



Siebel eService Administration Guide for Siebel Open UI

Siebel Innovation Pack 2013

Version 8.1/8.2, Rev. A

December 2013

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What's New in This Release

What's New in Siebel eService Administration Guide for Siebel Open UI, Version 8.1/8.2, Rev. A

Siebel eService for Siebel Open UI Version 8.1/8.2 is the first release of this new product. [Table 1](#) lists a new chapter in this guide. The new features described in [Table 1](#) are available in Siebel CRM version 8.1.1.11, Siebel CRM version 8.2.2.4, and later.

Table 1. Chapter in Siebel eService Administration Guide for Siebel Open UI, Version 8.1/8.2, Rev. A

Topic	Description
Chapter 3, "Setting Up Siebel eService"	New chapter. It includes information about the setup tasks that you must perform to deploy Siebel eService for Siebel Open UI for an existing deployment that you originally installed for an earlier version.

What's New in Siebel eService Administration Guide for Siebel Open UI, Version 8.1/8.2

Siebel eService for Siebel Open UI Version 8.1/8.2 is the first release of this new product. [Table 2](#) lists the chapters in this guide. The new features described in [Table 2](#) are available in Siebel CRM version 8.1.1.11, Siebel CRM version 8.2.2.4, and later.

Table 2. Chapters in Siebel eService Administration Guide for Siebel Open UI, Version 8.1/8.2

Topic	Description
Chapter 2, "About Siebel eService"	New chapter. Includes overview information about Siebel eService.
Chapter 4, "Configuring Siebel eService"	New chapter. Includes information about configuring the look and feel of the Siebel eService Web site.
Chapter 5, "Administering Siebel eService"	New chapter. Includes information about administering and setting up the functionality that customers can access on the Siebel eService Web site.
Appendix A, "Workflows for Siebel eService"	New appendix. Includes information about the workflows for Siebel eService.

2

About Siebel eService

This chapter includes overview information about Siebel eService. It includes the following topics:

- [Tasks for Customers on the Siebel eService Web Site on page 7](#)
- [Tasks for Customer Service Representatives in Siebel eService on page 9](#)
- [Features of Siebel eService on page 9](#)
- [Requirements for Installing Siebel eService on page 10](#)
- [About Deploying Siebel eService on page 11](#)

Tasks for Customers on the Siebel eService Web Site

Siebel eService provides a Web site where customers can access service information. They can view more details on the Web site by clicking icons and drilling down on links.

Customers can perform the following tasks on the Siebel eService Web site:

- **Log in.** Customers who do not register on the Siebel eService Web site can only view only certain sections of the Web site, such as company contact information. They see the home page of the Web site when they click the HOME tab. They can register on the Web site to create their profiles, and then gain access to additional functionality on the Web site, such as functionality to create and submit service requests and to update their profiles. After they register, they see a page with the Recent History view when they click the HOME tab. Customer service representatives can use Siebel Call Center to register customers on the Web site.

Customers who are not registered on Web site click the New User link after they click the Log In link on the home page, and complete a form to register on the Siebel eService Web site.

Customers who are registered on the Web site click the Log In link on the home page, and enter a user name and password to access the additional functionality on the Web site. Registered customers who forget their passwords click the Forgot Password link after they click the Log In link on the home page, and complete a form to obtain a new password.

- **Navigate the Web site.** Customers can click the How Can We Help? icon near the top of any page to access a carousel of links for site functionality. They can click these carousel links to navigate to a Web page where they can complete a task. Customers can click the links at the top of any page to access some of these same Web pages.
- **Manage profiles.** Customers who register on the Siebel eService Web site can update their profile information and passwords.

Customers who register click the UPDATE PROFILE link in the carousel that appears when they click the How Can We Help? icon near the top of any page, or click the My Profile link at the top of any page, and complete a form to update their profile information and passwords.

- **Perform full text searches.** Customers can search for information on the Siebel eService Web site. Search results are ranked according to relevancy, but customers cannot see content for which they do not have access permission.

Customers click the Search link at the top of any home page to show or hide the functionality for searching. They can specify the type of search from a drop-down list, enter text in the Search text box, and click the Search button find information on the eService Web site. If they specify a data source of File System OSES (Oracle Secure Enterprise Search), then they can click the Advanced Search button to specify additional criteria for their search. They can also click the Search Setting button to specify the formatting for the search results. For information about configuring Siebel Search and Siebel Find and about setting up Siebel Search with Oracle Secure Enterprise Search, see *Siebel Search Administration Guide*.

- **Find branches.** Customers can find the company branch locations that are nearest to them so that they can visit the branches. Application administrators can link search results for branch locations to map services so that customers can view applicable directions and a map from an online map service provider. Records containing information about branch locations appear as tiles in a carousel.

Customers click the LOCATE BRANCH link in the carousel that appears when they click the How Can We Help? icon near the top of any page, or click the Locate Branch link at the top of any page, and complete a form to find branch locations. Customers who do not register on the Siebel eService Web site can click the LOCATE BRANCH link in the carousel on the home page to access the form.

- **Access company contact information.** Customers can access company contact information to communicate with the company through communication channels, such as email, telephone, fax, and postal mail. Records containing contact information appear as tiles in a carousel.

Customers click the CONTACT US link in the carousel that appears when they click the How Can We Help? icon near the top of any page, or click the Contact Us link at the top of any page to access the Contact Us view. Customers who do not register on the Siebel eService Web site can click the CONTACT US link in the carousel on the home page to access the view. In the Contact Us view, they can complete a form to send an email to the company. In this view, they can also access company contact information.

- **Manage service requests.** Customers who register on the Siebel eService Web site can submit, add updates to, and track service requests about issues that they encounter. They can attach documents to service requests to help them communicate issues. After they create service requests, they can add updates to them, but they cannot change their initial service requests. A customer service representative can use Siebel Call Center to associate solutions (relevant documents) with service requests, to attach documents to service requests, and to add updates to service requests. Records containing service requests, service request attachments, service request updates, and service request solutions appear as tiles in a carousel.

Customers who register click the VIEW OR SUBMIT SERVICE REQUESTS link in the carousel that appears when they click the How Can We Help? icon near the top of any page, or click the SERVICE REQUESTS tab on the home page to manage service requests.

Customers can click the left arrow icon and the right arrow icon to navigate within any carousel. Customers can click the button with a triangle pointing down to show the tiles within a carousel and the button with the triangle pointing up to hide the tiles within a carousel.

- **Use social media.** Customers can use social media applications, such as Facebook[®], to communicate with your company.

Customers can click the HOME tab and then click the icons at the bottom of the page to access social media sites for your company.

Tasks for Customer Service Representatives in Siebel eService

Because the Siebel eService Web site allows customers to serve themselves, customer service representatives have more time to work on other tasks. Customer service representatives can use Siebel eService to perform the following tasks to help customers:

- Review service requests that customers submit on the Siebel eService Web site and that Siebel Assignment Manager assigns to them.
- Access customer history that is independent of the channel of communication that the customer uses.
- Respond to email that customers submit on the Siebel eService Web site. Customer service representatives can view their inbound email queues, and for each message, view the related customer profile and service request information. Also, they can use solution records to compose replies to inbound email.
- Exchange knowledge and information with customers in social media applications on the Siebel eService Web site.
- Create and update user names and passwords for customers. The customer service representative typically must be authenticated by a directory, such as Netscape LDAP Directory Server or Microsoft Active Directory Server, using the Siebel security adaptor.

Features of Siebel eService

Siebel eService includes the following features:

- **Integration with your company Web site.** You can configure Web pages, views, applets, and cascading style sheets to conform to your business model and the look and feel of your company Web site. For more information, see [“Configuring Siebel eService” on page 23](#).
- **Web-delegated customer administrators.** In a business-to-business situation, you can create Web-delegated customer administrators for the customer company. These administrators can create and change information in customer profiles, such as the user names for their customers. Consequently, the administrative load at the host company is decreased. For more information, see [“About Authentication for Siebel eService” on page 28](#).
- **Data visibility controls.** You can control the views and data that customers can see on the Siebel eService Web site. The responsibility, organization, access group, and position of a customer determine these views and this data. For more information, see [“Access Control for Siebel eService” on page 29](#).

- **Email notifications.** By using Siebel Workflow, you can notify customers through email of changes in the status of their service requests. For more information, see “[About Email Notifications](#)” on page 30.

NOTE: Email notifications are not included in the preconfigured Siebel eService application, but you can implement this feature.

Requirements for Installing Siebel eService

The following items are required to install Siebel eService:

- **Database server.** For a list of supported database servers, including version and connectivity software information, see *Siebel System Requirements and Supported Platforms* on Oracle Technology Network.
- **Siebel Enterprise Server.** For a list of Siebel Enterprise Server requirements, see *Siebel System Requirements and Supported Platforms* on Oracle Technology Network.
- **Web server.** For a list of supported Web servers, including vendor and hardware software configuration information, see *Siebel System Requirements and Supported Platforms* on Oracle Technology Network.

NOTE: For Siebel CRM product releases 8.1.1.9 and later and for 8.2.2.2 and later, the system requirements and supported platform certifications are available from the Certification tab on My Oracle Support. For information about the Certification application, see article 1492194.1 (Article ID) on My Oracle Support.

For more information about installing Siebel eService for Siebel Open UI, see *Siebel Installation Guide for Microsoft Windows* or *Siebel Installation Guide for UNIX* and *Siebel Maintenance Release Guide* on My Oracle Support.

NOTE: The *Siebel Bookshelf* is available on Oracle Technology Network (<http://www.oracle.com/technetwork/indexes/documentation/index.html>) and Oracle Software Delivery Cloud. It might also be installed locally on your intranet or on a network location.

Siebel eService for Siebel Open UI uses the Self Service Object Manager (*LANG*) component (SServiceObjMgr_*lang* alias) in the Siebel Call Center component group. You must make sure that Siebel Open UI is enabled for this component by verifying that the EnableOpenUI and HighInteractivity parameters for this component are set to a value of True. For Siebel eService for Siebel Open UI, you must again implement any customizing that you implemented for Siebel eService for standard interactivity.

The configuration file for Siebel eService for Siebel Open UI is sservice.cfg, and the virtual directory for Siebel eService for Siebel Open UI is sservice_*lang*. For information about the setup tasks that you must perform to deploy Siebel eService for Siebel Open UI for an existing deployment that you originally installed for an earlier version, see [Chapter 3, “Setting Up Siebel eService.”](#)

About Deploying Siebel eService

After Siebel eService is installed, you can configure it, administer it, and deploy it as an integrated part of your company Web site.

Using a text editor or an HTML authoring tool, you can change the Siebel Web templates (SWT files) and cascading style sheets to integrate the appropriate company layout and formatting. For example, you might change the background color or font size, and decide not to use the HTML frameset. For more information, see [Chapter 4, "Configuring Siebel eService."](#)

After the configuration of Siebel eService is complete, the application administrator can set up the functionality that customers can access on the Siebel eService Web site. For more information, see [Chapter 5, "Administering Siebel eService."](#)

After the configuration and administration tasks are complete, the application developer can work with the general Webmaster who can help integrate the Siebel eService Web site into your company Web site. Typical tasks for this integration follow:

- Copy new HTML and images to the public directory on the Web server computer.
- Add a new link from your company Internet or intranet Web site to Siebel eService.

3

Setting Up Siebel eService

This chapter includes information about the setup tasks that you must perform to deploy Siebel eService for Siebel Open UI for an existing deployment that you originally installed for an earlier version. It includes the following topics:

- [About Setting Up Siebel eService on page 13](#)
- [Roadmap for Setting Up Siebel eService on page 14](#)
- [About the Application Object Manager Components for Siebel eService on page 15](#)
- [Process of Adding the Application Object Manager Components for Siebel eService on page 15](#)
- [Process of Adding the Virtual Directories for Siebel eService on page 19](#)

About Setting Up Siebel eService

Siebel eService for Siebel Open UI was initially released in Siebel CRM version 8.1.1.11 and version 8.2.2.4. (These releases are also known as Siebel Innovation Pack 2013.) References in this chapter to the *current release* are to Siebel CRM version 8.1.1.11, version 8.2.2.4, or a later version.

Whether you must perform the tasks described in this chapter depends on which of the following installation cases applies to you:

- If you install the current release in a new deployment (or as a new installation) and perform the required configuration tasks after installation, then the Application Object Manager components and virtual directories for Siebel eService for Siebel Open UI are available for all installed and deployed languages. You do not have to perform the tasks described in this chapter.
- If you install the current release as a patch installation for an existing Siebel CRM installation of an earlier version, such as version 8.1.1.10, version 8.2.2.3, or an earlier version, then, to use this Siebel eService application, you must perform the tasks in this chapter. These tasks create the Application Object Manager components and virtual directories that Siebel eService for Siebel Open UI uses for all installed and deployed languages.

NOTE: For the Siebel Enterprise Server and the Siebel Web Server Extension (SWSE), installing a Siebel Fix Pack release for the current release as a patch installation is also called performing a migration installation. For more information about performing a migration installation, see the *Siebel Installation Guide* for the operating system you are using.

The tasks described in this chapter apply to any languages that are part of your existing deployment before you install the current release. For a multilingual deployment, you must perform some tasks multiple times, once for each language.

After you install the current release (using either of the installation cases) and set up Siebel eService for Siebel Open UI, you can use the Configuration Wizard tasks to deploy any additional languages on the Siebel Server and the SWSE. These tasks add all of the applicable Application Object Managers and virtual directories for these languages, including those for Siebel eService for Siebel Open UI. After you perform these tasks for the additional languages, you do not have to perform the tasks that are described in this chapter. For more information about installing and deploying Siebel Business Applications with multiple languages, see the *Siebel Installation Guide* for the operating system you are using.

Roadmap for Setting Up Siebel eService

To set up Siebel eService for Siebel Open UI for an existing deployment, perform the following processes and tasks:

- 1 Review the information in [“About Setting Up Siebel eService” on page 13](#).
For more information about installing Siebel eService, see [“Requirements for Installing Siebel eService” on page 10](#).
- 2 Install the current release of Siebel CRM as a patch installation (migration installation) for an existing installation of Siebel CRM version 8.1.1.10, version 8.2.2.3, or an earlier version.
NOTE: For more information about installing Siebel CRM, see the *Siebel Installation Guide* for the operating system you are using. The overall installation process includes many specific tasks and requirements that are not mentioned here.
- 3 Run Incremental Repository Merge for the Siebel database.
NOTE: You must run Incremental Repository Merge after you install the current release of Siebel CRM as a patch installation (migration installation) for an existing installation of an earlier version. For more information about running Incremental Repository Merge, see *Siebel Database Upgrade Guide*.
- 4 Add the Application Object Manager components for Siebel eService for Siebel Open UI.
For more information, see [“Process of Adding the Application Object Manager Components for Siebel eService” on page 15](#).
- 5 Add the virtual directories on the Web server for Siebel eService for Siebel Open UI.
For more information, see [“Process of Adding the Virtual Directories for Siebel eService” on page 19](#).

About the Application Object Manager Components for Siebel eService

The Application Object Manager component for Siebel eService for Siebel Open UI is Self Service Object Manager (*LANG*), where *LANG* is the three-letter code for each applicable language, such as ENU for U.S. English or JPN for Japanese. The alias for this component is *SServiceObjMgr_lang*, such as *SServiceObjMgr_enu* or *SServiceObjMgr_jpn*. These components are defined in the Siebel Call Center component group. The application name for these components is Siebel Service Portal. These components use the *sservice.cfg* configuration file.

Perform the tasks to create and configure these server components for existing installations for which these components are not currently defined. For more information, see [“Process of Adding the Application Object Manager Components for Siebel eService” on page 15](#).

Then you perform the task to create the corresponding virtual directories on the Web server to support these components.

Process of Adding the Application Object Manager Components for Siebel eService

To add the Application Object Manager components, perform the following tasks:

1 [“Editing the new_comp_sia.dat File” on page 15](#)

Edit the *new_comp_sia.dat* file to include a definition for the Self Service Object Manager component.

2 [“Running the new_compdef_sia Script” on page 18](#)

Perform these tasks on each Siebel Server on which you run these components. Repeat these tasks, as needed, for each additional language that you support. For more information, see [“About the Application Object Manager Components for Siebel eService” on page 15](#).

NOTE: Perform this process only if it is required for your installation case. For more information, see [“About Setting Up Siebel eService” on page 13](#).

This process is a step in [“Roadmap for Setting Up Siebel eService” on page 14](#).

Editing the new_comp_sia.dat File

You edit the *new_comp_sia.dat* file to define the Self Service Object Manager (*LANG*) component, where *LANG* is an installed language. You can edit this file and then run the *new_compdef_sia* script on additional Siebel Servers, as necessary.

NOTE: For any additional languages that you support for this application, repeat the following task (but change the content that you specify in [Step 7 on page 16](#)) and repeat the task in [“Running the new_compdef_sia Script” on page 18](#).

This task is a step in “[Process of Adding the Application Object Manager Components for Siebel eService](#)” on page 15.

To edit the new_comp_sia.dat file

- 1** Stop the Siebel Server.
- 2** For the Siebel Gateway Name Server, complete the following steps:
 - a** Stop the Siebel Gateway Name Server.
 - b** Back up the siebns.dat file on the Siebel Gateway Name Server.
 - c** Restart the Siebel Gateway Name Server.
- 3** On the Siebel Server computer, navigate to *SI EBSRVR_HOME/bi n/ l ang*.

In this directory, *SI EBSRVR_HOME* is the Siebel Server installation location, and *lang* is the three-letter code for the language for which you edit the new_comp_sia.dat file. (Use the backslash for Microsoft Windows; use the forward slash for UNIX or Linux.)
- 4** Back up the existing file new_comp_sia.dat.
- 5** Using an appropriate text editor, such as Notepad on Microsoft Windows, open the new_comp_sia.dat file.

NOTE: When you edit new_comp_sia.dat, do not enter any special characters, such as tabs.
- 6** If the file does not contain a section for the Siebel Call Center component group, then add the following information in the component group section of the file:
 - a** As needed, append an entry for the CallCenter component group, defined as follows:

```
[Component Group]
CallCenter = Siebel Call Center
```
 - b** As needed, create a section for the CallCenter component group, defined as follows:

```
[Call Center]
FullName = Siebel Call Center
Description = Siebel Call Center Components
CreateDisabled = TRUE
```
- 7** Add the following information in the component section of the file:
 - a** Add a new entry for the Self Service Object Manager component in the existing components section, defined as follows:

```
[Components]
SServiceObjMgr_enu = Self Service Object Manager (ENU)
```

In this example, you add the required definitions for U.S. English (ENU) in the new_comp_sia.dat file located in *SI EBSRVR_HOME/bi n/ENU*. Substitute other language codes as needed for your specific task. For example, you can add the required definitions for French (FRA).

- b** Add a new section for the Self Service Object Manager component, defined as follows:

```
[SServiceObjMgr_enu]
FullName      = Self Service Object Manager (ENU)
Alias         = ISSObjMgr
Description   = Siebel Self Service Object Manager
CompGrp      = Call Center
CompType     = AppObjMgr
FixedParam: DataSource      = ServerDataSrc
FixedParam: Lang           = ENU
Param: CfgRepositoryFile   = siebel_sia.srf
Param: LocalCode          = ENU
Param: MaxTasks            = 20
FixedParam: ConfigFile     = sservice.cfg
FixedParam: NamedDataSource = ServerDataSrc, GatewayDataSrc, DataMart
Param: CFGApplicationName  = Siebel Service Portal
Param: CFGApplicationTitle = Siebel Service Portal
Param: CFGApplicationSplashText = Siebel Service Portal
Param: SearchDefName      = SelfServiceDefintion
Param: ProxyEmployee      = PROXYE
Param: LogInDomain        = EXTERNAL
Param: AllowAnonUsers     = TRUE
Param: EnableCDA          = FALSE
Param: EnableEmailClientAutomation = FALSE
Param: ListRowStyle       = Siebel List
Param: LogInView          = Login View (SelfService)
Param: SystemSWFName      = dCCHtmlType.swf
Param: UserAgentFile     = ua.ini
Param: AllowAnonUsers     = TRUE
Param: AppletSelectStyle  = Applet Select
Param: HighInteractivity  = TRUE
Param: EnableOpenUI       = TRUE
```

NOTE: The information that you specify includes several required parameter settings for the component. Some of the parameters enable Siebel Open UI, which this application requires. You can use Siebel Server Manager to configure several of the parameter settings later, for example, to tune application performance.

- 8** Save the new_comp_sia.dat file.

Next, run the new_compdef_sia script. For more information, see [“Running the new_compdef_sia Script” on page 18](#).

Running the new_compdef_sia Script

You run the new_compdef_sia script to add the server component definition that you add in the new_comp_sia.dat file that you edit for each language. For each language, the script adds the Application Object Manager component that Siebel eService for Siebel Open UI (the Self Service Portal application) uses. Perform this task immediately after you perform the task to edit the new_comp_sia.dat file. For more information, see [“Editing the new_comp_sia.dat File” on page 15](#).

When you run the script, you must specify the same language that you specify within the edited sections of the new_comp_sia.dat file.

NOTE: For any additional languages that you support for this application, repeat the task in [“Editing the new_comp_sia.dat File” on page 15](#) (but change the content that you specify in [Step 7 on page 16](#)) and repeat this task.

This task is a step in [“Process of Adding the Application Object Manager Components for Siebel eService” on page 15](#).

To run the new_compdef_sia script

- 1 Log in as a Siebel administrator user on the Siebel Server computer.
- 2 Set the SIEBEL_HOME environment variable to SES_HOME/si ebsrvr. (Use the backslash for Microsoft Windows; use the forward slash for UNIX or Linux.)
- 3 Open a command window or shell window and run a command as follows:
 - On Microsoft Windows, run a command like the following command:

```
new_compdef_sia.bat siebelgatewaynameserver:port siebelenterprise username password language
```
 - On UNIX or Linux operating systems, run a command like the following command:

```
./new_compdef_sia.ksh siebelgatewaynameserver:port siebelenterprise username password language
```

In these commands, *siebelgatewaynameserver* is the name of the Siebel Gateway Name Server, *port* is the port number that it uses, *siebelenterprise* is the name of the Siebel Enterprise, *username* is the name of the account that runs the script, *password* is the password for this account, and *language* is the language for which you create the Application Object Manager component. Specifying the port number is optional if the Siebel Gateway Name Server uses the default port number, 2320.

For example, on Microsoft Windows, you might run a command like the following command:

```
new_compdef_sia.bat siebgtwy1 myenterprise sadmi n password ENU
```

- 4 When prompted, verify that the parameters are correct.
- 5 For each language, repeat [Step 3](#) and [Step 4](#).

6 Restart the Siebel Server.

The new component is added for each specified language.

Next, create the virtual directories. For more information, see [“Process of Adding the Virtual Directories for Siebel eService” on page 19](#).

Process of Adding the Virtual Directories for Siebel eService

To add the virtual directories, perform the following tasks:

1 [“Editing the new_virdirs Script” on page 19](#)

Edit the new_virdirs script to include the virtual directory name required for Siebel eService for Siebel Open UI (the Self Service Portal application).

2 [“Running the new_virdirs Script” on page 20](#)

Run the new_virdirs script and specify all of the languages for which you want to create a virtual directory.

Perform these tasks on each Web server where you install Siebel Web Server Extension (SWSE) and on which you require these virtual directories. This process also updates the eapps.cfg file for the SWSE to add language-specific application sections. Perform this process only once so that multiple sections are not added to the file.

NOTE: Perform this process only if it is required for your installation case. For more information, see [“About Setting Up Siebel eService” on page 13](#).

This process is a step in [“Roadmap for Setting Up Siebel eService” on page 14](#).

Editing the new_virdirs Script

You edit the new_virdirs script to specify the virtual directory name that Siebel eService for Siebel Open UI (the Self Service Portal application) requires. The virtual directory name is also used for the application section in the eapps.cfg file. You can run an edited script on additional Web servers, as necessary.

This task is a step in [“Process of Adding the Virtual Directories for Siebel eService” on page 19](#).

To edit the new_virdirs script

1 Stop the Web server.

2 Back up the eapps.cfg file and the Web server configuration file, such as obj.conf, http.conf, magnus.conf, and so on.

3 Navigate to *SWSE_HOME/conf* g.

In this directory, *SWSE_HOME* is the SWSE installation location. (Use the backslash for Microsoft Windows; use the forward slash for UNIX or Linux.)

- 4 Back up the existing `new_virdirs` script as follows:
 - On Microsoft Windows, the name of the script is `new_virdirs.bat`.
 - On UNIX or Linux, the name of the script is `new_virdirs.sh`.
- 5 Using an appropriate text editor, such as Notepad on Microsoft Windows, open `new_virdirs.bat` or `new_virdirs.sh`.

NOTE: When you edit the script, do not enter any special characters, such as tabs.

- 6 Add the elements for the Self Service Portal application to an existing entry in this file as follows so the file creates a new virtual directory and new `eapps.cfg` file section for the application:

```
%JAVA_HOME%\j ava -j ar %ORACLE_HOME1%\confi g\new_vi rdi rs. j ar
{sal esm, servi cem, sservi ce} {Sal esmObj Mgr, Servi cemObj Mgr, SServi ceObj Mgr}
{epharmam, cgm} {ePharmaMObj Mgr, CGMObj Mgr} %LANG
```

In this entry, `sservi ce` is the name of the virtual directory and `SServi ceObj Mgr` is the name of the corresponding Application Object Manager, in each case without the corresponding language code. (The language-specific items are created when you run the script.)

- 7 Save the `new_virdirs` script.

Next, run the `new_virdirs` script to add the virtual directories for all specified languages. For more information, see ["Running the new_virdirs Script" on page 20](#).

Running the new_virdirs Script

You run the `new_virdirs` script to add the virtual directories for all specified languages that Siebel eService for Siebel Open UI (the Self Service Portal application) uses. Perform this task immediately after you perform the task to edit the `new_virdirs` script. For more information, see ["Editing the new_virdirs Script" on page 19](#).

NOTE: If running the `new_virdirs` script does not create the required virtual directories, then you must restore the files on the Web server from the backup files that you create in [Step 2 on page 19](#).

This task is a step in ["Process of Adding the Virtual Directories for Siebel eService" on page 19](#).

To run the new_virdirs script

- 1 Navigate to `$WSE_HOME/confi g`.
- 2 Open a command window or shell window and run a command as follows:

- On Microsoft Windows, run a command like the following command:

```
new_vi rdi rs. bat / languages
```

- On UNIX or Linux operating systems, run a command like the following command:

```
./new_vi rdi rs. sh / languages webserver/ locati on
```

In these commands, `languages` is a three-letter language code or a comma-separated list of language codes, and `webserver/location` is the installation location of the Web server instance.

For example, on Microsoft Windows, you might enter a command like the following command to create the virtual directories for U.S. English (ENU), French (FRA), and Japanese (JPN):

```
new_virtual_dirs.bat ENU, FRA, JPN
```

- 3 Specify the anonymous user for Siebel eService for Siebel Open UI by adding parameters like the following parameters to the eapps.cfg file:

```
AnonUserName = guestusername  
AnonPassword = guestuserpassword
```

Specify the anonymous user name and password in each language-specific application section, [sservice_*lang*].

NOTE: Add values similar to the values defined for other applications, such as Siebel eService for standard interactivity. In most cases, the AnonPassword value represents an encrypted value. To specify a different password, encrypt the password first by using the encryptstring utility. For more information, see *Siebel Security Guide*.

- 4 Restart the Web server.
- 5 Start a browser and start the Self Service Portal application by entering an appropriate URL, such as the following URL for French:

```
https://server_name/sservice_fra
```


4

Configuring Siebel eService

This chapter includes information about configuring the look and feel of the Siebel eService Web site. It includes the following topics:

- [About Configuring Siebel eService on page 23](#)
- [Configuring Siebel eService on page 23](#)
- [Configuration Tools for the Siebel eService Web Site on page 24](#)

About Configuring Siebel eService

You can use Siebel Tools to perform the following tasks to configure Siebel eService for your business model:

- Configure Siebel business components, applets, views, and all other objects of Siebel eService as needed. For example, set declarative properties or add Web scripts.
- Create new controls, applets, views, or Web pages as needed, and add charts to views, as needed.
- Associate applets, views, and Web pages with the appropriate Siebel 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 to a Web page (a Web page container).

In Siebel Tools, the application name for configuring Siebel eService is Siebel Service Portal. For more information, see *Configuring Siebel Open UI*.

Configuring Siebel eService

You can configure the look and feel of the Siebel eService Web site to incorporate the brand identity of your company. The Siebel eService Web site includes Siebel Web templates (SWT files) and controls (such as buttons and drop-down lists) that you can configure.

Configuring Siebel eService is a modular process that separates style and structure (cascading style sheets and Siebel Web templates) from the binding to data (HTML display objects). You can use Siebel Web templates to reuse style and structure across multiple HTML display objects to propagate style and structure changes across HTML display objects.

To configure Siebel eService

- 1 Identify the Web pages, views, applets, and other objects of Siebel eService that you want to change.
- 2 Using a text editor or an HTML authoring tool, change the Siebel Web templates (SWT files) as necessary to incorporate the appropriate company layout and formatting.
- 3 Using Siebel Tools, associate each applet with an Applet Web template, each view with a View Web template, and each Web page with a Page Container Web template.
- 4 Using Siebel Tools, configure the 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 information to detailed information.
 - Establish mapping between controls and list columns to the corresponding placeholders in the Applet Web templates.
- 5 Compile the repository changes into an SRF file.
- 6 Test and debug the configuration.

Configuration Tools for the Siebel eService Web Site

Siebel eService includes a set of Siebel Web templates and style sheets that determine the look and feel of the Siebel eService Web site. You change Siebel Web templates and style sheets by using a text editor or an HTML authoring tool. Additionally, a set of object definitions (controls) are grouped together according to object functions and object characteristics. You change Siebel object definitions (controls) by using Siebel Tools. For information about working with Siebel Web templates, cascading style sheets, and controls, see *Using Siebel Tools*.

The configuration tools for the Siebel eService Web site are as follows:

- **Page Container Web Template.** Displays persistent information, such as help, logout links, or a company logo. This template is `CCPageContainer_ss.swt`.
- The following templates apply to views:
 - **View Web Template.** Defines the layout of a view. This template is `CCViewContainer_Home_ss.swt`.
 - **View With Title Web Template.** Defines the layout of a view with a title. This template is `CCViewContainer_Home_With_Title_ss.swt`.View templates dictate how the applets are mapped or placed.
- **Applet Web Template.** Defines the layout of an applet. This template is `CCAppletFormGridLayout_ss.swt`.
Applet templates dictate how the controls and fields are mapped or placed.
- The following templates apply to form applets:

- **Applet Form Section Template.** Defines the layout of a form applet. This template is CCAppletFormSection_ss.swt.
- **Detail Applet Web Template.** Defines the layout of a detailed form applet. This template is CCAppletFormDetailLayout_ss.swt.
- **Form Applet With Two Columns Applet Web Template.** Defines the layout of a form applet with two columns. This template is CCAppletForm2Col_ss.swt.
- The following templates apply to tile applets:
 - **Tile List Applet Web Template.** Defines the layout of a tile list applet. This template is CCAppletList_Tile_ss.swt.
 - **Attachment Tile Applet Web Template.** Defines the layout of an attachment tile applet. This template is CCAppletList_Tile_SRAttachments_ss.swt.
- The following templates apply to other applets:
 - **Social Media Applet Web Template.** Defines the layout of a social media applet. This template is CCAppletList_SocialMediaLinks_ss.swt.
 - **Banner Applet Web Template.** Defines the layout of a banner applet. This template is CCAppletList_Tile_NewScroll_ss.swt.
 - **How Can We Help Applet Web Template.** Defines the layout of a how-can-we-help applet. This template is CCAppletList_Tile_NavLink_ss.swt.
- **Cascading Style Sheets.** Determine the color schemes and other styles in the Siebel Web templates. You can change the rules-defined style sheet to configure the appearance of the Siebel eService Web site. For more information about using cascading style sheets to configure the appearance of the Siebel eService Web site, see *Configuring Siebel Open UI*.
- **Controls.** Determine how customers interact with the Siebel eService Web site. A control is functionality in the applet that usually shows data from a field in the business component or invokes programming logic. One control that is set up in Siebel Tools corresponds to one data control in an applet, such as a text box, check box, or command button.

5

Administering Siebel eService

This chapter includes information about administering and setting up the functionality that customers can access on the Siebel eService Web site. It includes the following topics:

- [About Administering Siebel eService on page 27](#)
- [About the Security Framework for Siebel eService on page 27](#)
- [About Email Notifications on page 30](#)
- [Administering Navigation Links on page 30](#)
- [Process of Administering Web Access on page 32](#)
- [Process of Administering Service Requests on page 34](#)
- [Process of Setting Up Email Notifications on page 37](#)
- [Setting Up Company Contact Information on page 40](#)
- [Process of Setting Up Branch Locations on page 41](#)

About Administering Siebel eService

After configuring Siebel eService, you complete the procedures in this chapter to set up the functionality that customers can access on the Siebel eService Web site. Unless noted otherwise, you use Siebel Call Center to complete these procedures. After you set up or change information in Siebel Call Center, customers with appropriate access can automatically see the information on the Siebel eService Web site.

NOTE: The procedures in this guide assume that you do not use left-hand navigation. However, you can set up left-hand navigation. For more information about left-hand navigation and about implementing it, see *Siebel Fundamentals for Siebel Open UI*.

About the Security Framework for Siebel eService

To establish a secured application security framework, you determine the application functionality and data content that apply to public access and the application functionality and data content that apply to registered customers. To protect privacy and avoid conflicts, you must authenticate registered customers and control the data and application functionality each authenticated customer can access. For more information, see [“About Authentication for Siebel eService” on page 28](#) and [“Access Control for Siebel eService” on page 29](#).

You typically consider the following issues when you set up a security framework:

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

About Authentication for Siebel eService

The customer management and authentication processes control access for the following customers:

- **Anonymous customers.** Customers who do not register on the Siebel eService Web site can view only certain sections of the Web site, such as the company contact information. These customers can register, create their profiles, and gain access to additional functionality on the Web site. They can also obtain user names and passwords from customer service representatives.
- **Registered customers.** Customers who register on the Siebel eService Web site have their user names and passwords authenticated in subsequent visits. After they log in to the Web site, they have access to views appropriate to the responsibilities that an application administrator assigns to them. For example, they can create service requests.

An application administrator or customer service representative can perform the following tasks for customers:

- Create records for customer profiles.
- Add or change user names and passwords for customer profiles.
- Change information in customer profiles, such as postal addresses, email addresses, and telephone numbers.

A Web-delegated customer administrator is a designated administrator at a customer company in a business-to-business situation. These administrators are assigned a Siebel responsibility that allows them to add or change customer information for the account. This Siebel responsibility gives them access to the Web Channel Users view of the Administration - User screen in Siebel Call Center where they can work with customer information.

User names and passwords are typically stored in an external authentication directory, such as Netscape LDAP Directory Server or Microsoft Active Directory Server. The Siebel security adapter interface and the appropriate LDAP parameter settings support the integration between Siebel eService and an external authentication directory. With this support, the directory authenticates registered customers, and then the customers are authorized to access the Siebel eService Web site. For more information about customer management and authentication support, see *Siebel Security Guide*.

Access Control for Siebel eService

Table 3 shows the mechanisms you can use to control customer access to data.

Table 3. Access Control Mechanisms

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

To control user access to data, you complete the following tasks:

- Create customer lists.
- Create access groups.
- Assign the appropriate customer lists to the access groups.
- Create catalogs and the categories for those catalogs.
- Associate the data with the catalog categories.
- Assign access groups to the appropriate categories.

For more information about access control, see *Siebel Security Guide* and *Siebel eSales Administration Guide*.

About Data Privacy for Siebel eService

Data privacy supports communication and data transfer through the Internet. By using the Internet SSL and encryption technology, Siebel applications can support a secured communication protocol. This technology also allows for the necessary protection of your transmitted data from a possible security breach, such as network spooling. For more information about Internet security for Siebel applications, see *Siebel Security Guide*.

About Email Notifications

Email notifications alert customers about important information. For example, you can send email notification to alert a customer when the status of an open service request changes or when a customer service representative associates a solution with the service request. Also for example, you can escalate a service request that is outstanding for longer than a week by sending an email notification to the manager of a call center.

NOTE: Email notifications are not included in the preconfigured Siebel eService application, but you can implement this feature. For more information, see [“Process of Setting Up Email Notifications” on page 37](#).

You use Siebel Workflow to define the business rules that automate business processes and procedures. Siebel eService provides the following sample workflow policies that send email notifications to customers:

- **eService Activity Policy.** Sends an email when an activity is added to a service request.
- **eService Attachment Policy.** Sends an email when a file attachment is added to a service request.
- **eService Registration Request Policy.** Sends an email containing the user ID and password.
- **eService Service Request Update Policy.** Sends an email when the status of a service request is updated.

You might have to change the workflow policy conditions for your business model. You must also enable Email Manager for these email notifications. For information about Email Manager, see *Siebel Business Process Framework: Workflow Guide*.

Administering Navigation Links

Customers can use navigation links on the Siebel eService Web site to access specific site content, such as service requests, branch information, and contact information. A group of navigation links can appear as a carousel on the Siebel eService Web site. Also, a navigation link can designate the content in the banner on the home page or a gateway to an external Web site. An external Web site might be a social media Web site, such as the Web site for Facebook.

You can configure the navigation links that are available to customers, the images that are associated with these links, the behavior of these links when customers click them, the display names of these links, and the locations on the Siebel eService Web site where these links appear.

To administer navigation links

- 1 Navigate to the Administration - Application screen, then the Navigation Links view.

- In the Navigation Links list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Navigation Link Name	Type the name of the navigation link. This link, but not this link name, appears on the Siebel eService Web site.
Image Source	Type the relative path to the image file for the navigation link on the Web server, or type the path to the external Web site that contains the image file for the navigation link. The Web server must be able to access this file. For example, if you want to type the relative path to the image file in the Images directory, then this field value uses the following format: images/filename (for example, images/LocateBranch.png).
Action	Select the action that occurs when customers click the navigation link. Values for this field follow: <ul style="list-style-type: none"> ■ View Drilldown. For this value, the view that is designated in the View Name field appears when customers click the navigation link. ■ Goto URL. For this value, the external Web site that is designated in the View Name field appears when customers click the navigation link. ■ Invoke Task. For this value, the task that is designated in the Task Name field starts when customers click the navigation link.
Task Name	Select the name of the task that starts when customers click the navigation link. This field applies only if you select a value of Invoke Task in the Action field.
View Name	Select the name of the view that appears when customers click the navigation link. This field applies only if you select a value of View Drilldown in the Action field.
URL	Type the path for the external Web site that appears when customers click the navigation link. This field applies only if you select a value of View Goto URL in the Action field.
Display Name	Type the display name for the navigation link name. This link name appears on the Siebel eService Web site.
Activate	Select this check box to show the navigation link on the Siebel eService Web site. Clear this check box to hide the navigation link on the Siebel eService Web site.

- In the Applets list, add a record for each applet on the Siebel eService Web site in which you want the navigation link to appear.

For example, to create a navigation link in the banner on the home page, select News Scroll List Applet (CX sService).

- If you want to show the display name for the navigation link in a different language, then add a record for the display name in the appropriate language in the Translations list.

Process of Administering Web Access

To administer Web access, perform the following tasks:

- 1 "Activating the Workflow for Email Password Button" on page 32
- 2 "Registering Customers" on page 32
- 3 "Reassigning Passwords" on page 33

NOTE: Web access administration in Siebel Call Center is not included in the preconfigured Siebel eService application, but you can implement this feature.

Activating the Workflow for Email Password Button

The Email Password button automatically generates a random password for a customer and sends an email containing that password to the customer. This button functions only if you activate the Contact Password Reset workflow. For more information about workflows, see *Siebel Business Process Framework: Workflow Guide*.

NOTE: In addition to activating the workflow, you must enable the Communications Management component group and create the email profile that is used to send the email.

This task is a step in "Process of Administering Web Access" on page 32.

To activate the workflow for the Email Password button

- 1 Navigate to the Administration - Business Process screen, Workflow Deployment, and then the Active Processes view.
- 2 In the Active Workflow Processes list, query for the Contact Password Reset workflow.
If the workflow is not returned, then it is not yet activated.
- 3 If the workflow is not yet activated, then complete the following steps:
 - a Scroll up to the Repository Workflow Processes list.
 - b Select the workflow from the list, and click Activate.
- 4 Stop and restart the Siebel Server.

Registering Customers

Customer service representatives can register customers in the Web Access form. For more information about customer administration, see *Siebel eSales Administration Guide*.

When customers perform self registration, they can select a user name, a password, and a challenge question. The challenge question confirms the customer's identity when the customer forgets a password.

This task is a step in "Process of Administering Web Access" on page 32.

To register a customer

- 1 Navigate to the Contacts screen, then the Contacts List view.
- 2 In the Contacts list, add a record, and complete the necessary fields.
- 3 Drill down on the Last Name field for the customer record.
- 4 Click the Web Access view tab.
- 5 In the Web Access form, complete the necessary fields.

Some fields are described in the following table.

Field	Comments
User ID	Type the ID for the customer.
Responsibility	Select a value of Web Registered User. Responsibilities determine the views that a customer is allowed to access. Application administrators determine the available values in this field. For these values, the Web Access field is selected in the Responsibilities view of the Administration - Application screen. For more information, see <i>Siebel Security Guide</i> .
User Type	Select a value of Web Registered User.
Challenge Question	Type a question for which only the customer knows the answer.
Answer to Challenge Question	Type the answer to the challenge question.

- 6 To automatically generate a random password and send an email containing that password to the customer, click Email Password.

You do not see random passwords that are automatically generated. For more information, see ["Activating the Workflow for Email Password Button" on page 32](#).

Reassigning Passwords

When customers forget their passwords, customer service representatives can use the Web Access form to verify their identities and reassign new passwords. They can automatically generate a random password and send an email containing that password to the customer.

This task is a step in ["Process of Administering Web Access" on page 32](#).

To reassign a password

- 1 Navigate to the Contacts screen, then the Contacts List view.
- 2 In the Contacts list, drill down on the Last Name field for the customer record.
- 3 Click the Web Access view tab.
- 4 In the Web Access form, complete the following steps:

- a If necessary, verify the customer's identity by asking the question in the Challenge Question field.
- b To automatically generate a random password and send an email containing that password to the customer, click Email Password.

Process of Administering Service Requests

To administer service requests, complete the following tasks:

- 1 ["Adding Updates to Service Requests" on page 34](#)
- 2 ["Creating Solutions" on page 35](#)
- 3 ["Associating Solutions with Service Requests" on page 35](#)
- 4 ["Associating Attachments with Service Requests" on page 36](#)

Adding Updates to Service Requests

Customer service representatives might want to add an update to a service request to ask the customer for more information about the issue or to notify the customer that they are currently investigating the issue. To add an update to a service request, you associate with the service request an activity that describes the nature of the update. Customers who can access that service request can view the activity record under the Updates heading of the service request on the Siebel eService Web site.

This task is a step in [Process of Administering Service Requests on page 34](#).

To add an update to a service request

- 1 Navigate to the Service Requests screen, then the Service Request List view.
- 2 In the Service Requests list, drill down on the SR number (#) field for the service request to which you want to add an update.
- 3 Click the Activities view tab.
- 4 In the Activities list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Description	Type the description of the update to the service request.
Type	Select a value to categorize the nature of the update. Applicable values include Information Needed and Web Update.
Start	Displays the starting date and time for the activity. This field does not affect the update to the service request on the Siebel eService Web site.

Field	Comments
Due	Displays the ending date and time for the activity. This field does not affect the update to the service request on the Siebel eService Web site.
Status	Displays the status of the activity. This field does not affect the update to the service request on the Siebel eService Web site.

Creating Solutions

Before you can associate solutions with service requests, you must create the solution records.

This task is a step in [Process of Administering Service Requests on page 34](#).

To create a solution

- 1 Navigate to the Administration - Solution screen, then the Solutions view.
- 2 In the Solutions list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Name	Type the name of the solution. The customer does not see this name.
Description	Type the description of the solution. This field has a text limit of 2 kilobytes.
Status	Select a value for the status of the solution.
Type	Select a value of Solution in this field.
Publish Internal	Select this check box to designate that people within your company can view the solution.
Publish External	Select this check box to designate that people who access the Siebel eService Web site can view the solution.

Associating Solutions with Service Requests

When you associate solutions with service requests, customers who can access those service requests can view the solution records under the Solutions heading of the service requests on the Siebel eService Web site.

This task is a step in [Process of Administering Service Requests on page 34](#).

To associate a solution with a service request

- 1 Navigate to the Service Requests screen, then the Service Request List view.

- 2 In the Service Requests list, drill down on the SR number (#) field for the service request to associate with a solution.
- 3 Click the Solutions view tab.
- 4 In the Solutions list, add a record, and complete the necessary fields.
Some fields are described in the following table.

Field	Comments
Name	Displays the name of the solution that you select in the Add Solutions dialog box.
Description	Displays the description for the solution that you select in the Add Solutions dialog box.
Comments	Type additional comments relevant to the solution.

Associating Attachments with Service Requests

When you associate attachments with service requests, customers who can access those service requests can view the attachments under the Attachments heading of the service requests on the Siebel eService Web site.

This task is a step in [Process of Administering Service Requests on page 34](#).

To associate an attachment with a service request

- 1 Navigate to the Service Requests screen, then the Service Request List view.
- 2 In the Service Requests list, drill down on the SR number (#) field for the service request to associate with an attachment.
- 3 Click the Attachments view tab.
- 4 In the Attachments list, add a record as follows:
 - a To add a file, click New File, and navigate to and select a file in the dialog box that appears.
 - b To add a URL, click New URL, and designate the URL in the dialog box that appears.
- 5 Complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Attachment Name	Displays the name of the file that you select or the URL that you designate. You can select a different file or URL in the Add Attachment dialog box for this field. Files can be HTML files, PDF files, executable files, and dynamic link library files.
Comments	Type additional comments relevant to the attachment.

Process of Setting Up Email Notifications

To set up email notifications, perform the following tasks:

- 1 ["Enabling Component Groups and Policies for Email Notifications" on page 37](#)
- 2 ["Designating Customers for Email Notifications" on page 38](#)
- 3 ["Changing Parameters for Generate Triggers Component" on page 38](#)
- 4 ["Starting the Task for Generate Triggers Component" on page 38](#)
- 5 ["Changing Parameters for Workflow Monitor Agent Component" on page 39](#)
- 6 ["Starting the Task for Workflow Monitor Agent Component" on page 39](#)

Enabling Component Groups and Policies for Email Notifications

To set up email notifications, you first enable the component groups and policies for email notifications.

This task is a step in ["Process of Setting Up Email Notifications" on page 37](#).

To enable the component groups and policies for email notifications

- 1 Navigate to the Administration - Server Configuration screen, then the Enterprises view, and complete the following steps:
 - a Click the Component Groups view tab.
 - b In the Component Groups list, make sure the following component groups are enabled:
 - ❑ Communications Management
 - ❑ Workflow Management
 - c Stop and restart the Siebel Server.

Siebel Workflow Manager now actively monitors the workflow policies that are online and performs the appropriate actions. Siebel Communication Manager, which interfaces with the SMTP mail server, executes the actual step for sending the email notification.
- 2 Navigate to the Administration - Business Process screen, then the Workflow Policy Group view, and complete the following steps:
 - a In the Policy Groups list, select the eService Group record.
 - b In the Policies list, verify the following information for each record:
 - ❑ The Activation field that is blank or contains a value that is not later than the date and time of testing.
 - ❑ The Expiration field that is blank or contains a date and time that has not already passed.

Designating Customers for Email Notifications

After you enable the component groups and policies, you designate the customers who receive email notifications.

This task is a step in [“Process of Setting Up Email Notifications” on page 37](#).

To designate a customer for email notifications

- 1 Navigate to the Contacts screen, then the Contacts List view.
- 2 For the customer record, make sure the value in the Email field is the correct email address for the customer.
- 3 Drill down on the Last Name field for the customer record.
- 4 Click the More Info view tab.
- 5 Select the Send Email Updates check box in the form.

Changing Parameters for Generate Triggers Component

The Generate Triggers component creates triggers for the email notifications. You must change the parameters for this component.

This task is a step in [“Process of Setting Up Email Notifications” on page 37](#).

To change the parameters the Generate Triggers component

- 1 Navigate to the Administration - Server Configuration screen, Servers, and then the Components view.
- 2 In the Components list, find and select the Generate Triggers component.
- 3 Click the Component Parameters view tab.
- 4 In the Component Parameters list, change the EXEC parameter value to TRUE.

Starting the Task for Generate Triggers Component

After you change the parameters for the Generate Triggers component, you log into Server Manager and start the task for this component. Wait until this task is complete before changing the parameters for the Workflow Monitor Agent component.

This task is a step in [“Process of Setting Up Email Notifications” on page 37](#).

To start the task for the Generate Triggers component

- 1 From the command prompt, log in to Server Manager as follows:

```
srvrmgr /e enterprise name /g gateway server name /u database user name /p db passwd
```

- 2 Start the task for the Generate Triggers component by using the following command:


```
srvrmgr> start task for comp GenTrig with Exec="TRUE", pri vuser="Tableowner_name",
pri vuserpass="Table_password"
```

where:

 - *Tableowner_name* is the database table owner name.
 - *Table_password* is the database table password.

For more information, see *Siebel Business Process Framework: Workflow Guide*.
- 3 In Server Manager, type the following text:


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

Changing Parameters for Workflow Monitor Agent Component

You must change the parameters for the Workflow Monitor Agent component.

This task is a step in ["Process of Setting Up Email Notifications" on page 37](#).

To change the parameters for the Workflow Monitor Agent component

- 1 Navigate to the Administration - Server Configuration screen, Servers, and then the Components view.
- 2 In the Components list, find and select the Workflow Monitor Agent component.
- 3 Click the Component Parameters view tab.
- 4 In the Component Parameters list, change the following parameter values:
 - Action interval to 1
 - Group Name to eService Group
 - Use Action Agent to FALSE

Starting the Task for Workflow Monitor Agent Component

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

If you want to designate additional email customers for email notifications after you complete all of the steps for setting up email notifications, then you do not have to start the task for the Generate Triggers component or the task for the Workflow Monitor Agent component. You can designate the customers. For more information, see ["Designating Customers for Email Notifications" on page 38](#).

This task is a step in ["Process of Setting Up Email Notifications" on page 37](#).

To start the task for the Workflow Monitor Agent component

- 1 From the command prompt, log in to Server Manager as follows:

```
srvrmgr /e enterprise name /g gateway server name /u database user name /p db passwd
```
- 2 Start the task for the Workflow Monitor Agent component by using the following command for the DB2UDB database:

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

For Oracle, use `tableownpass='table owner's name'`. For MS Sql, use `tableownpass='MSSQL'`.
- 3 In Server Manager, type the following text:

```
srvrmgr> list task for comp WorkMon
```
- 4 Log out of Server Manager.

Setting Up Company Contact Information

You can set up accounts for email, fax numbers, postal mail, and telephone numbers so that customers using the Siebel eService Web site can contact you by using these communication methods. Each account that you set up can appear as a tile in the Contact Us view of the Siebel eService Web site. Customers can submit email messages by completing a form in this Contact Us view. The contents of the form are converted into an email message and routed to an email address in your email application. Also, customers can view the fax numbers, postal addresses, and telephone numbers for your company.

You must enable the Communications Management component group to process inbound email. This component group is started with the Siebel Server process to process inbound email. You can verify a successful email submission in Siebel Call Center by checking the logged event for this task in the Administration - Server Management screen. For more information, see *Siebel CTI Administration Guide*.

Siebel Communications Server processes inbound and outbound communication messages for the Siebel application. Siebel eService uses Siebel Communications Server to process the inbound structured email forms that customers submit. For more information, see *Siebel CTI Administration Guide*.

To set up company contact information

- 1 Navigate to the Administration - Application screen, then the Contact Us view.

- 2 In the Email, Fax and Mail Accounts list, add a record, and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Account Type	Displays a value of Contact Us.
Address	Select the address for the account. When you click the select button for this field, the Company Addresses dialog box appears. You can select multiple addresses, but only one address can be the primary address for the account. In the dialog box, you can also create a new address record. When select or create an address record, the other fields in the Email, Fax and Mail Accounts list are populated with the data from that record. If an existing record in the Company Addresses dialog box has no values or incorrect values in the fields for the email address, phone number, or fax number, then you can change the values for these fields in the dialog box.
Email	Displays the email address for the address that you select or create in the Company Address dialog box.
Phone #	Displays the telephone number for the address that you select or create in the Company Addresses dialog box.
Fax #	Displays the fax number for the address that you select or create in the Company Addresses dialog box.

- 3 Click the Email Subjects view tab.
4 Add an email subject record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Name	Type a name for the subject record.
Subject	Type the text for the subject record. Enter at least one subject for each account with an email address. You can create multiple subjects for an account with an email address.

Process of Setting Up Branch Locations

Customers can identify the branches of a company that are nearest to a specified location. They can visit these branches to conduct face-to-face business transactions.

Customers can perform branch location searches by using a city, state, or ZIP code query. In the results of the search, the branches appear in order of proximity, along with relevant information, such as location names, addresses, operating hours, telephone numbers, and distances from a location.

To set up branch locations, perform the following tasks:

- 1 "Importing Geocode Data" on page 42
- 2 "Creating Divisions for Branch Locations" on page 43
- 3 "Creating Categories for Branch Locations" on page 43
- 4 "Creating Branch Locations" on page 44
- 5 "Linking Search Results to Map Services" on page 45

Importing Geocode Data

The geocode data includes location references. You can import Geocode data in one of the following ways:

- Using the Import command in Siebel Call Center.
- Using Siebel Enterprise Integration Manager. For information about importing data with Siebel Enterprise Integration Manager, see *Siebel Enterprise Integration Manager Administration Guide*.

The imported geocode data is stored in the (S_ZIPCODE) database table. [Table 4](#) shows the columns in this database table that must have data.

Table 4. Data Model for S_ZIPCODE Table

Column	Description
ZIP Code	Postal code in alphanumeric text.
City	Name of city.
State	Name of state or province. This field can be blank for certain countries.
Country	Name of the country.
Latitude	Latitude number (0 to plus or minus 90). A plus sign (+) denotes the Northern Hemisphere, and a minus sign (-) denotes the Southern Hemisphere.
Longitude	Longitude number (0 to plus or minus 180). A plus sign (+) denotes the Eastern Hemisphere, and a minus sign (-) denotes the Western Hemisphere).

You can import a maximum of 2,000 geocode data records for each Import command on Siebel Call Center. You must store the geocode data in a file that contains the column heading information in [Table 4](#).

NOTE: Oracle provides no guarantees or warranties about the accuracy of the geocode data for branch locations. For the latest geocode data, contact a geocode data vendor.

This task is a step in "Process of Setting Up Branch Locations" on page 41.

To import geocode data with the Import command

- 1 Navigate to the Administration - Data screen, then the ZIP Code Administration view.

- 2 In the ZIP Geocodes list, click the menu button, and then select Import.
The Import dialog box appears.
- 3 In the Import dialog box, complete the following steps:
 - a Click Choose File to select a file in the Input File field.
This file is the geocode data file.
 - b For the Input Format field, select Comma Separated Text File or Tab Delimited Text File for the geocode data file.
 - c For the Input Source field, select Auto Mapping.
 - d For the Conflict Resolution field, select Overwrite Existing Record.
 - e Click Next.
- 4 Make sure the values for the import fields match the values for the Siebel fields, and click Next.
A view log appears when the import process is complete.

Creating Divisions for Branch Locations

Before you create branch locations, create the divisions for branch locations.

This task is a step in [“Process of Setting Up Branch Locations” on page 41](#).

To create a division for a branch location

- 1 Navigate to the Administration - Group screen, then the Internal Divisions view.
- 2 In the Divisions list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Organization Flag	Select this check box if the division is associated with an organization.
Partner Flag	Displays a check in the check box if the organization is a channel partner. You select the check box in the Partner Flag field for the organization in the Organizations view of the Administration - Group screen to indicate that the organization is a channel partner.

Creating Categories for Branch Locations

Before you create branch locations, create the categories for the branch locations.

This task is a step in [“Process of Setting Up Branch Locations” on page 41](#).

To create a category for a branch location

- 1 Navigate to the Administration - Data screen, then the List of Values view.
- 2 In the List of Values list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Type	Select a value of BUSINESS_CATEGORY. This field designates the category type for the branch locations.
Displayed Value	Type the name of category value that the customers see.
Language Independent Code	Type the language independent field value that is used to search for the category. For example, in the Spanish version of Siebel eService, you might see Oficinas de Ventas for the Displayed Value field, but the Language Independent Code value is Sales Offices.

Creating Branch Locations

You can create searchable branch locations.

This task is a step in ["Process of Setting Up Branch Locations"](#) on page 41.

To create a branch location

- 1 Navigate to the Administration - Application screen, then the Branch Locator view.
- 2 In the Branch Locations list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Branch	Type the name that you want the customer to see in the results view.
Category	Select the category for the branch location. For more information, see "Creating Categories for Branch Locations" on page 43.
Longitude	Type the longitude for the branch. If you do not enter a value, then the longitude value from the S_ZIPCODE table for the value in the ZIP Code field is used.
Latitude	Type the latitude for the branch. If you do not enter a value, then the latitude value from the S_ZIPCODE table for the value in the ZIP Code field is used.
Division	Select an existing internal division or channel partner. For more information, see "Creating Divisions for Branch Locations" on page 43.
Address	Select the address for the branch.

Linking Search Results to Map Services

In the preconfigured Siebel eService application, search results for branch locations are not linked to map services. Application administrators can link search results for branch locations to map services so that customers can view applicable directions and a map from an online map service provider. Some map service providers follow:

- **Google Maps™**. You can link to the map service in Google Maps. You must comply with the terms of the service agreement when using the services of Google Maps.
- **MapQuest®**. LinkFree is a free service of MapQuest that allows you to link directly to the MapQuest Web site so that customers can view maps for any address. The Mapquest map service page is automatically loaded for branch locations. Customers must submit a brief registration form to Mapquest to make the link available on their Web sites. For information about legal terms, contact Mapquest.
- **Yahoo!®** You can link to the directions and map service in Yahoo! You must comply with the terms of the service agreement when using the services of Yahoo!

To link search results for branch locations to a 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 URL call of the service provider. Review the latest URL syntax of the map provider. For information about Siebel Tools, see *Using Siebel Tools*.

This task is a step in [“Process of Setting Up Branch Locations” on page 41](#).

A

Workflows for Siebel eService

This appendix includes information about the workflows for Siebel eService. It includes the following topics:

- [User Registration Initial Process Workflow on page 47](#)
- [User Registration Process OUI Workflow on page 49](#)
- [User Registration SubProcess OUI Workflow on page 50](#)
- [User Registration Forgot Password \(CX eService\) Workflow on page 52](#)

NOTE: If you cannot see all of the detail in some of the larger workflow diagrams in this chapter, then you can view these workflows in Siebel Tools to see a clearer image.

User Registration Initial Process Workflow

This workflow calls other workflows that complete the registration process for a customer. [Figure 1](#) shows this workflow.

NOTE: If you cannot see all of the detail in this workflow diagram, then you can view this workflow in Siebel Tools to see a clearer image.

A customer calls this workflow by clicking the New User link or the Forgot Password link in the Account Login form that appears when the customer clicks the Login link on the home page of the Siebel eService Web site.

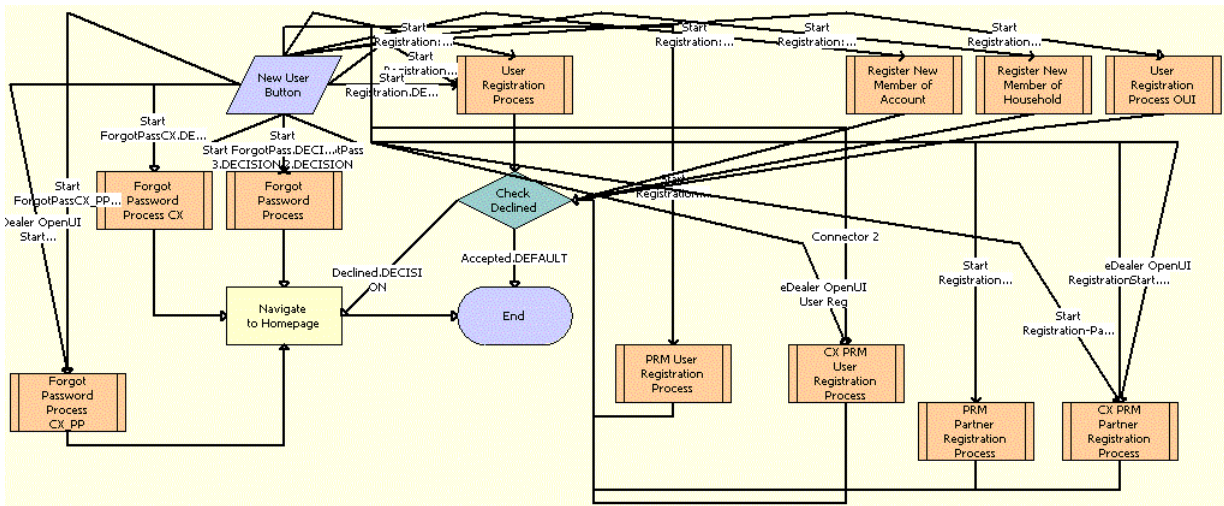


Figure 1. Registration Initial Process Workflow

NOTE: This workflow includes steps that apply to customer registration on Web sites other than the Siebel eService Web site for Siebel Open UI, such as the partner portal Web site. Because this guide documents the functionality for Siebel eService for Siebel Open UI, only the workflow steps that apply to the Siebel eService Web site for Siebel Open UI are included in the workflow description.

Workflow Description. This workflow performs the following actions:

- 1 **User Registration Process OUI.** This step calls the User Registration Process OUI workflow if the customer clicks the New User link in the Account Login form of the Siebel eService Web site. For more information, see [“User Registration Process OUI Workflow” on page 49.](#)
- 2 **Check Declined.** This step determines whether the customer’s registration is accepted or declined during the registration process. If the customer’s registration is accepted, then the workflow terminates.
- 3 **Forgot Password Process CX.** This step calls the User Registration Forgot Password (CX eService) workflow if the customer clicks the Forgot Password link in the Account Login form of the Siebel eService Web site. For more information, see [“User Registration Forgot Password \(CX eService\) Workflow” on page 52.](#)
- 4 **Navigate to Homepage.** This step navigates to the home page of the Siebel eService Web site if the customer’s registration is declined during the registration process or if the customer’s password assignment is complete.

User Registration Process OUI Workflow

This workflow calls another workflow to complete the registration process if the security setup for the customer is valid. [Figure 2](#) shows this workflow.

The User Registration Initial Process workflow calls this workflow as a subprocess.

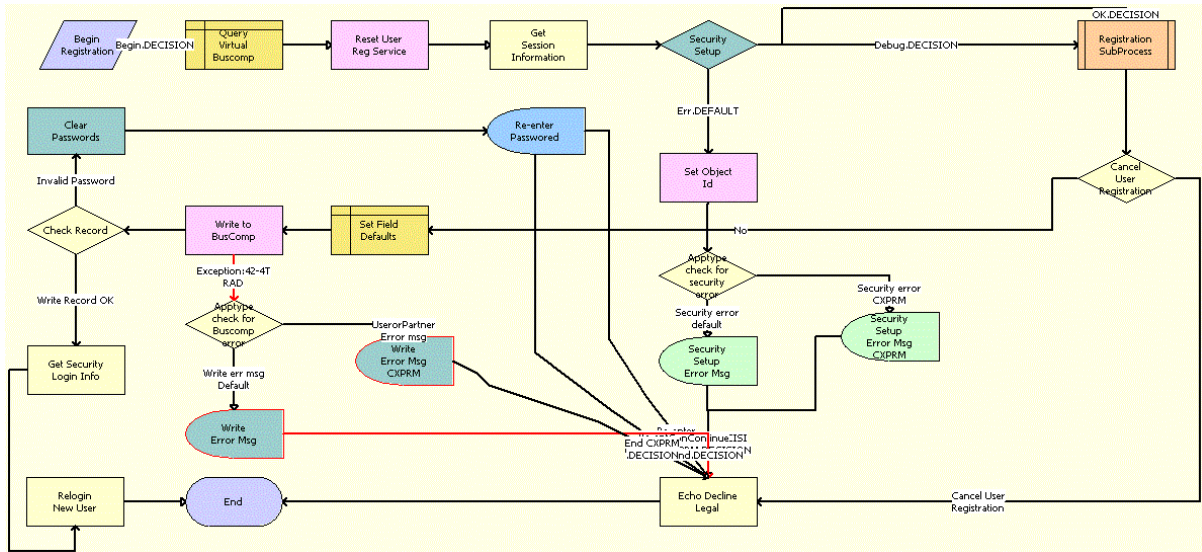


Figure 2. User Registration Process OUI Workflow

NOTE: This workflow includes steps that apply to customer registration on Web sites other than the Siebel eService Web site for Siebel Open UI, such as the partner portal Web site. Because this guide documents the functionality for Siebel eService for Siebel Open UI, only the workflow steps that apply to the Siebel eService Web site for Siebel Open UI are included in the workflow description.

Workflow Description. This workflow performs the following actions:

- 1 Query Virtual Buscomp.** This step queries the User Registration virtual business component and retrieves the active record.
- 2 Reset User Reg Service.** This step uses a method to prepare the User Registration service and User Registration business component for use. This step works with the User Registration virtual business component to clear all previous data and reset maps for multi-value groups.
- 3 Get Session Information.** This step retrieves the application name and home page view name of the customer's session.
- 4 Security Setup.** This step determines whether the security setup for the customer is valid.
- 5 Set Object Id.** This step sets the object ID if the security setup for the customer is invalid.
- 6 Apptype check for security error.** This step checks for a security error for the type of Web site the customer uses to register.

- 7 Security Setup Error Msg.** This step displays an error message if the security setup for the customer is invalid.
- 8 Registration SubProcess OUI.** This step calls the User Registration SubProcess OUI workflow to complete the registration process if the security setup for the customer is valid. For more information, see [“User Registration SubProcess OUI Workflow” on page 50](#).
- 9 Cancel User Registration.** This step uses the output from [Step 8](#) to determine whether the registration must be cancelled.
- 10 Echo Decline Legal.** This step sets the value of an output property to indicate that the registration is declined.
- 11 Set Field Defaults.** This step updates the User Registration virtual business component to add a value for the application name.
- 12 Write to BusComp.** This step copies user information from the User Registration virtual business component to the User Registration business component and writes the record.
- 13 Apptype check for Buscomp error.** This step checks for a business component error for the type of Web site the customer uses to register.
- 14 Write Error Msg.** This step displays an error message if [Step 12](#) results in an error.
- 15 Check Record.** This step determines whether the customer registration contains an invalid password
- 16 Clear Passwords.** This step clears the password field if the customer registration contains an invalid password.
- 17 Re-enter Password.** This step displays a message to the customer about entering data in the password field again.
- 18 Get Security Login Info.** This step retrieves the security login information if the customer registration contains a valid password.
- 19 Relogin New User.** This step logs in the customer to the Siebel eService Web site.

User Registration SubProcess OUI Workflow

The workflow retrieves and validates the registration data of a customer during the registration process. [Figure 3](#) shows this workflow.

The User Registration Process OUI workflow calls this workflow as a subprocess.

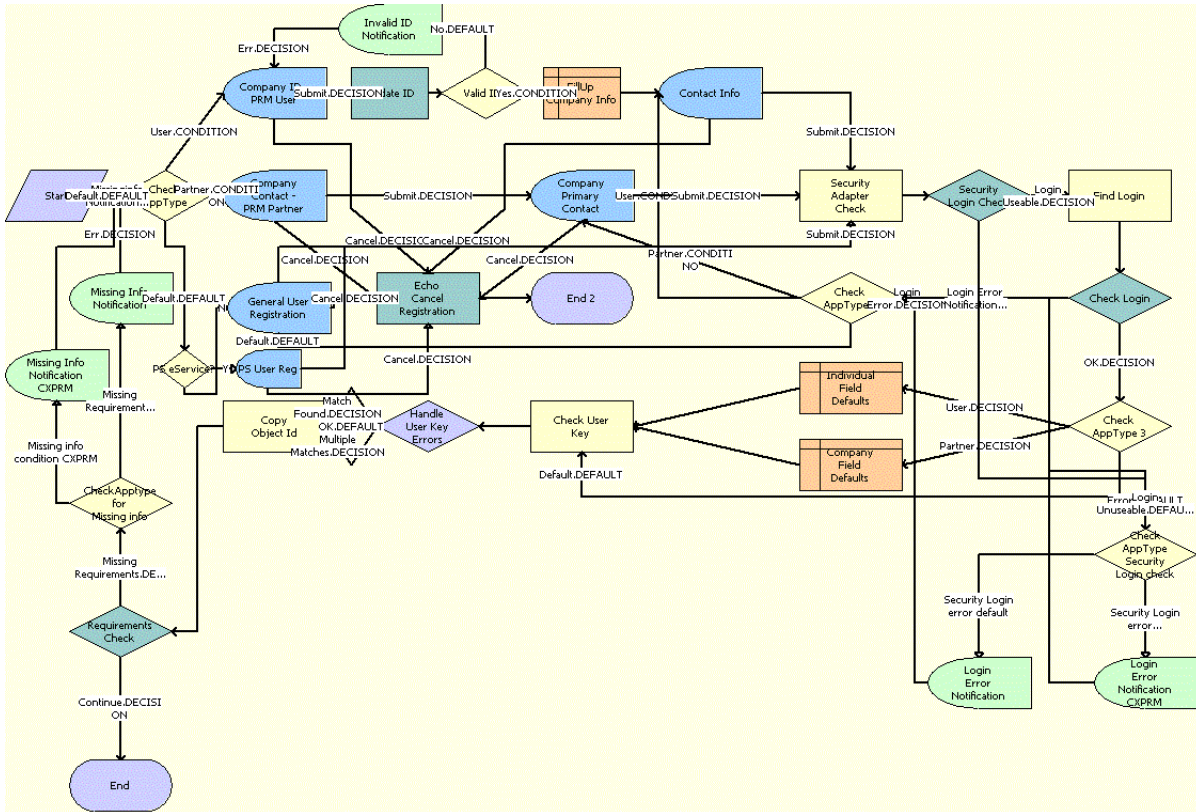


Figure 3. User Registration SubProcess OUI Workflow

NOTE: This workflow includes steps that apply to customer registration on Web sites other than the Siebel eService Web site for Siebel Open UI, such as the partner portal Web site. Because this guide documents the functionality for Siebel eService for Siebel Open UI, only the workflow steps that apply to the Siebel eService Web site for Siebel Open UI are included in the workflow description.

Workflow Description. This workflow performs the following actions:

- 1 **Check AppType.** This step determines the type of Web site the customer uses to register.
- 2 **PS eService?** This step determines whether the type of Web site is the Public Sector eService Web site for Siebel Open UI.
- 3 **General User Registration.** This step displays the appropriate registration form for the customer if the Web site is not the Public Sector eService Web site for Siebel Open UI.
- 4 **Echo Cancel Registration.** This step cancels the registration process when the customer clicks the Cancel button on the registration form.
- 5 **Security Adapter Check.** This step queries the security adapter for the customer's login when the customer clicks the Register button on the registration form.

- 6 Security Login Check.** This step determines whether the customer's login already exists in the security adapter.
- 7 Check AppType Security Login check.** This step checks for a security login error for the type of Web site the customer uses to register if the customer login already exists in the security adapter or the Siebel database.
- 8 Login Error Notification.** This step displays an error message if the security login already exists in the security adapter or the Siebel database.
- 9 Find Login.** This step queries the Contact table for the customer's login if the customer's login does not already exist in the security adapter.
- 10 Check Login.** This step determines whether customer's login already exists in the Siebel database.
- 11 Check AppType 2.** This step determines the type of Web site the customer uses to register so that the appropriate registration form can appear.
- 12 Check AppType 3.** This step determines the type of Web site the customer uses to register if the customer's login does not already exist in the security adapter or the Siebel database.
- 13 Check User Key.** This step validates the prospective contact. It checks to determine whether the required fields for the application-specific unique key already exist and returns an error if this key already exists.
- 14 Handle User Key Errors.** This step determines the type of error that [Step 13](#) returns.
- 15 Copy Object Id.** This step copies the object ID from one process property to another process property.
- 16 Requirements Check.** This step determines whether the user key is valid by using the output argument that [Step 13](#) returns.
- 17 Check Apptype for Missing info.** This step checks for missing information in the registration form for the Web site the customer users to register.
- 18 Missing Info Notification.** This step displays an error message if data for the user key is invalid.

User Registration Forgot Password (CX eService) Workflow

This workflow assigns a random password to a customer when the customer forgets a password. [Figure 4](#) shows this workflow.

The User Registration Initial Process workflow calls this workflow as a subprocess when the customer clicks the Forgot Password link in the Account Login form that appears when the customer clicks the Login link on the home page of the Siebel eService Web site.

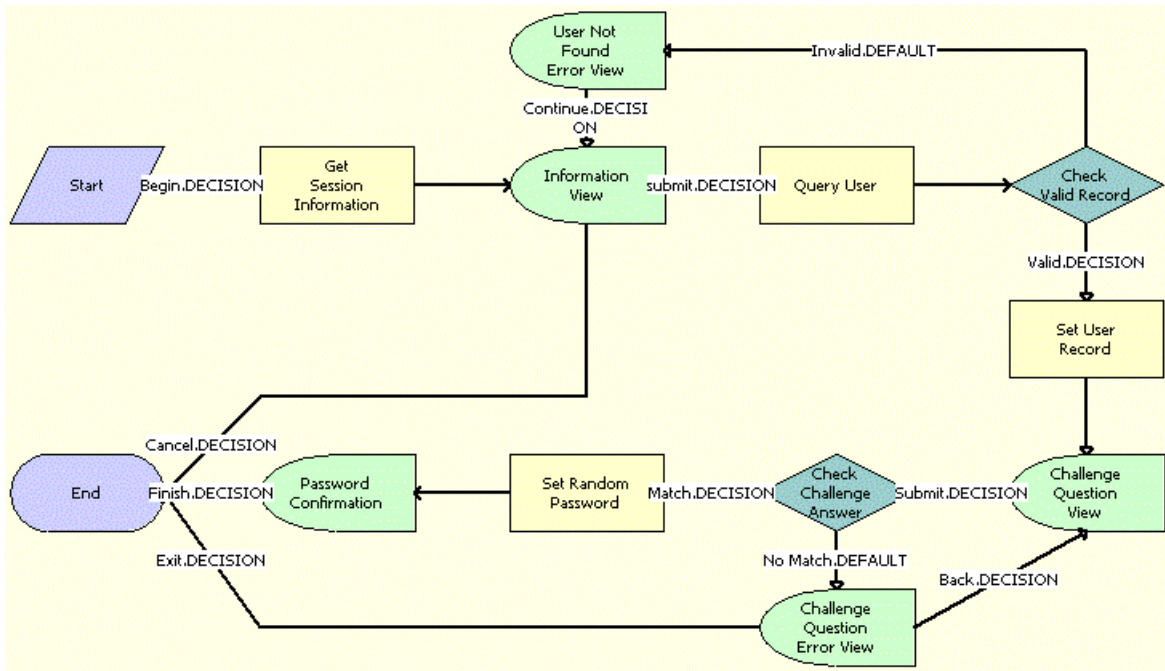


Figure 4. User Registration Forgot Password (CX eService) Workflow

Workflow Description. This workflow performs the following actions:

- 1 **Get Session Information.** This step gets information about the customer's session on the Siebel eService Web site.
- 2 **Information View.** This step shows the Forgot Password form in which the customer enters contact information.
- 3 **Query User.** This step uses the information in the Forgot Password form to find information about the customer after the customer clicks the Submit button on the form.
- 4 **Check Valid Record.** This step determines whether a valid contact record for the customer already exists in the Siebel database.
- 5 **User Not Found Error View.** This step displays an error message if a valid contact record for the customer does not already exist.
- 6 **Set User Record.** This step accesses the valid contact record for the customer if such a record already exists.
- 7 **Challenge Question View.** This step shows the Challenge Question form in which the customer answers a challenge question that the customer created earlier for identity verification.

- 8 Check Challenge Answer.** This step uses the information in the Challenge Question form to determine whether the answer to the challenge question is correct after the customer clicks the Submit button on the form.
- 9 Challenge Question Error View.** This step displays an error message if the answer to the challenge question is incorrect.
- 10 Set Random Password.** This step generates a random password for the customer if the answer to the challenge question is correct.
- 11 Password Confirmation.** This step shows the Confirmation form that notifies the customer that an email containing the random password was sent to the customer.

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