verify that the following files are present in the folder:

- ORACLE_PNET_DROP_TABLE.SQL
- ORACLE_PNET_CREATE_TABLES.SQL
- ORACLE_PNET_DROP_SEQUENCE.SQL
- ORACLE_PNET_CREATE_SEQUENCE.SQL
- ORACLE_PNET_DROP_FKEYS.SQL
- ORACLE_PNET_CREATE_FKEYS.SQL

Also verify that the insertion script file ORACLE_PNET_INSERT_SCRIPTS.SQL is copied into the following folder:

<%BEA_HOME%>\weblogic81\portal\thirdparty\siebelportlets\scripts\data.

Database Verification

Verify Database

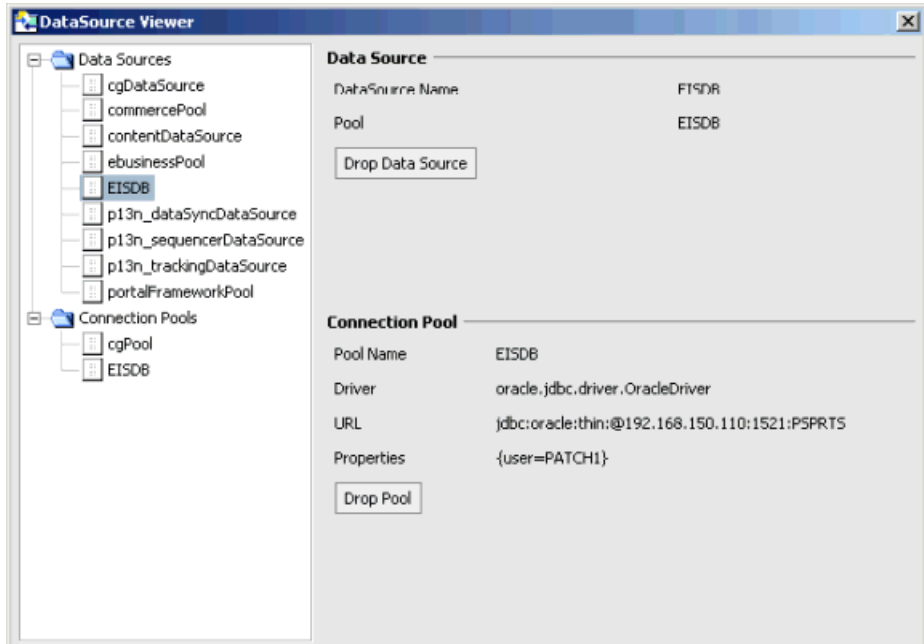
Prerequisite: DataSource Creation has been done either using the BEA WebLogic Workshop / WebLogic console.

Assumption: DataSource/Connection pool has been created using either BEA WebLogic Workshop/WebLogic console as specified in the Installation document.

To verify database settings:

1. In BEA WebLogic Workshop, select Tools > WebLogic Server > DataSource Viewer.
2. Select the datasource as EISDB.
3. The following datasource information should be displayed:

Figure 15 DataSource Viewer Screen



Note: The DataSource Name field should display as above, but the remaining fields may contain different information depending on your specific installation.

EIS Administration Verification

Verify EIS Administration Portlet Initialization and Authentication

To verify administration authentication:

1. Build the project and start the BEA WebLogic server.
2. Log in to BEA WebLogic Portlets for Siebel using the administrator account, with
Username: weblogic
Password: weblogic
3. Verify that the server is running. Also verify that you are able to login successfully.

Verify EIS Instance Creation

To create an EIS instance:

1. Open the Portal.
2. Login to BEA WebLogic Portal as administrator.
3. Click the Administration tab.
4. Click the EIS Instance Setup link.
5. Select the EIS Application as SIEBEL7.0.4 and click Create.
6. Enter an Instance Name of your choice.
7. Enter the Native Base URL. This is the URL of the Siebel system.
8. Enter the User Id and Password for logging in to the Siebel system.
9. Enter the Gateway Name.
10. Enter the Enterprise Name.
11. Enter the Object Name.
12. Enter the Siebel Server Name.
13. Enter the number of Maximum Connections allowed for the Siebel system.
14. Click Submit to create the instance.
15. Verify that the newly created EIS instance appears in the list of Existing EIS instances.

Verify EIS Credential Mapping

To create an EIS credential mapping:

1. Login to BEA WebLogic Portlets as administrator.
2. Click the Administration tab.
3. Click the EIS Credential Mapping Details link.
4. Use any one of the following search criteria:
 - a. Enter the Portal User Id and click search.

- b. Click Show All Portal Users link.
- c. Click on an alphabet with which the portal user's login name starts.
5. The list of Portal Users matching the search criteria is populated in the Portal User Id drop down box. Select the Portal User Id.
6. Select the EIS Name.
7. Select the Instance Name.
8. Click Search. The list of existing EIS User credentials is displayed.
9. Select the User Type as either CUSTOMER or EMPLOYEE.
10. Click Create.
11. Enter the Siebel User Id and Password.
12. Select the Allow Drilldown To EIS option to give Native drill down to view the information in the Portlet through ITS (Internet Transaction Service) by the portal user as required.
13. Select the Allow Detailed Information option to give Target drilldown to view the Siebel window information in the Portlet by the portal user as required.
14. Select the Status of the user as Active to activate this EIS user account in retrieving information from the selected EIS Instance (in above step), Otherwise select the Status as Inactive. Only one EIS mapping will be active at a given time.
15. Click Submit.
16. Verify that the newly created EIS mapping appears in the list of EIS credential mappings.

Portlets Verification

Verify Authentication

1. Log in to BEA WebLogic Portlets for Siebel using the EIS user credential mapping that you created above.
2. Verify that all the following portlets are shown:
 - Sales Order
 - Shipping Status

- Service Request
- Service Request Activity
- My Accounts
- My Team Accounts
- Agreements By Expiry Date
- All Assets By Account
- Contacts By Account
- Customer List With Address Info
- Repair Status
- RMA Order Status

Note: The visibility of the portlets will vary depending on the permission set by the administrator to the users for the above listed portlets.

Verify the Sales Order Portlet

Prerequisite: The user has successfully logged into the Portal.

To view an existing sales order:

1. Scroll down to the Sales Order portlet. Verify that the list of sales orders is displayed.
2. Click the Order # hyperlink to view details for the required Sales Order.
3. Verify that the Siebel screen for the selected Sales Order is displayed.

To create a new sales order:

1. Scroll down to the Sales Order portlet.
2. Click Create Sales Order hyperlink. A new screen is displayed.
3. Search for the Customer Id.
4. Search for the Product.
5. Enter the Quantity Requested.
6. Select the Product Discount percentage.

7. Select the Priority.
8. Specify the Promised Delivery Date.
9. Click Create. The Sales Order portlet is displayed.
10. Verify that the new sales order was created.

Verify the Shipping Status Portlet

Prerequisite: The user has successfully logged into the Portal.

To edit / update a sales order shipping status:

1. Select the sales order by clicking on the Status of the Sales Order portlet.
2. The Sales Order Shipping Status portlet shows the shipping status information pertaining to the selected sales order.
3. Under the Actions column, click the edit icon in order to edit / update the sales order shipping status details.
4. Update the details for Quantity Requested and Status.
5. Click Update. The Shipping Status portlet is displayed.
6. Verify that the shipping status was updated.

Verify the My Accounts Portlet

Prerequisite: The administrator has given permission, for this portlet, to the portal user, who can be either an employee or an administrator or both.

To view My Accounts Portlet:

1. Log in to BEA WebLogic Portlets for Siebel.
2. Scroll down to the My Accounts portlet. Verify that the list of accounts is displayed.
3. Click the Account Name hyperlink to view details of that Account.
4. Verify that the Siebel screen for the Account is displayed.

