# **Configuring Siebel EAI Workflows**

Beta



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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:

 $\mbox{Ctrl+Shift+A} \Rightarrow \mbox{Server Administration} \Rightarrow \mbox{Enterprise Configuration} \Rightarrow \mbox{Enterprise Component Groups}$ 

Enterprise Con	nponent Groups Query)   ( 🏹 D	1 - 7 of 26		( <del>)</del>
Component Group			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:

 $\texttt{Enterprise Configuration} \Rightarrow \texttt{Batch Components Admin} \Rightarrow \texttt{Synchronize}$ 

- 2 Verify that the EAI Object Manager is running correctly.
  - Follow the path:

Server Admin  $\Rightarrow$  Servers  $\Rightarrow$  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:

 $Ctrl+Shift+A \Rightarrow$  Siebel Workflow Administration  $\Rightarrow$  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

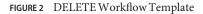
Use the following procedure to view Siebel EAI workflow templates. Following the Screens menu path shown below displays the installed Workflow templates, as shown in Figure 1.

Siebel Workflow Administration  $\Rightarrow$  Workflow Processes  $\Rightarrow$  All Processes

(Query) Activate Revise	💶 💽 1 - 7 of 7					<u> </u>	G
Name 🚔	Business Objec	Status $\Leftrightarrow$	Group 🚔	Activation Date	Expiration Date	Version $\Leftrightarrow$	
SeeBeyond HTTP Delete	Account	In Progress	Sample			0	
SeeBeyond HTTP Execute	Account	In Progress	Sample			0	
SeeBeyond HTTP Post	Account	In Progress	Sample			0	
SeeBeyond HTTP Query	Account	In Progress	Sample			0	
SeeBeyond HTTP Send	Account	In Progress	Sample			0	
SeeBeyond HTTP Send Receive	Account	In Progress	Sample			0	
SeeBeyond HTTP Update	Account	In Progress	Sample			0	

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.



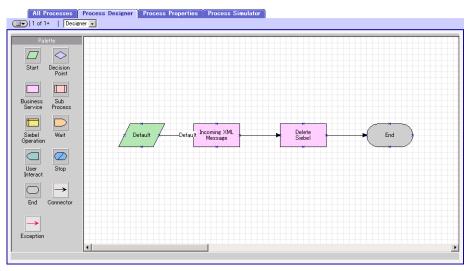
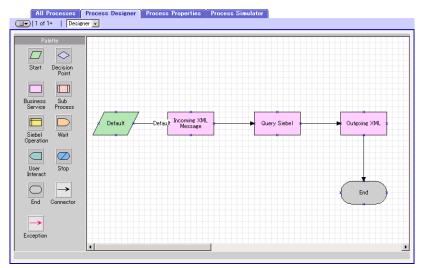


FIGURE 3 QUERY Workflow Template



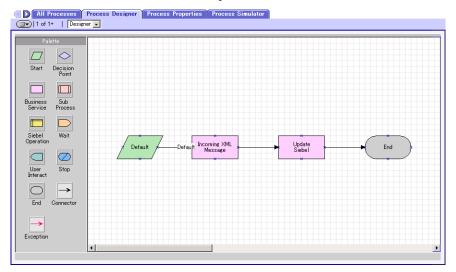


FIGURE 4 INSERT/UPDATE Workflow Template

FIGURE 5 EXECUTE Workflow Template

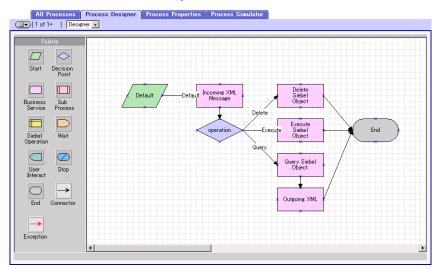


FIGURE 6 SEND Workflow Template

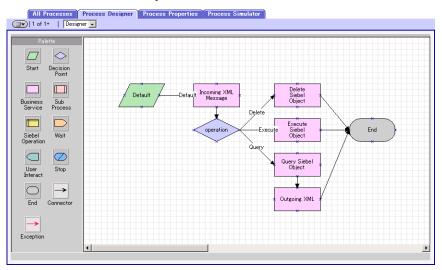
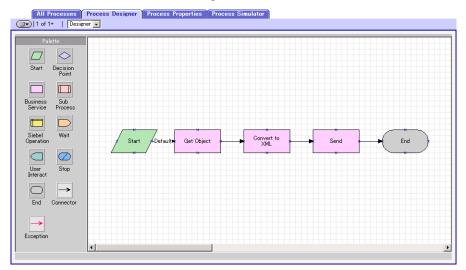


FIGURE 7 SEND/RECEIVE Workflow Template



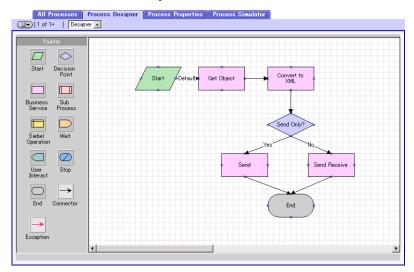


FIGURE 8 POST Workflow Template

# **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  $\Rightarrow$  Siebel Workflow Administration  $\Rightarrow$  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  $\Rightarrow$  Servers

(IT) Quer	🕖 💽 💽 Enterpri	ise Server: siebel		1 - 1 of 1				G
Siebel Server	Server State	Host Name	SiebSrvr PID	Start Time	End Time			
siebel	Running	gaea	18726	5/20/2002 5:37:48 P				
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Server			onents Server 1 town   ( D 1		rameters   Serve	er Event Configura	tion   Server Statistics   Se	
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Component 🖨	Component Stat	<ul> <li>Startup) (Shute</li> </ul>	town)   💽 1	- 7 of 46			End Time 🚔	
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Component Appointment Booki Business Integratio	Component Stat	e) (Startup) (Shuto te Running Tasks 3 0	iown   💽 1 Max Tasks 🔶 2	- 7 of 46	Max MTS Procs	Start Time 🔶 5/20/2002 5:37:48 P	End Time	
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- 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).

	Name	Changed	Inactive	Locked	Locked By Name	Locked Date	Language Locked
	EAI						
	EAI Account						
	EAI Business Services						ENU
	EAI Converter Services						ENU
	EAI CreditCard						ENU
	EAIDTE						ENU
	EAI Demo						
	EAI Design						
	EAI Dispatch Service						ENU
	EAI Envelope Services						
	EAI Product						
	EAI Queue						
	EAI Sample Perf Test						ENU
	EAI Tax						ENU
>	EAI Test						ENU
	EIM						ENU
	EIM Accounts and Quotes						ENU
	EIM Activity						ENU
	EIM Administrative						ENU
	EIM Agreement						ENU
	EIM Asset Management						ENU
	EIM Auction Item						ENU
	EIM Audit Trail						ENU
	EIM Bussiness Unit						ENU
	EIM CHAMP						ENU
	EIM CTI						ENU
	EIM Call Script						ENU
	EIM Class Systems						ENU
	EIM Contact						
	EIM Correspondence and Fulfilment						ENU
	EIM DNB						ENU
	EIM ERM						ENU
4							

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

w	Name	Changed	Project	Cache	Class	Display Na
	WI Web Proxy Service		WI - Web Integration		CSSWIService	Web Prox
	Web Collab Service		Web Collaboration	~	CSSWebCollabService	Web Colla
	Web Engine HTTP TXN		SWE		CSSServiceSweHttpTxn	Web Engir
	Web Engine Interface		SWE	~	CSSServiceSWEIface	Web Engir
	Web Engine Mobile Device		SWE		CSSMobileDeviceService	Mobile Dev
	Web Engine State Properties		SWE		CSSSWEStateService	Web Engin
	Web Engine UI Preferences		SWE		CSSServiceSWEUIPrefs	Web Engir
	Web Engine User Agent		SWE		CSSServiceSweUserAgent	Web Engir
	WebPhone Push Test		eAuction Test		CSSWAPPushService	Webphone
	Webphone Push		SWLS Push		CSSWAPPushService	Webphone
	Workflow FlowChart UI		Workflow Process	~	CSSSvcWfFlowCht	Workflow
	Workflow Process Manager		Workflow Process	~	CSSWIEngine	Workflow
	Workflow Process Manager (Server R		Workflow Process	~	CSSSrmService	Workflow
	Workflow Process Manager (Server R		Workflow Process	~	CSSSrvrReqSyncService	Workflow
	Workflow Siebel Operation		Workflow Process		CSSBCOperService	Workflow
	Workflow UI Utilities		Workflow Process		CSSWRUIUtilService	Workflow
	Workflow Utilities		Workflow Process		CSSWfUtilService	₩orkflow

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

					Export	Import	Generate Code
W	Name	Changed	Project	Cache	Class		Display N
· · · · ·	525 Inbound Dispatch Service		EAI Business Services		CSSEAIUtilSe	nice	S2S Inbo
	S2S Inhound Receive Processor		EAI Business Services		CSSWfEngine		S2S Inbo
	SAP 4x Account - SAP Maps (MO)		SAP Account 4x	~	CSSEAIDTES		SAP 4x M
	SME Filter Expression		Filters (DBM)	~	CSSFilterExpr		SME Jav.
	SME Java Expression		Segment (DBM)	V	CSSExpressio		SME law
	SSE Command Service		Siebel Sales Enterprise		CSSSrvcSSEC		SSE Con
	SWE Command Manager		System		CSSCommand	MarService	SWE Co
	SWE Locale Service		System		CSSLocaleSer		SWE Lo
	SWE Query Exporter		SWE Import Export		CSSSWEQue	ryExporter	SWE Qu
	Search Admin Service		Search Administration	~	CSSSearchAd	minService	Search A
	Search Client Service		Search Execution	~	CSSSearchCli	entService	Search (
	Search Execution Service		Search Execution	~	CSSSearchEx	ecService	Search E
	Search Routing Service		Search Execution	~	CSSSearchRo	uteService	Search R
1	SeeBeyond HTTP Delete		Account	~	CSSWfEngine		SeeBeyo
1	SeeBeyond HTTP Execute		Account	~	CSSWfEngine		SeeBeyo
1	SeeBeyond HTTP Query		Account	~	CSSWÆngine		SeeBeyo
1	SeeBeyond HTTP Update		Account	~	CSSWfEngine		SeeBeyo
	Server Requests		Business Service	~	CSSSrmServi	ce	Server R
	Service Provider Search Engine		Service Locator	~	CSSSearchSe	rviceService	Service I
	Shipping Cost Service (eScript)		EAI CreditCard	~	CSSEAIDTES	criptService	Shipping
	Shopping Service		eSales	~	CSSShopping	Service	Shoppin
	Siebel Anywhere Upgrade		Software Upgrade		CSSSvcAnyU	pg	Siebel Ar
	Siebel Code Generator		Repdetd		CSSEAICode	GenService	Siebel Co
	Siebel Tools Actuate Report Generator		Siebel Tools		CSSActuateRe	eportGenerator	Siebel To
	Siebel Tools Applet Designer		Siebel Tools		CSSAppletDes	signer	Siebel To
	Siebel Tools Application Converter		Siebel Tools		CSSAppConv	Svc	Siebel To
	Siebel Tools Application Upgrader		Siebel Tools		CSSMerge		Siebel To
	Siebel Tools Assemble		Siebel Tools		CSSAssemble	Service	Siebel To
	Siebel Tools Batch Archive Export		Siebel Tools		CSSRepositor	yBatchExport	Siebel To
	Siebel Tools Batch Archive Import		Siebel Tools		CSSRepositor	yBatchImport	Siebel To

- 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

				Business Servi	ces			
						Export	Import	Generate Code
T	W	Name	Changed	Project	Cache	Class		Display Nar
•	1	SeeBeyond HTTP Update		Account	~	CSSWiEngine		SeeBeyond
		Server Requests		Business Service	V	CSSSrmService		Server Req
		Service Provider Search Engine		Service Locator	~	CSSSearchServ	riceService	Service Pro
	_							
đ								Þ
		New		usiness Service Us	er Props	Traction	Coursela	Þ
	W	Name	Bu Changed	Value		Inactive	Comments	<u> </u>
	W	Name ProcestName				Inactive	Comments	

# **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.

File Edit View Nevgele Gaery Tonle Help		and the second se	17 23 10 10 10
⊕ <u>∡</u> <u>⊴</u> ⊑ <u>∎</u>		Queries: 💌 🦻	
ion*			
Home Opportunities Accounts Contacts Calendar Forecasts	Revenues Administration - Server Configuration Administrat	on - Business Process	
dministration - Contracts	Campaign Management	Paymonts	
dministration - Data Quality	Campaigna	Presentations	
dministration - Data	Categories	Preventive Maintenance	
iministration - Delegated Catalog	Communications	Pricing	
Infinistration - Document	Competitora	Product Analytics	
iministration - Forecast	ContactUs	Products	
Ininistration - Group News	Contacts	Programs	
trainistration - Group	Content lubox	Projects	
ministration - Incentive Compensation Sales Crediting	Correspondence	Froposals	
Iministration - Incentive Compensation Sales Hierarchies	Cycla Counts	Quality	
Aministration - Incentive Compensation	080	Quotes	
dministration - Integration	Decision Issues	Receiving	
dministration - Interactive Designer	Delivers	Reception	
dministration Location	Dispatch Board	References	
dministration - Marketing	Distance Learning	Release	
dministration . Microsite	Employees	Repairs	
dministration Mobile	Entitlemente	Reports Server	
dministration - PBF Server Integration	Events	Resolution Documents	
dministration - Partner	Executive Analytics	Resource Requests	
dministration Personalization	Expense Reports	Responses	
dministration - Portal	Forecasts	Revenues	
dministration - Pricing	Fulfilment	Sales Analytics	
dministration Product	Fund Design	Sales Cuotas	
drumstration . Promotions	Fund Requests	Server Jobs	
dministration - Resolution Documents	Home	Sentce Analytics	
dministration . Runtime Events	Herseholds	Service Regions	
dministration - Sales Quota	Incentive Compensation Quotes	Service Request	
dministration - Scheduling	Incentive Compensation Sales Crediting	Shipping	
dministration Search	Incentive Compensation Soles Hierarchies	Shopping Cart	
dministration - Server Configuration	Incentive Compensation Tracking	SmartScripts	
dministration - Server Management	Incentive Compensation	Solutions	
dministration Service	Info Center Explorer	Time Sheets	
dministration - Siebel Anywhere	Info Center	Training	
idministration - Siebel Connector	Inventory Transactions	User Preferences	
dministration Slabel Remote	Imentory	itteip Map	
udministration - SmartScripts	Invoices	STATUS STATES	
dministration - Solution	List Management		

FIGURE 9 Administration - Server Configuration

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

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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.
- 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.

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### $\label{eq:FIGURE11} FIGURE\,11 \quad SEEBEYOND\_HTTP\_UPDATE\,Named\,Subsystem$