Configuring Siebel EAI Workflows

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Configuring Siebel EAI Workflows

This document provides conceptual information that provides instructions on how to configure Siebel EAI workflows. Specifically, it provides an overview of how to install Siebel Web Server extensions, and how to view, import, modify, and configure Workflow templates. Additionally, it describes how to create a subsystem for a deployed workflow. It includes the following topics:

- "Installing the Siebel Web Server Extension" on page 5
- "Viewing Sample Siebel EAI Workflow Templates" on page 9
- "Sample Siebel Workflow Templates" on page 8
- "Modifying Siebel Workflow Templates" on page 13
- "Setting Up SeeBeyond Workflow Processes" on page 14
- "Creating a Subsystem for a Deployed Workflow" on page 18

Installing the Siebel Web Server Extension

Use the following procedure to install the Siebel Web Server Extension.

▼ To Install Siebel Web Server Extension (SWSE)

1. **From the Siebel installation media, run `\eappweb\setup.exe`, which invokes the installation wizard.**
2. **Follow the instructions presented by the wizard. Use the naming conventions for your Siebel EAI Application Server.**
3. **For Connection Protocol, specify the default port for an HTTP server, which is 80.**
4. **Do *not* use any encryption or compression methods.**

5 **For Anonymous Employee and Anonymous Contact login and password, use SADMIN.**

6 **For Error Level for Logging, enter `All Errors and Warnings`.**

You can change this once correct system operation has been verified.

7 **In the `\bin` directory where you have installed the Siebel Web Server Extension, open the `eapps.cfg` file and note the following (typical values are shown):**

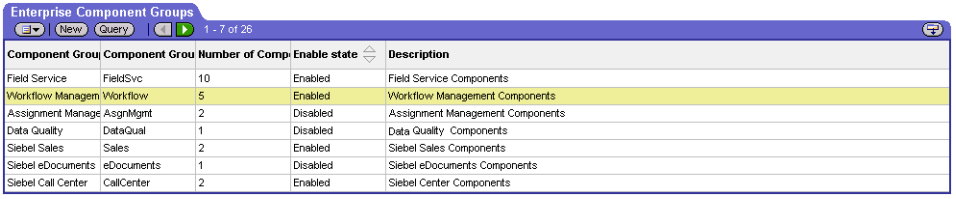
```
[defaults]
AnonUserName = SADMIN
AnonPassword = SADMIN
AnonUserPool = 10
StatsPage = _stats.swe

[/eai]
ConnetString = siebel.TCPIP.none.none://MyGatewayServer:2320/
MyEnterpriseServer/eaiObjMgr/MyAppServerEnableExtServiceOnly = TRUE
```

8 **After modifying these files, stop and then restart the following services:**

- Siebel Server
- World Wide Web Publishing Service

9 **Log in to Siebel 7 and follow the Screens menu path:**

`Ctrl+Shift+A ⇒ Server Administration ⇒ Enterprise Configuration ⇒ Enterprise Component Groups`



Component Grou	Component Grou	Number of Comp	Enable state	Description
Field Service	FieldSvc	10	Enabled	Field Service Components
Workflow Managem	Workflow	5	Enabled	Workflow Management Components
Assignment Manage	AsgnMgmt	2	Disabled	Assignment Management Components
Data Quality	DataQual	1	Disabled	Data Quality Components
Siebel Sales	Sales	2	Enabled	Siebel Sales Components
Siebel eDocuments	eDocuments	1	Disabled	Siebel eDocuments Components
Siebel Call Center	CallCenter	2	Enabled	Siebel Center Components

10 **Select the following items, and then click Enable:**

- Enterprise Application Integration
- Workflow Management
- Communication Management

11 **Open the browser and type *yourservername/module* (for example, 10.1.3.135/eai).**

12 **Click Enter.**

Make sure that your Siebel Server ODBC data source is configured. You can verify which one you are using by examining the Siebel Server log directory—it contains a file listing all the parameters.

▼ To Verify SWSE Operation for Siebel 7

1. **Verify that the Server Request Processor is running correctly. If you need to synchronize the Server Request Components with the Gateway Server, follow this menu/command path:**

   `Enterprise Configuration ⇒ Batch Components Admin ⇒ Synchronize`

2. **Verify that the EAI Object Manager is running correctly.**

   - Follow the path:

     `Server Admin ⇒ Servers ⇒ Server Components`

   - Under Assignment Components, select EAI Object Manager.

3. *For Windows installations only*, **verify that the `.swe` file is associated with `sweiis.dll` in the web site. Use the following procedure to set the association:**

   a. **Run the IIS 4.0 Management Console application.**

   b. **Right-click on your Web site entry in the tree display, and select Properties.**

   c. **Select the Home Directory tab.**

   d. **In the Application Settings box, select Configuration.**

   e. **On the App Mappings tab, select Add.**

   f. **Type `swe`, select `sweiis.dll`, and click OK to save the association.**

4. **Verify that the configuration files are set up properly. If LDAP is not used, comment out all LDAP-related parameters in the configuration files (for example, `eai.cfg` and `siebel.cfg`):**

```
;[SecurityAdapters]
;LDAP = LDAP

;[LDAP]
;DllName = sscfldap.dll
;ServerName =
;Port = 389
;BaseDN =
;UsernameAttributeType = uid
;PasswordAttributeType = userPassword
;CredentialsAttributeType = credentials
;RolesAttributeType = roles
;SslDatabase =
```

Note – The LDAP configuration may differ in your Siebel system depending on your version of Siebel and your installed options. For more information on disabling LDAP in your Siebel system, consult your Siebel user documentation.

5 **After modifying these files, stop and then restart the following services:**

- Siebel Server
- World Wide Web Publishing Service

Sample Siebel Workflow Templates

Sample Siebel EAI workflow templates are provided on the Java CAPS samples site. Before you can work with the samples, you need to download the workflow samples and configure Java CAPS as described in "Configuring Your System Before Creating the OTD" in *Developing OTDs for Oracle Java CAPS Application Adapters*. If you have not already downloaded the sample workflows, they are located at `http://java.net/projects/javacaps-samples/pages/ApplicationAdapterSamples`.

You can import the workflows to Siebel Sales in the Siebel EAI Client by following the menu path:

`Ctrl+Shift+A ⇒ Siebel Workflow Administration ⇒ Workflow Processes`

You need to configure Siebel for the workflows, as described below.

- In the file `SWEApp\eapps.cfg`, verify that the following section is specified correctly:

```
[/eai_enu]
onnectString = siebel.TCPIP.none.none://<Your Gateway Server>:2320/
<Your_Enterprise_Server>/EAIObjMgr_enu/<Your_App Server>
EnableExtServiceOnly = TRUE
WebPublicRootDir=c:<Your_Siebel_Dir>\SWEApp\public\enu
WebUpdatePassword=<Your_Password>
```

- If you are using the **SiebelEAI_jcdUpsert** sample project, add the following sections in the file `siebsrvr\bin\ENU\eai.cfg`:

```
[HTTP Services]
...
SEEBEYOND_HTTP_DELETE = SB_HTTP_DELETE
SEEBEYOND_HTTP_QUERY = SB_HTTP_QUERY
SEEBEYOND_HTTP_UPDATE = SB_HTTP_UPDATE
SEEBEYOND_HTTP_EXECUTE = SB_HTTP_EXECUTE

[SB_HTTP_DELETE]
Mode = Document
Service = SeeBeyond HTTP Delete
Method = RunProcess
```

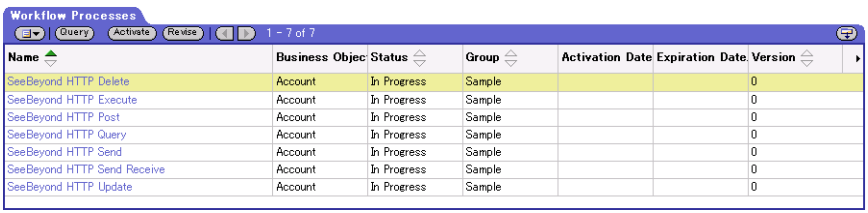
```
[SB_HTTP_QUERY]
Mode = Document
Service = SeeBeyond HTTP Query
Method = RunProcess

[SB_HTTP_UPDATE]
Mode = Document
Service = SeeBeyond HTTP Update
Method = RunProcess
[SB_HTTP_EXECUTE]
Mode = Document
Service = SeeBeyond HTTP Execute
Method = RunProcess
```

Viewing Sample Siebel EAI Workflow Templates

Use the following procedure to view Siebel EAI workflow templates. Following the Screens menu path shown below displays the installed Workflow templates, as shown in Figure 1.

`Siebel Workflow Administration ⇒ Workflow Processes ⇒ All Processes`

FIGURE 1 Java CAPS Workflow Processes



Clicking the process name to invoke a Workflow Process Designer display for that process, such as shown in the figures below.

FIGURE 2 DELETE Workflow Template

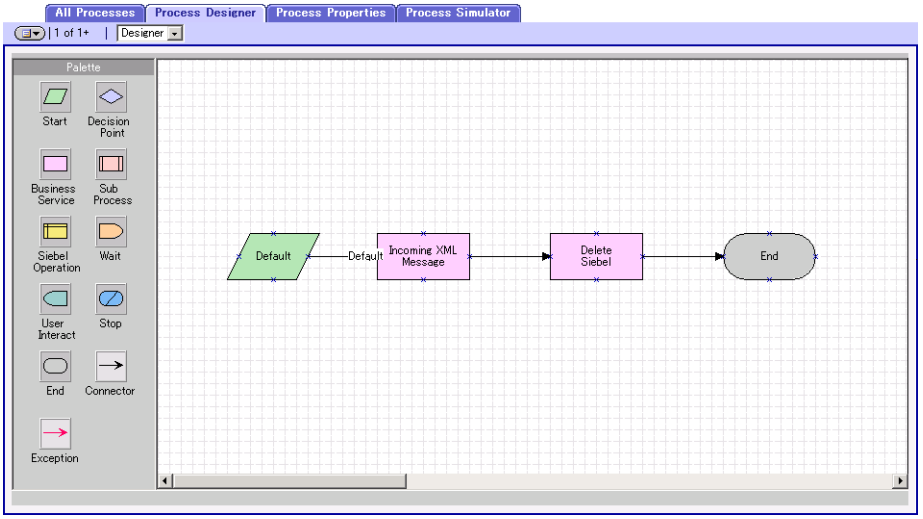


FIGURE 3 QUERY Workflow Template

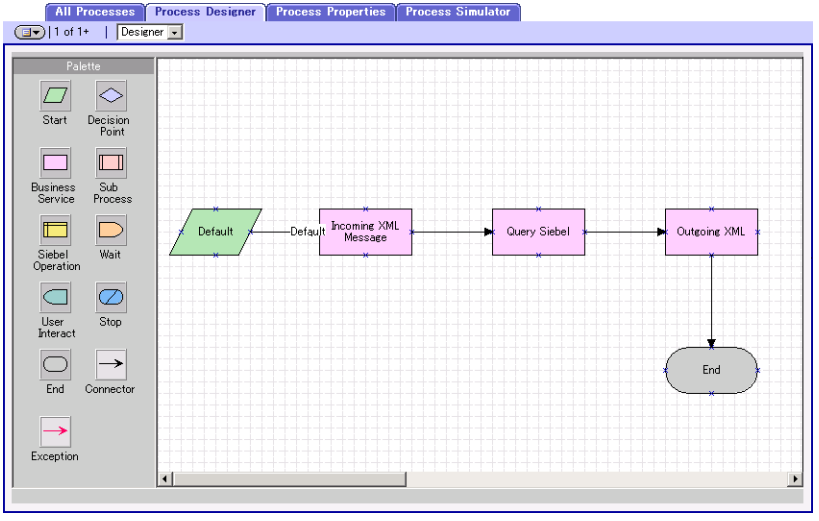


FIGURE 4 INSERT/UPDATE Workflow Template

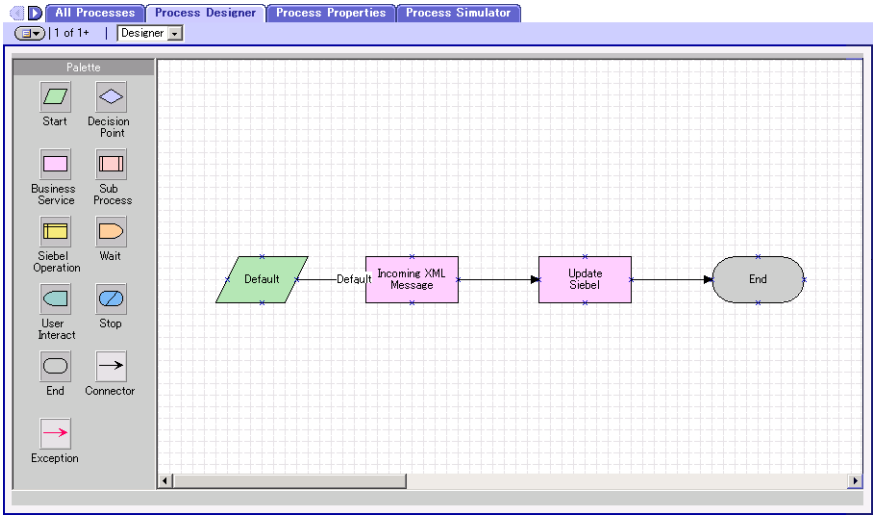


FIGURE 5 EXECUTE Workflow Template

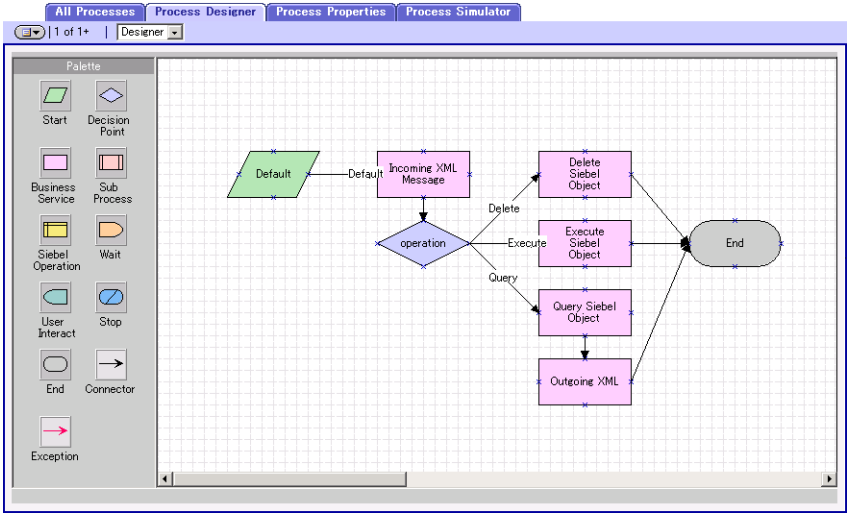


FIGURE 6 SEND Workflow Template

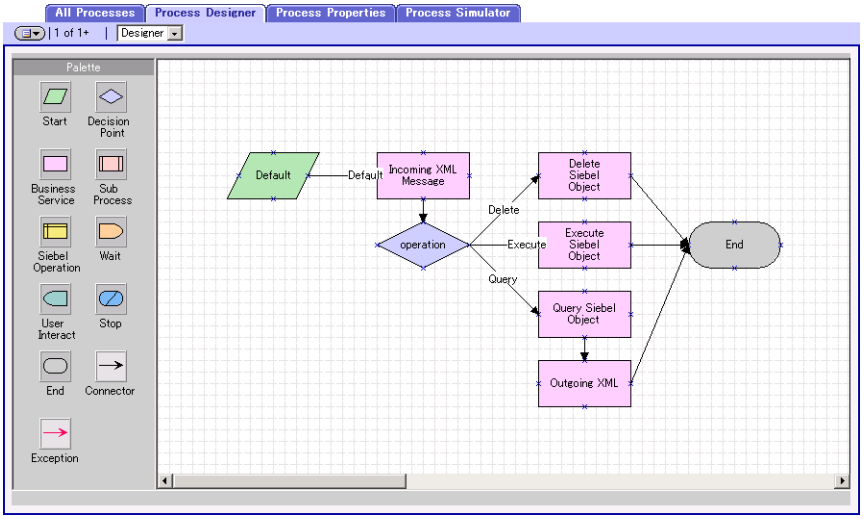


FIGURE 7 SEND/RECEIVE Workflow Template

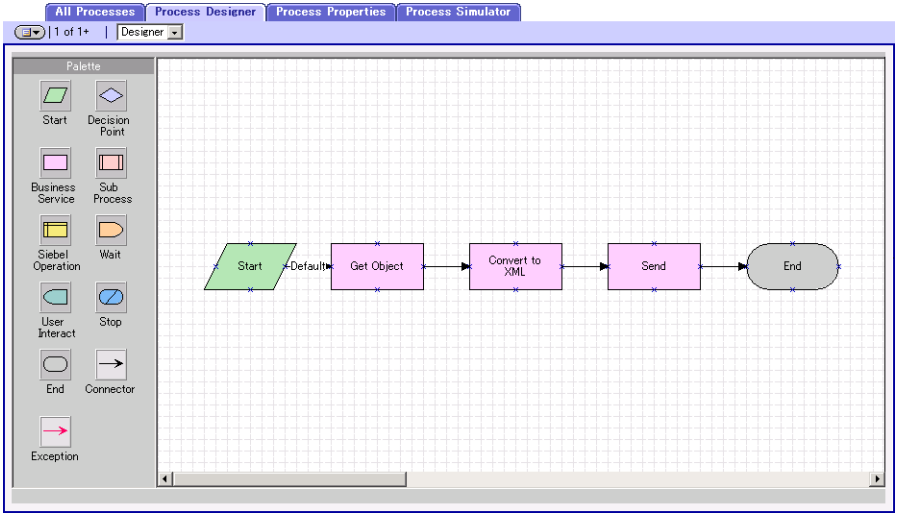
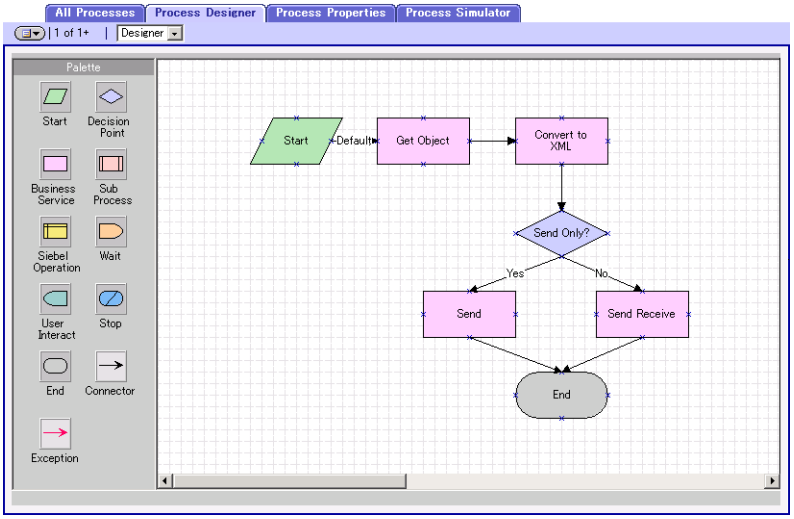


FIGURE 8 POST Workflow Template



Modifying Siebel Workflow Templates

Use the following procedure to modify Siebel EAI workflow templates.

▼ To Modify a SeeBeyond Workflow Template

1. **Log in to Siebel Client 7.0, designating the appropriate Siebel server.**
2. **Follow the menu path:**
   Ctrl+Shift+A ⇒ Siebel Workflow Administration ⇒ Workflow Processes
3. **Highlight the SeeBeyond Workflow Process template you want to modify.**
4. **Right-click and select Copy Record.**
5. **Rename the copied Process.**
6. **Specify the Business Object to which you want to apply the template, and any other fields that may be necessary (for example, Description).**
7. **After modifying a Workflow template you must create the Business Service to execute it, using the supplied Workflow processes as templates. This procedure is described in the following section.**

8 **A new Services section should be added to your `siebsrvr\bin\ENU\eai.cfg` file, as shown in the preceding section.**

For example, if you have a Business Service named Employee Execute, you should add the following lines to the `eai.cfg` file:

```
[HTTP Services]
...
EMPLOYEE_EXECUTE = EE

[EE]
Mode = Document
Service = Employee Execute
Method = RunProcess
```

Setting Up SeeBeyond Workflow Processes

The Workflow processes invoked by the SeeBeyond Workflow Templates must be set up in Siebel Business Services.

Note – The names entered in the last step above are used to set up the Business Service for the sample program supplied with the Adapter. You should use them as templates to create new processes corresponding to the Workflows you create for your own system.

▼ To set Up the Business Service To Execute the Workflow

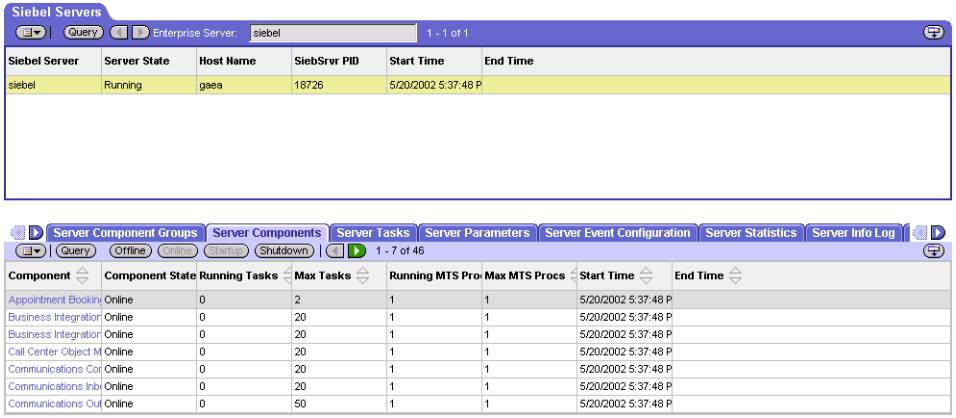
1 **Make sure the following services are running:**

- Siebel Gateway Server
- Siebel Server
- World Wide Web Publishing Service

2 **Log in to Siebel Sales 7.0.**

3 **Follow the Screens menu path:**

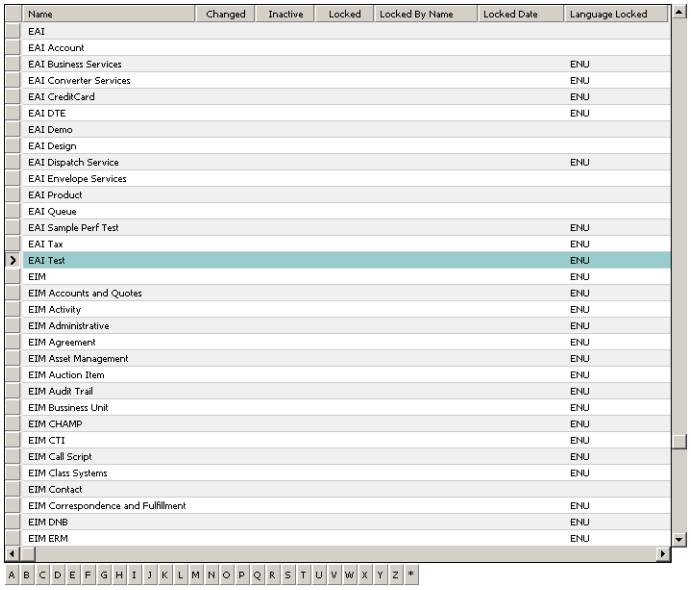
Server Administration ⇒ Servers



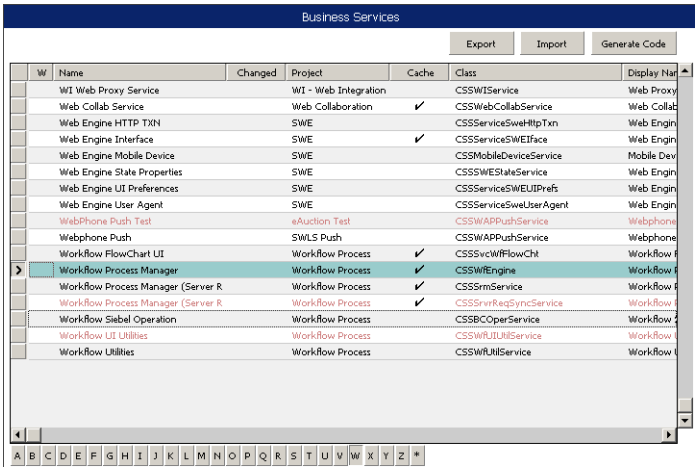
4 **Make sure that Workflow Management is Online and Enabled.**

5 **Log in to Siebel Tools 7.0 and designate the server as the database by entering `sadmin`, `sadmin`, `server`.**

6 **In Object Explorer, go to Siebel Objects ⇒ Project and lock the Project (see the figure below).**



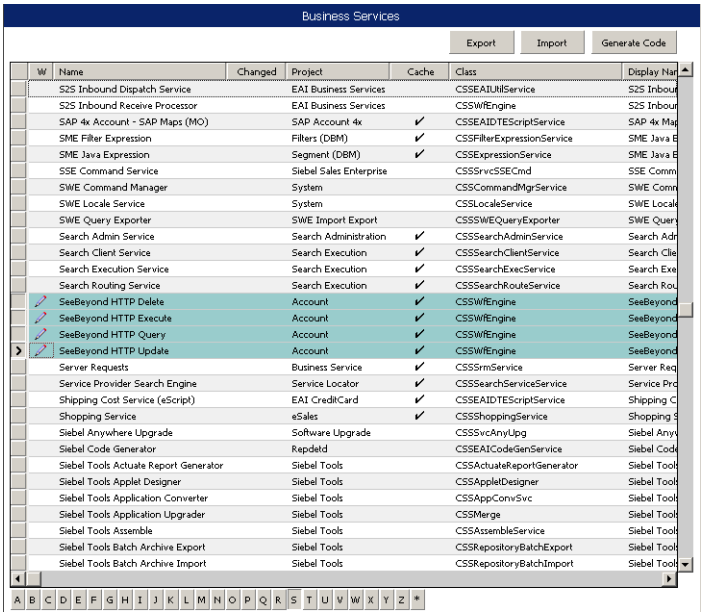
7 In Object Explorer, go to Business Service, make a copy of Workflow Process Manager (menu path Edit ⇒ Copy Record).



8 Type the Process Name into the Name and Display Names fields, as shown below (this name is specified in the `eai.cfg` file).

For the **SiebelEAI_jcdUpsert** project, perform this step for the following:

- SeeBeyond HTTP Delete
- SeeBeyond HTTP Execute
- SeeBeyond HTTP Query
- SeeBeyond HTTP Update



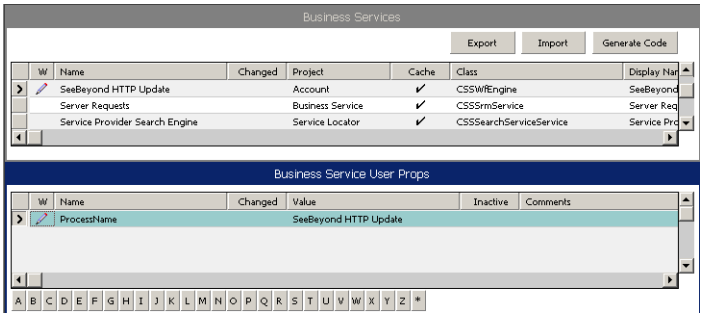
9 In Object Explorer, go to Business Service > Business Service Method:

a. Type ProcessName into the Name field.

b. Type the actual Process Name into the Value field (see the figure below).

For **SiebelEAI_jcdUpsert** project, perform this step for:

- SeeBeyond HTTP Delete
- SeeBeyond HTTP Execute
- SeeBeyond HTTP Query
- SeeBeyond HTTP Update



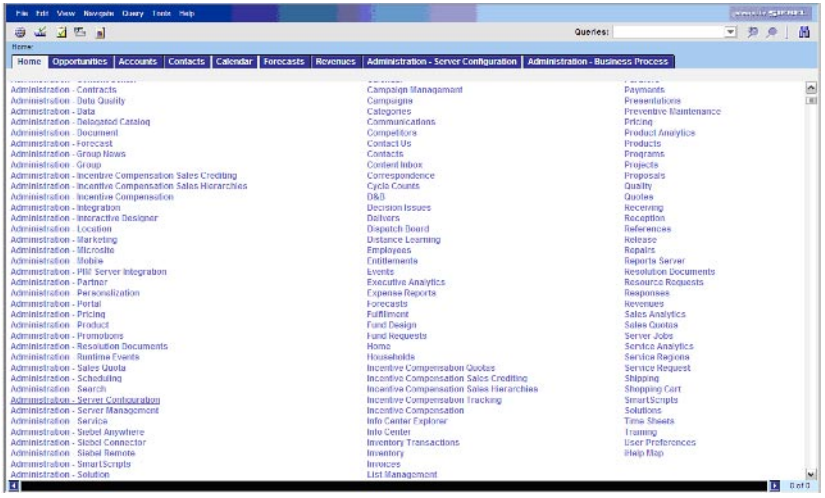
Creating a Subsystem for a Deployed Workflow

Use the following procedure to create a subsystem for a deployed workflow.

▼ To Create a Subsystem For a Deployed Workflow

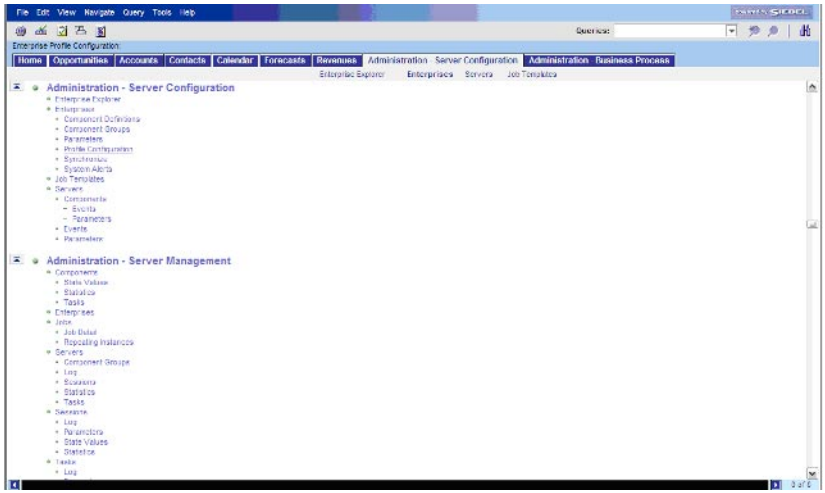
1. **Log in to Siebel Client 7.7, designating the appropriate Siebel server.**
2. **Click the Site Map in the Siebel Client home page.**

FIGURE 9 Administration - Server Configuration



3. **Click the Administration - Server Configuration link. The Administration - Server Configuration page appears.**

FIGURE 10 Administration - Profile Configuration



4 **Click the Profile Configuration link.**

5 **In the Profile Configuration page, create the Named Subsystem (SEEBEYOND_HTTP_UPDATE).**

6 **Set the Workflow Process to Execute parameter for SEEBEYOND_HTTP_UPDATE to SeeBeyond HTTP Update.**

7 **Set the Service Method to Execute parameter for SEEBEYOND_HTTP_UPDATE to RunProcess.**

For this example, **SEEBEYOND_HTTP_UPDATE** is the name of the Named Subsystem. **SeeBeyond HTTP Update** is the Business Service that invokes the **SeeBeyond HTTP Update** Workflow. .

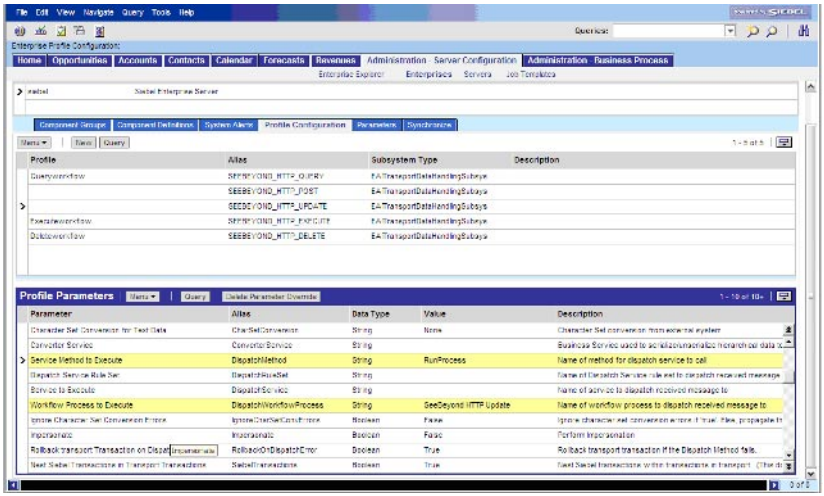



FIGURE 11 SEEBEYOND_HTTP_UPDATE Named Subsystem