



Siebel eService Administration Guide for Siebel Open UI

Siebel Innovation Pack 2014
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What's New in This Release

What's New in Siebel eService Administration Guide for Siebel Open UI, Siebel Innovation Pack 2014

Table 1 lists the changes in this revision of the documentation to support this release of the software.

NOTE: Siebel Innovation Pack 2014 is a continuation of the Siebel 8.1/8.2 release.

Table 1. New Product Features in Siebel eService Administration Guide for Siebel Open UI, Siebel Innovation Pack 2014

Topic	Description
"Tasks for Customers on the Siebel eService Web Site" on page 11	Modified topic. It includes information about performing tasks on the Siebel eService Web site.
"About Configuring Oracle Knowledge for Siebel eService" on page 26	New topic. It includes information about configuring Oracle Knowledge for Siebel eService.
"Configuration Tools for the Siebel eService Web Site" on page 27	Modified topic. It include information about Web templates on the Siebel eService Web site.
"Integrating Oracle Policy Automation With Siebel Public Sector eService" on page 28	New topic. It includes information about integrating Oracle Policy Automation with Siebel Public Sector eService.
"Setting Up the Applet for Twitter" on page 34	New topic. It includes information about how to set up the applet for Twitter on the Siebel eService Web site.
"Configuring the Applets for Program Information" on page 46	New topic. It includes information about how to configure the applets that contain program information on the Siebel eService Web site.
Chapter 6, "Using Siebel eService"	New chapter. It includes information about how customers can use the Siebel eService Web site.
Chapter 7, "Using Siebel Public Sector eService"	New chapter. It includes information about how citizens can use the Siebel Public Sector eService Web site.
"User Registration Initial Process Workflow" on page 83	Modified topic. It includes information about additional steps in the workflow.
"PUB Citizen User Registration Process Workflow" on page 87	New topic. It includes information about the PUB Citizen User Registration Process Workflow.
"PUB Citizen User Registration Forgot Password Process Workflow" on page 91	New topic. It includes information about the PUB Citizen User Registration Forgot Password Process Workflow.

Table 1. New Product Features in Siebel eService Administration Guide for Siebel Open UI, Siebel Innovation Pack 2014

Topic	Description
“OPA Integration Workflow” on page 91	New topic. It includes information about the OPA Integration Workflow.
“OPA Integration Sub Workflow” on page 92	New topic. It includes information about the OPA Integration Sub Workflow.
“PUB Citizen Create Case Activity Workflow” on page 94	New topic. It includes information about the PUB Citizen Create Case Activity Workflow.
“PUB Citizen Case Re-open Workflow” on page 94	New topic. It includes information about the PUB Citizen Case Re-open Workflow.

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 2](#) lists a new chapter 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. 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 3](#) lists the chapters in this guide. The new features described in [Table 3](#) are available in Siebel CRM version 8.1.1.11, Siebel CRM version 8.2.2.4, and later.

Table 3. 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.

Table 3. Chapters in Siebel eService Administration Guide for Siebel Open UI, Version 8.1/8.2

Topic	Description
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.

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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 11](#)
- [Tasks for Customer Service Representatives in Siebel eService on page 12](#)
- [Features of Siebel eService on page 12](#)
- [Requirements for Installing Siebel eService on page 13](#)
- [About Deploying Siebel eService on page 14](#)

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 view only certain sections of the Web site, such as company contact information. 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. For more information, see [“Registering on the Siebel eService Web Site” on page 61](#) and [“Accessing the Siebel eService Web Site” on page 62](#).

Customer service representatives can use Siebel Call Center to register customers on the Siebel eService Web site.

- **Navigate in the Web site.** Customers can click the Side Menu icon on any page, and then select an item in the drop-down list to navigate in the Web site. Also, links to access site functionality appear on the home page. Customers can display these links as records in a list (the List mode) or in tiles of a carousel (the Card mode). They click these links to navigate to a Web page where they can perform a task. If a link appears in a tile, they must click in the tile to select it before they click the link.

Parts of the Web site include records that can appear in carousels, such as office records in the Locate Office view and attachment records for service requests. Customers can click the arrow icons to navigate through the tiles in the carousel.

- **Manage user profiles.** Customers who register on the Siebel eService Web site can update their profile information and passwords. For more information, see [“Updating User Profiles” on page 62](#).

- **Obtain program information.** Customers can review program information. Program information includes news articles and frequently asked questions (FAQs) about programs. For more information, see [“Obtaining Program Information on the Siebel eService Web Site” on page 64.](#)
- **Find office locations.** Customers can find the company office locations that are nearest to them so that they can conveniently communicate with the people in these offices. They can view information about offices, such as postal addresses, phone numbers, and fax numbers. For more information, see [“Finding Office Locations of the Web Site Host” on page 66.](#)

Application administrators can link search results for office locations to map services so that customers can view applicable directions and a map from an online map service provider.
- **Send email to your company.** Customers can communicate through email with your company. For more information, see [“Sending Email to the Web Site Host” on page 67.](#)
- **Use Twitter.** Customers can use Twitter to communicate with your company and with other users of the Siebel eService Web site. For more information, see [“Accessing Twitter on the Siebel eService Web Site” on page 68.](#)
- **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. For more information, see [“Managing Service Requests on the Siebel eService Web Site” on page 68.](#)

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 Twitter 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 26](#).
- **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 40](#).
- **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 41](#).
- **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 42](#).

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*.

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 15](#)
- [Roadmap for Setting Up Siebel eService on page 16](#)
- [About the Application Object Manager Components for Siebel eService on page 17](#)
- [Process of Adding the Application Object Manager Components for Siebel eService on page 17](#)
- [Process of Adding the Virtual Directories for Siebel eService on page 21](#)

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, or if you install the current release as a patch installation for an existing installation of Siebel Innovation Pack 2013 for which you previously performed the tasks in this chapter, 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 15](#).
For more information about installing Siebel eService, see [“Requirements for Installing Siebel eService” on page 13](#).
- 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: The overall installation process includes many specific tasks and requirements that are not mentioned in this topic. For more information about installing Siebel CRM, see the *Siebel Installation Guide* for the operating system you are using.
- 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 17](#).
- 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 21](#).

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 17](#).

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 17](#)

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 20](#)

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 17](#).

NOTE: Perform this process only if it is required for your installation case. For more information, see [“About Setting Up Siebel eService” on page 15](#).

This process is a step in [“Roadmap for Setting Up Siebel eService” on page 16](#).

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 18](#)) and repeat the task in [“Running the new_compdef_sia Script” on page 20](#).

This task is a step in “[Process of Adding the Application Object Manager Components for Siebel eService](#)” on page 17.

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/bin/lang*.

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/bin/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: Local eCode        = 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      = SelfServiceDefiniton
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 20](#).

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 17](#).

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 17](#) (but change the content that you specify in [Step 7 on page 18](#)) and repeat this task.

This task is a step in [“Process of Adding the Application Object Manager Components for Siebel eService” on page 17](#).

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 21](#).

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 21](#)

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 22](#)

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 15](#).

This process is a step in [“Roadmap for Setting Up Siebel eService” on page 16](#).

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 21](#).

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 22](#).

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 21](#).

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 21](#).

This task is a step in ["Process of Adding the Virtual Directories for Siebel eService" on page 21](#).

To run the new_virdirs script

- 1 Navigate to *SWSE_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 25](#)
- [About Configuring Oracle Knowledge for Siebel eService on page 26](#)
- [Configuring Siebel eService on page 26](#)
- [Configuration Tools for the Siebel eService Web Site on page 27](#)
- [Integrating Oracle Policy Automation With Siebel Public Sector eService on page 28](#)
- [Setting Up the Applet for Twitter on page 34](#)

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*.

About Configuring Oracle Knowledge for Siebel eService

Siebel eService is integrated with Oracle Knowledge so that customers can review information about programs on the Siebel eService Web site. This information includes details about programs, frequently asked questions (FAQs) about programs, and news articles about programs. Developers can use widgets in Oracle Knowledge to create applets of information about programs on the Siebel eService Web site. For more information about these widgets, see *Oracle Knowledge for RightNow Integration Guide* on the Oracle Knowledge bookshelf on Oracle Technology Network.

The program details, news articles, and FAQs that appear in the Siebel eService Web site are stored in dedicated content channels of the Information Manager database in Oracle Knowledge. To integrate Siebel eService and Oracle Knowledge, administrators configure these channels. These channels provide a framework to define and manage specific document types, such as program details, news articles, and FAQs. For more information, see *Oracle Knowledge Information Manager Administration Guide* on the Oracle Knowledge bookshelf on Oracle Technology Network.

Administrators can use the Knowledge Management Configuration view of the Administration - Application screen to set up additional criteria for the information about programs in applets on the Siebel eService Web site. This view shows the URL of the Information Manager Server for Oracle Knowledge. A custom physical renderer that is associated with the applets reads the additional criteria and uses widgets in Oracle Knowledge to pass the configuration information to the server for Oracle Knowledge. The physical renderer then gets the resulting data from the server and displays it in the applets. For more information about setting up the additional criteria, see [“Configuring the Applets for Program Information” on page 46](#).

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 Home Page Web Template.** Defines the layout of the view for the home page. This template is `SSViewContainer_Home.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 Web 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 `SSAppletDetailForm.swt`.
 - **Form Applet Web Template.** Defines the layout of a form applet. This template is `SSAppletFormGridLayout.swt`.
 - **Form Base Applet Web Template.** Defines the layout of a form applet in an applet that can display forms or tiles. This template is `SSAppletFormGridLayout_Base.swt`.

- The following template applies to list applets:
 - **Oracle Knowledge Applet Web Template.** Defines the layout of the program applet and the news article applet for Oracle Knowledge. This template is `SSAppletOKList.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_NavLink_ss.swt`.
 - **Vertical Tile List Applet Web Template.** Defines the layout of a tile list applet when the tiles appear vertically. This template is `SSAppletVerticalTile.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:
 - **Login Applet Web Template.** Defines the layout of the login applet. This template is `SSAppletLogin.swt`.
 - **Explicit Login Applet Web Template.** Defines the layout of the login applet when you must log in to the eService Web site again. This template is `SSAppletExplicitLogin.swt`.
 - **Oracle Knowledge Search Applet Web Template.** Defines the layout of the Oracle Knowledge search applet. This template is `SSAppletOKSearch.swt`.
 - **Social Media Applet Web Template.** Defines the layout of a social media applet. This template is `SSAppletSingleDiv.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.

Integrating Oracle Policy Automation With Siebel Public Sector eService

Use the following information to integrate Oracle Policy Automation (OPA) with Siebel Public Sector eService:

- [“Prerequisites for Integrating Oracle Policy Automation” on page 29](#)
- [“Securing Web Service Communications with Oracle Policy Automation” on page 29](#)
- [“Control Types for Integrating Oracle Policy Automation” on page 31](#)
- [“Custom Properties for Control Types” on page 31](#)
- [“Custom Properties for Screens” on page 33](#)

Prerequisites for Integrating Oracle Policy Automation

Before you can integrate Oracle Policy Automation (OPA) with Siebel Public Sector eService, you must complete the following tasks:

- Create and deploy a rulebase in OPA.

A sample rulebase project is packaged in Siebel Tools, and you can extract the rulebase project from the following directory:

```
Tools_install_location\REPPATCH\SampleScreening.zip
```

When you deploy the rulebase, you must change the its deployment name to Screening so that it functions with the preconfigured OPA integration.

- Activate the following workflows:

- OPA Integration Workflow

You must also reload the runtime events for this workflow. For more information about this workflow, see [“OPA Integration Workflow” on page 91](#).

- OPA Integration Sub Workflow

For more information about this workflow, see [“OPA Integration Sub Workflow” on page 92](#).

- Use the InvokeWorkflow method in the OPA Interface Service business service to call the OPA Integration Workflow. For information about other methods in this business service, see [“OPA Integration Workflow” on page 91](#) and [“OPA Integration Sub Workflow” on page 92](#).

The required input parameters for the InvokeWorkflow method are Rulebase and WorkflowName. If you want to add other input parameters to this method, then you must define these parameters in the process properties of the workflow so that the workflow can receive these parameters.

To configure the text for the Close button on the last screen of the interview session, you pass the CloseBtnLOV input parameter to the InvokeWorkflow method. The value for this parameter is a Type field value that you set up in the List of Values view of the Administration - Data screen in Siebel Public Sector. In this view, specify a value for the Type field (for example, OPA_CLOSE), for the Language-Independent Code field (for example, close) and for the Display Value field (for example, Apply).

Securing Web Service Communications with Oracle Policy Automation

In the preconfigured Siebel Public Sector eService application, Web service communications with Oracle Policy Automation are anonymous. User credentials are not required for such communications. You can complete the task in this topic so that user credentials are required for such communications.

Before you complete this task, you must secure the policy model that is deployed as a Web service. For more information about completing this task, see *Oracle Policy Modeling User's Guide* on Oracle Technology Network.

To secure Web service communications with Oracle Policy Automation

- 1 To create a symbolic URL, complete the following steps:
 - a In Siebel Public Sector, navigate to the Administration - Integration screen, then the WI Symbolic URL List view.
 - b Select Symbolic URL Administration in the visibility filter.
 - c Create a new record, and complete the fields as appropriate.

The field values in this record are not important because this record is only a placeholder record.

- 2 To set up the user credentials, complete the following steps:
 - a In Siebel Public Sector, navigate to the Administration - Integration screen, then the SSO Systems Admin List view.
 - b Create a new record, and complete the fields as appropriate.

Some fields are described in the following table.

Field	Comments
System Name	Type the system name (for example, OPA_INT).
Symbolic URL Name	Select the symbolic URL that you create in Step 1 .

- c In the SSO System Users list, create a new record, and complete the fields as appropriate. Some fields are described in the following table.

Field	Comments
Siebel Login Name	Select the existing Siebel login name (for example SADMIN), or create a new Siebel login name.
Login Name	Type the login name for OPA.
Password	Type the password for OPA.

- 3 For the OPA Integration Sub Workflow, change the following process properties:
 - **Secure Connection.** Change to YES or TRUE.
 - **SSO System Name.** Change to the system name that you designate in [Step 2](#) (for example, OPA_INT).
 - **Siebel Login Id.** Change to the login name that you designate in [Step 2](#) (for example, SADMIN).

Control Types for Integrating Oracle Policy Automation

Table 4 compares the control types in Oracle Policy Modeling (OPM), in Siebel Public Sector eService, and in HTML files for Web pages in Siebel Public Sector eService.

Table 4. Control Types in OPM, Siebel Public Sector eService Web Sites, and HTML Files

Attribute Type in Oracle Policy Modeling	Control Type in Oracle Policy Modeling	Control Type in Siebel Public Sector eService	Control Type in HTML Files for Web Pages
None	Image	Image	Label
None	Label	Label	Label
Boolean	Check box	Check box	Check box
Text	Radio button	Radio button	Select
Text, Number, Currency, Date, Date and Time	Text box	Text, Date time	Text
Text	List	Combo box	Select
Text	Drop-down	Combo box	Select
Text	Multiline text box	Text area	Text area

Custom Properties for Control Types

In a rulebase in Oracle Policy Modeling (OPM), you define custom properties for the control types by entering values for keys. Do not change keys. For more information about setting up a rulebase in Oracle Policy Modeling, see *Oracle Policy Modeling User's Guide* on Oracle Technology Network.

You use the values for keys when you configure the HTML files for Web pages. Sample HTML files are available for the Web server in the following directory: `publi c / / ang/html templ ates/sampl es/ps`. In this directory, *ang* is the three-letter code for the applicable language, such as ENU for U.S. English.

Custom Properties for Labels

In the custom properties for a label, you enter a unique value for the SBL_LBL_ID key.

You use the value for this key when you designate the attribute ID value of a label control in an HTML file for a Web page. An example follows:

```
<label id="Label 1" style="display: none;"></label >
```

where:

Label 1 is the value for this key.

For accessibility support and aria labels, add the tabindex property to the code. An example follows:

```
<label id="Label 1" tabindex = "0" style="display: none;"></label >
```

where:

Label 1 is the value for this key.

Custom Properties for Images

In the custom properties for an image, you enter a unique value for the SBL_LBL_ID key.

You use the value for this key when you designate the attribute ID value of a label control in an HTML file for a Web page. An example follows:

```
<label id="SBL_IMG_ID" style="display: none;"></label >
```

where:

SBL_IMG_ID is the value for this key.

When you select an image in OPM, the Browse button is not supported for this integration. You can enter the relative path to the image (for example, images/sample.png, if the image is available in the images directory of the Siebel Web server). Also, you can enter the complete URL for the image.

For accessibility support and aria labels, define the image in the HTML file, not in OPA. An example follows:

```
</img>
```

Custom Properties for Additional Controls

In the custom properties for a check box, radio button, text, date time, combo box, or text area in Siebel Public Sector eService, you enter a unique value for the SBL_LBL_ID key and the SBL_CTRL_ID key.

You use the value for these 2 keys when you designate the attribute ID value of the control in an HTML file for a Web page. An example for the control type of text box in OPM (or the control types of text and date time in Siebel Public Sector eService) follows:

```
<label id="SBL_LBL_1" style="display: none;"></label >  
<input id="SBL_CTRL_1" type="text" name="SBL_CTRL_1" aria-labelledby="SBL_LBL_1"  
style="display: none;"/>
```

where:

SBL_LBL_1 is the value for the SBL_LBL_ID key.

SBL_CTRL_1 is the value for the SBL_CTRL_ID key.

This example uses `<input type="text">` code for a control type of text box in OPM (or the control types of text and date time in Siebel Public Sector eService). For additional control types, note the following code:

- For a control type of check box in OPM (or the control type of check box in Siebel Public Sector eService), use `<input type="checkbox">` code.
- For the control types of radio button, list, and drop-down in OPM (or the control types of radio button and combo box in Siebel Public Sector eService), use `<select>` code.

- For a control type of multiline text box in OPM (or the control type of text area in Siebel Public Sector eService), use `<textarea>` code.

NOTE: You must include the `aria-labelledby="SBL_LBL_1"` code for these additional control types, where `SBL_LBL_1` is the value for the `SBL_LBL_ID` key. Also, this code supports accessibility and aria labels.

Custom Properties for Screens

In a rulebase in Oracle Policy Modeling (OPM), you define custom properties for screens by entering values for keys. Do not change keys. For more information about setting up a rulebase in Oracle Policy Modeling, see *Oracle Policy Modeling User's Guide* on Oracle Technology Network.

You use the values for keys when you configure the HTML files for Web pages. Sample HTML files are available for the Web server in the following directory: `public/lang/html templates/samples/ps`. In this directory, *lang* is the three-letter code for the applicable language, such as `ENU` for U.S. English.

In the custom properties for a screen, you enter a unique value for the following keys:

- **SBL_TEMPLATE_NAME.** Specifies the template name for the screen.

You use the value for this key when you designate the name of the HTML file for a Web page.

- **SBL_TITLE_ID.** Specifies the ID of the title for the screen.

You use the value for this key when you designate the attribute ID value of the title for a screen in the HTML file for a Web page. An example follows:

```
<label id="SBL_TITLE" style="display: none;"></label >
```

where:

`SBL_TITLE` is the value for this key.

- **SBL_BTN_NEXT.** Specifies the ID of the Next button.

You use the value for this key when you designate the attribute ID value of the Next button for a screen in the HTML file for a Web page. An example follows:

```
<button id="SBL_BTN_NEXT" style="display: none;"></button>
```

where:

`SBL_BTN_NEXT` is the value for this key.

- **SBL_BTN_BACK.** Specifies the ID of the Back button.

You use the value for this key when you designate the attribute ID value of the Back button for a screen in the HTML file for a Web page. An example follows:

```
<button id="SBL_BTN_BACK" style="display: none;"></button>
```

where:

`SBL_BTN_BACK` is the value for this key.

- **SBL_IS_LAST_SCREEN.** Specifies whether the screen is the last screen in a series of screens. For the last screen in a series of screens, enter a value of YES for this key. For other screens in the series, enter a value of NO for this key.

Setting Up the Applet for Twitter

To set up the applet for Twitter, perform the following tasks:

- 1 "Obtaining a Twitter Widget" on page 34
- 2 "Displaying the Twitter Widget in Siebel eService" on page 35
- 3 "Designating the Height and Width of the Twitter Timeline" on page 36

Obtaining a Twitter Widget

To display Twitter Tweets in the Siebel eService Web site, you must first obtain a Twitter widget from Twitter.

NOTE: Siebel eService provides a framework for you to create a Web application for your end users. If you choose to display Twitter Tweets in the Web application that you create, then your Web application is subject to Twitter's terms. You do NOT receive a license to use the Twitter service, sites, content, products, or any software under your agreement with Oracle. The Twitter service, sites, content, products, and software must be separately licensed from Twitter. You bear all risks associated with the access and use of Twitter service, sites, content, products, and software. If you choose to display Twitter Tweets in the Web application that you create, then the Twitter widget is available for you to license separately from Twitter subject to Twitter, Inc.'s terms and conditions, policies, rules, and requirements. The Twitter widget downloads javascript that runs on the client side when your Web application opens.

For more information about configuring Twitter widgets, see the Client Side Options section at <https://dev.twitter.com/docs/embedded-timelines>

To obtain a Twitter widget

- 1 Navigate to <https://twitter.com/settings>
- 2 Enter your Twitter user name and password to access the widget page.
- 3 Click the Widgets link in the left pane.
- 4 Click Create New.
You use the Twitter timeline tool to configure the public Twitter widget that appears in a Web site.
- 5 Click the Search tab, and provide values for the following fields to configure the timeline:
 - a **Search Query.** The search word or hashtag that the Twitter timeline shows (for example, #Oracle, #Siebel, #hadoop, and so on).

- b Options.** Options about the content in Tweets. These options include the following check boxes:
 - Only show top Tweets
 - Safe search mode (Exclude sensitive content and profanity)
 - Auto-expand photos
- c Height.** The height of the Twitter timeline.
- d Theme.** The background color (white or black) of the Tweets.
- e Link color.** The color for the links that appear in the Tweets.

After you provide these values, a preview of your timeline appears on the right side of the screen.

6 Click Create Widget.

The following message appears: Your widget has been created.

Below the preview of the timeline, generated code appears. You copy and paste this generated code into an empty div element of a Web template file. For more information, see [“Displaying the Twitter Widget in Siebel eService” on page 35](#).

7 Note the widget ID before the `</script>` tag at the end of the generated code.

An example of the code around the widget ID follows:

```
(document, "scri pt", "twi tter-wj s"); </scri pt>
```

where:

twitter-wjs is the widget ID.

You note the widget ID because you will enter this ID into an empty div element of a Web template file. For more information, see [“Displaying the Twitter Widget in Siebel eService” on page 35](#).

- 8** (Optional) To verify that this generated code displays the widget, complete the following steps:
- a** Create an HTML file with an empty div element.
 - b** Copy and paste the generated code inside the div element.
 - c** Launch the file in a browser.

Displaying the Twitter Widget in Siebel eService

After you obtain the Twitter widget from Twitter, you display that widget in a form applet in Siebel eService.

To display the Twitter widget in Siebel eService

- 1** Create a Web template file with a name of Twitter.swt and an empty div element.

The file content follows:

```
<!-- Template Start Twi tter. swt -->
```

```
<div>  
</div>  
  
<!-- Template End Twitter.swt -->
```

2 Complete the following steps to enter content in the empty div element:

a Enter the following script tag in the empty div element:

```
<script>  
twtr=document.getElementById ("widgetID")  
if(twtr){  
    twtr.remove();  
    twtr=null;  
}  
</script>
```

where:

widget ID is the widget ID that you note in [Step 7](#) of “[Obtaining a Twitter Widget](#)” on page 34.

b After the script tag, copy and paste the generated code that appears when you complete [Step 6](#) of “[Obtaining a Twitter Widget](#)” on page 34.

3 In Siebel tools, create a new Web template with a name and a filename of Twitter.swt.

4 Create an empty form applet with a name of Twitter, and complete the followings steps for this applet:

a Set the class name to CSSFrameBase.

b In the Base mode of the applet Web template, set the Web template to Twitter.swt.

c Add the applet to the view where you want Tweets to appear.

5 Compile the changes in the [Step 3](#) and [Step 4](#) into the Siebel Repository File.

6 Clear the browser cache, and re-start Siebel eService.

Designating the Height and Width of the Twitter Timeline

For the Twitter timeline, the minimum width is 180 pixels, and the maximum width is 520 pixels. The minimum height of the timeline is 200 pixels.

You can use data-tweet-limit, which is a client side attribute that Twitter provides, to configure the number of Tweets that appear in the Twitter applet in Siebel eService. When you configure the number of Tweets that appear in the Twitter applet, customers cannot scroll in the applet.

The task to designate the height and width of the Twitter timeline is an optional task, but consider the number of Tweets that appear the Twitter applet if you complete this task. For example, if you configure 5 Tweets in the Twitter applet, but the height and width of the Twitter timeline can accommodate only 2 or 3 Tweets, then only 2 or 3 Tweets appear in the applet. Although the Twitter server forwards 5 Tweets, only 2 or 3 Tweets appear in the applet because scrolling is disabled in the applet. You can increase the dimensions of the Twitter timeline to accommodate more Tweets.

For more information about the height and width of the Twitter timeline, see the Dimensions section at

<https://dev.twitter.com/docs/embedded-timelines>

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 39](#)
- [About the Security Framework for Siebel eService on page 39](#)
- [About Email Notifications on page 42](#)
- [Administering Navigation Links on page 42](#)
- [Process of Administering Web Access on page 44](#)
- [Configuring the Applets for Program Information on page 46](#)
- [Process of Setting Up Office Locations on page 47](#)
- [Setting Up Information for Email on page 51](#)
- [Process of Administering Service Requests on page 53](#)
- [Process of Setting Up Email Notifications on page 56](#)

About Administering Siebel eService

After configuring Siebel eService, you perform 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 perform 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 40](#) and [“Access Control for Siebel eService” on page 41](#).

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

Table 5. 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 perform 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 spoofing. 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 56](#).

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, office 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 a gateway to an external Web site. An external Web site might be a social media Web site, such as the Web site for Twitter.

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.

- 2 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/LocateOffice.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. ■ Invoke Task. For this value, the task that is designated in the Task Name field starts when customers click the navigation link. ■ Goto URL. For this value, the external Web site that is designated in the URL field appears when customers click the navigation link. ■ Invoke Business Service. For this value, the business service that is designated in the Business Service Name field is called 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 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.
Description	Type a description of the navigation link.

Field	Comments
Business Service Name	Select the name of the business service that is called when customers click the navigation link. This field applies only if you select a value of Invoke Business Service in the Action field.
Business Service Method Name	Select the applicable method in the business service. You must select a business service before you can select a method in it.

- 3 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.
- 4 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.
- 5 If the method that you select in the Business Service Method field includes input parameters, then add a record for each parameter in the Business Service Parameters list.

Some fields are described in the following table.

Field	Comments
Parameter Name	Type the name of the parameter.
Parameter Value	Type the value of the parameter.
Expression	Select this check box if the parameter contains an expression, such as GetProfileAttribute. Expressions must exclude business component fields.

Process of Administering Web Access

To administer Web access, perform the following tasks:

- 1 ["Activating the Workflow for Email Password Button" on page 44](#)
- 2 ["Registering Customers" on page 45](#)
- 3 ["Reassigning Passwords" on page 46](#)

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 44.

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 44.

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> .

Field	Comments
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 44.](#)

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 44.](#)

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.

Configuring the Applets for Program Information

Siebel eService is integrated with Oracle Knowledge so that customers can review information about programs on the Siebel eService Web site. This information includes details about programs, frequently asked questions (FAQs) about programs, and news articles about programs. Program information appears in applets on the Siebel eService Web site. Administrators can configure criteria for the information that appears in these applets. For more information, see [“About Configuring Oracle Knowledge for Siebel eService” on page 26.](#)

To configure an applet for programs

- 1 Navigate to the Administration - Application screen, then the Knowledge Management Configuration view.
- 2 Change the sample URL address in the Oracle Knowledge URL field to the appropriate URL address of the Information Manager Server for Oracle Knowledge.
- 3 In the Knowledge Management Configuration list, create a new record, and complete the fields as appropriate.

The following table describes some of the fields.

Field	Description
Applet Name	<p>Select the name of applet that you want to configure. For example, you might configure the following applets for a Siebel Public Sector eService Web site:</p> <ul style="list-style-type: none"> ■ Ask a Question Applet (CX sService) ■ News Applet (CX sService) ■ News Search Applet (CX sService) ■ Service Programs Applet (CX sService) ■ Service Programs Search Applet (CX sService) <p>These applets are associated with a custom physical renderer. Any new applets that you create must use this custom physical renderer.</p>
Channel Name	Type the name of the channel for the applet. For more information about applet channels in Oracle Knowledge, see <i>Oracle Knowledge Information Manager Administration Guide</i> .
Num Records	Type the maximum number of records that can appear in the applet.
Sort By	Select the field value by which records are sorted in the applet.
Type	<p>Select the type of records to include in the applet. Values include:</p> <ul style="list-style-type: none"> ■ common. Records that the user accessed the most often. ■ recent. Records that the user accessed the most recently. ■ popular. Records that all users accessed the most often.

Process of Setting Up Office Locations

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

Customers can perform office location searches by using a city, state, or ZIP code query. In the results of the search, the offices 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 office locations, perform the following tasks:

- 1 "Importing Geocode Data" on page 48
- 2 "Creating Divisions for Office Locations" on page 49
- 3 "Creating Categories for Office Locations" on page 49
- 4 "Creating Office Locations" on page 50
- 5 "Linking Search Results to Map Services" on page 51

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 6](#) shows the columns in this database table that must have data.

Table 6. 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 6](#).

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

This task is a step in "Process of Setting Up Office Locations" on page 47.

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 Office Locations

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

This task is a step in [“Process of Setting Up Office Locations”](#) on page 47.

To create a division for an office 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 Office Locations

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

This task is a step in [“Process of Setting Up Office Locations”](#) on page 47.

To create a category for an office 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 office 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 Office Locations

You can create searchable office locations.

This task is a step in ["Process of Setting Up Office Locations"](#) on page 47.

To create an office 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 office location. For more information, see "Creating Categories for Office Locations" on page 49.
Longitude	Type the longitude for the office. 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 office. 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 Office Locations" on page 49.
Address	Select the address for the office.

Linking Search Results to Map Services

In the preconfigured Siebel eService application, search results for office locations are not linked to map services. Application administrators can link search results for office 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 office 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 office 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 Office Locations” on page 47](#).

Setting Up Information for Email

Customers can submit email messages by completing a form in the Contact Us view. The contents of the form are converted into an email message and routed to an email address in your email application.

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 information for email

- 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 the name of the account. Customers see this name in the drop-down list for the To field of the email form in the Contact Us view of the Siebel eService Web site when both of the following conditions are met: <ul style="list-style-type: none"> ■ The customers are associated with the organization for the account. ■ The account has an email address.
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 you 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, telephone 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 Administering Service Requests

To administer service requests, perform the following tasks:

- 1 [“Adding Updates to Service Requests” on page 53](#)
- 2 [“Creating Solutions” on page 54](#)
- 3 [“Associating Solutions with Service Requests” on page 54](#)
- 4 [“Associating Attachments with Service Requests” on page 55](#)

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 53](#).

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.
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 53](#).

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 53](#).

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 53](#).

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 56](#)
- 2 ["Designating Customers for Email Notifications" on page 57](#)
- 3 ["Changing Parameters for Generate Triggers Component" on page 57](#)
- 4 ["Starting the Task for Generate Triggers Component" on page 57](#)
- 5 ["Changing Parameters for Workflow Monitor Agent Component" on page 58](#)
- 6 ["Starting the Task for Workflow Monitor Agent Component" on page 58](#)

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 56](#).

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 56](#).

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 56](#).

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 56](#).

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 56](#).

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 57](#).

This task is a step in ["Process of Setting Up Email Notifications" on page 56](#).

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.

6

Using Siebel eService

This chapter includes information about how customers can use the Siebel eService Web site. It includes the following topics:

- [Managing User Profiles on the Siebel eService Web Site on page 61](#)
- [Accessing the Siebel eService Web Site on page 62](#)
- [Obtaining Program Information on the Siebel eService Web Site on page 64](#)
- [Contacting the Web Site Host on page 66](#)
- [Accessing Twitter on the Siebel eService Web Site on page 68](#)
- [Managing Service Requests on the Siebel eService Web Site on page 68](#)

Managing User Profiles on the Siebel eService Web Site

Only registered customers who enter a user name and password to access the Siebel eService Web site can manage user profiles. To manage user profiles on Siebel eService, customers perform the following tasks:

- [“Registering on the Siebel eService Web Site” on page 61](#)
- [“Updating User Profiles” on page 62](#)

Registering on the Siebel eService Web Site

If customers do not register on the Siebel eService Web site, then they can access limited functionality on the Web site. When customers register, they provide personal and contact information about themselves, and they create user names and passwords for themselves. When they access the site again, they enter this user name and password to log in to the site so that they can access additional functionality that is unavailable to customers who do not register.

To complete the registration process, customers must enter data in all of the fields in the registration form that have a star icon. At any time during this process, they can click the Cancel button to stop the process and not create a registration record.

Customers can register on the Siebel eService Web site only after administrators configure the LDAP security adapter for user authentication. For more information about configuring the LDAP security adapter, see *Siebel Security Guide*.

To register on the Siebel eService Web site

- 1 Click the Create an account link in the Log In applet on the home page.
- 2 In the User Registration view that appears, enter the appropriate data in the form fields.
- 3 Review the terms and conditions for using the site, and select the check box at the bottom of the form to indicate that you agree with these terms and conditions.

You must agree to the usage terms to register on the site.

- 4 Click Register.

The home page appears again.

Updating User Profiles

When customers register on the Siebel eService Web site, they create user profiles that include their personal information (such as their names), their contact information (such as their phone numbers), and their passwords. They can update this information in their user profiles.

To update a user profile

- 1 Click the UPDATE PROFILE link on the home page.

Alternatively, you can click the Side Menu icon on any page, and select My Profile.

The User Profile view appears.

- 2 Click the pencil icon.
- 3 Change the appropriate fields in the form as necessary, and click Submit.

If you do not want to update your profile, then click the back arrow icon.

The User Profile view appears again.

- 4 Click Change Password.
- 5 Enter data in the appropriate fields in the form, and click Save.

If you do not want to update your password, then click Cancel.

The User Profile view appears again.

Accessing the Siebel eService Web Site

To access the Siebel eService Web site, registered customers perform the following tasks:

- [“Logging In to the Siebel eService Web Site” on page 63](#)
- [“Obtaining a New Password” on page 63](#)

Logging In to the Siebel eService Web Site

After customers register on the Siebel eService Web site, they can log in to the Web site to access additional functionality.

To log in to the Siebel eService Web site

- 1 Enter your user name and password in the Log In applet on the home page.
- 2 (Optional) Click the HTML5 Browser Compatibility link in the Log In applet to show your browser's compatibility with HTML5 features.

HTML5 is a core technology markup language of the Internet and is used to structure and present content on the Web. If an HTML5 feature is not compatible with your browser, then you can click the question mark icon to review more information about that feature and about the limitations that you might experience in the Siebel CRM application because of this incompatibility.

- 3 Click Log In.

The home page appears again.

Logging Out of the Siebel eService Web Site

If customers log in to the Siebel eService Web site, they can log out of the Web site after they finish using the available functionality.

To log out of the Siebel eService Web site

- 1 Click the Settings icon in the top right corner of any page.
- 2 Click Logout.

The home page appears.

Obtaining a New Password

If registered customers forget their passwords, then they can obtain new passwords. Siebel eService automatically creates these new passwords, and customers can change these passwords after they use them log in to the Siebel eService Web site.

To obtain a new password

- 1 Click the Forgot Your Password? link in the Log In applet on the home page.
The Forgot Password form appears.
- 2 Enter information in the form, and click Submit.
The Challenge Question form appears.

- 3 Enter information in the form, and click Submit.

If your answer to the challenge question is correct, then the Assign Temporary Password form appears.

- 4 Note your temporary password, and click Close.

The home page appears again.

Obtaining Program Information on the Siebel eService Web Site

Both registered customers who enter a user name and password to access the Siebel eService Web site and anonymous customers who do not register on the Web site can obtain information about programs. To obtain information about programs, customers perform the following tasks:

- [“Searching the Knowledge Database for Program Information” on page 64](#)
- [“Reviewing Program Information” on page 65](#)
- [“Reviewing News Articles” on page 65](#)

Searching the Knowledge Database for Program Information

Customers can search the knowledge database for information about all programs. The knowledge database includes information about programs, news articles about programs, and frequently asked questions (FAQs) about programs. If customers want to search the knowledge database for information about a specific program, then they can review program information. For more information, see [“Reviewing Program Information” on page 65](#).

To search the knowledge database for program information

- 1 Click the ASK A QUESTION link on the home page.

A search view appears.

- 2 If you know the ID of the document that you want to find, then complete the following steps:

- a In the text field, enter the ID of the document.
- b Click Search.

A dialog box showing the document content appears. You can close the dialog box after you review its contents.

- 3 If you do not know the ID of the document that you want to find, then complete the following steps:

- a In the text field, enter text about the subject for which you want information.

- b** (Optional) Click the Specified Languages link, and select the check boxes for the languages of the documents that you want to appear in your search results.
- c** Click Search.

Information that meets your search criteria appears in the Results applet. Values to further restrict the number of result records appear in the Filters applet. The Start Over link appears below the field in which you enter text about the subject of the search.
- d** (Optional) If you want to further restrict the number of the result records, then click the links for the appropriate values in the Filters applet.

You can click the Clear icon to clear your selections.
- e** (Optional) If you want to perform another search, then click the Start Over link, and repeat [Step a](#) through [Step d](#).
- f** Click the link for the title of the appropriate record in the Results applet.

A dialog box showing details about that record appears. You can close the dialog box after you review its contents.

Reviewing Program Information

Customers can review details about programs. These details might include descriptions of programs, requirements to qualify for programs, and procedures to apply for programs.

To review program information

- In the Service Programs applet on the home page, complete one of the following steps:
 - If the program that you want to view appears in the applet, then click the link for the program to view information about the program.

A dialog box showing details about the program appears. You can close the dialog box after you review its contents.
 - If the program that you want to view does not appear in the applet, then click View More to find the program in the search view that appears.

For more information about finding programs in the search view that appears, see [“Searching the Knowledge Database for Program Information” on page 64](#).

Reviewing News Articles

Customers can review news articles that can include information about programs.

To review news articles

- In the News applet on the home page, complete one of the following steps:

- If the news article that you want to view appears in the applet, then click the link for the article to view information about the article.
A dialog box showing details about the news article appears. You can close the dialog box after you review its contents.
- If the news article that you want to view does not appear in the applet, then click View More to find the article in the search view that appears.
For more information about finding articles in the search view that appears, see [“Searching the Knowledge Database for Program Information” on page 64](#).

Contacting the Web Site Host

Both registered customers who enter a user name and password to access the Siebel eService Web site and anonymous customers who do not register on the Web site can contact the Web site host. To contact the Web site host, customers perform the following tasks:

- [“Finding Office Locations of the Web Site Host” on page 66](#)
- [“Sending Email to the Web Site Host” on page 67](#)

Finding Office Locations of the Web Site Host

Customers can access information about the offices of the Web site host. They use this information to communicate with the Web site host. A record for an office can include a postal address, a telephone number, and a fax number. Customers might want to find the offices that are close to an area, such as the area where they live, so that they can conveniently communicate with the people at these offices.

To find office locations of the Web site host

- 1 Click the LOCATE OFFICE link on the home page.

Alternatively, you can click the Side Menu icon on any page, and select Locate Office.

The Locate Office view appears.

- 2 Complete the appropriate fields in the form.

You do not have to enter values in all form fields.

Some fields are described in the following table.

Field	Comments
City	Type the city of the office location. If you enter value in this field, then you must enter a value in the State field.
State	Select the state of the office location. If you enter value in this field, then you must enter a value in the City field.

Field	Comments
Zip Code	Type the zip code of the office location.
Country	Select the country of the office location.
Type	Select the type of office location.
Range	Select the range in miles between the office location and the location that the zip code designates.

3 Click Submit.

Records for the offices that meet your search criteria appear. If a map appears in the Locate Office view, then the map updates to reflect the information that you enter in the form.

4 Select the display mode of records for the offices as follows:

- If you want the records to appear as tiles in a carousel, then click Card.
- If you want the records to appear in a list, then click List.

Sending Email to the Web Site Host

Customers can use the Siebel eService Web site to send email to the Web site host.

To send an email to the Web site host

1 Click the CONTACT US link on the home page.

Alternatively, you can click the Side Menu icon on any page, and select Contact Us.

The Contact Us view appears.

2 Complete the fields in the email form.

You can enlarge the field for the message text by dragging down and to the right the bottom right corner of the field.

3 Click Submit to send the email to the Web site host.

A message appears to indicate that the email was sent.

4 Click OK.

The home page appears.

Accessing Twitter on the Siebel eService Web Site

Both registered customers who enter a user name and password to access the Siebel eService Web site and anonymous customers who do not register on the Web site can access Twitter to discuss site content with other people.

In the Twitter applet on the home page, you can view the comments of other people. When you click the links in the Twitter applet, the Twitter Web site appears in a new browser window. If you have a Twitter account with a user name and password, then you enter these credentials in the new browser window. After entering your credentials, you can enter new comments, respond to comments, forward comments to other people, and designate comments as your favorite comments.

Developers can use client-side configuration that Twitter provides to hide the hashtag link and the Twitter icon at the top of the Twitter applet. For information about setting up the Twitter applet on the Siebel eService Web site, see [“Setting Up the Applet for Twitter” on page 34](#).

To access Twitter on the Siebel eService Web site

- 1 Scroll down to the Twitter applet on the home page.
- 2 To enter a new comment that is not a response to an existing comment, click the hashtag link at the top of the Twitter applet.
- 3 To respond to an existing comment, hover your mouse over the comment, and click one of the following icons that appears:
 - **Single arrow icon.** Click this icon to reply to the comment.
 - **Double arrow icon.** Click this icon to forward the comment to other people.
 - **Star icon.** Click this icon to designate the comment as a favorite comment of yours.
- 4 (Optional) If you want to view the Twitter page of the person who is associated with a comment, then click the name of a person in the comment or the image in the comment.
- 5 (Optional) If you want to access the home page of the Twitter Web site, then click the Twitter icon in the top right corner of the Twitter applet.

Managing Service Requests on the Siebel eService Web Site

Only registered customers who enter a user name and password to access the Siebel eService Web site can manager service requests. To manage service requests, customers perform the following tasks:

- [“Submitting Service Requests” on page 69](#)
- [“Adding Attachments to Service Requests” on page 69](#)
- [“Adding Updates to Service Requests” on page 70](#)
- [“Viewing Solutions for Service Requests” on page 71](#)

Submitting Service Requests

Customers can submit service requests about issues that they encounter.

To submit a service request

- 1 Click the VIEW OR SUBMIT SERVICE REQUESTS link on the home page.
Alternatively, you can click the Side Menu icon on any page, and select Service Requests.
The Service Requests view appears.
- 2 Click the plus (+) icon.
A new record for the service request is created in the list of service requests.
- 3 Enter information in the fields of the new record for the service request.

Adding Attachments to Service Requests

Customers can add URLs and files to service requests to help communicate the issues in the service requests. Also, customer service representatives can use Siebel Call Center to associate attachments with service requests.

To add an attachment to a service request

- 1 If a record for the service request appears in the My Service Requests applet on the home page, then click the hyperlink in the SR number (#) field of the record.
Records for the service requests that are most recently submitted and updated appear in the My Service Requests applet.
- 2 If a record for the service request does not appear in the My Service Requests applet on the home, then complete the following steps:
 - a Click the VIEW OR SUBMIT SERVICE REQUESTS link on the home page.
Alternatively, you can click the Side Menu icon on any page, and select Service Requests.
 - b (Optional) Query to find a specific service request.
 - c In the Service Requests view, click the hyperlink in the SR number (#) field for the service request to which you want to add an attachment.
The fields for the service request appear at the top of the page. Below the fields are applets for attachments, updates, and solutions for the service request.
- 3 Select the display mode of records in the Attachments applet as follows:
 - If you want the attachment records to appear as tiles in a carousel, then click Card.
 - If you want the attachment records to appear in a list, then click List.
- 4 To add a file attachment, complete the following steps:

- 3 In the Updates applet, click the plus (+) icon.
A new record for the update is created in the list of updates.
- 4 Enter information in the fields of the new record for the update.

Viewing Solutions for Service Requests

Customers can view the solutions (relevant documents) that are associated with service requests. Customer service representatives can use Siebel Call Center to associate solutions with service requests.

To view the solutions for a service request

- 1 If a record for the service request appears in the My Service Requests applet on the home page, then click the hyperlink in the SR number (#) field of the record.
Records for the service requests that are most recently submitted and updated appear in the My Service Requests applet.
- 2 If a record for the service request does not appear in the My Service Requests applet on the home, then complete the following steps:
 - a Click the VIEW OR SUBMIT SERVICE REQUESTS link on the home page.
Alternatively, you can click the Side Menu icon on any page, and select Service Requests.
 - b (Optional) Query to find a specific service request.
 - c In the Service Requests view, click the hyperlink in the SR number (#) field for the service request for which you want to view solutions.
The fields for the service request appear at the top of the page. Below the fields are applets for attachments, updates, and solutions for the service request.
- 3 In the Solutions applet, review the solutions that are associated with the service request.
- 4 To view more information about a solution, click the hyperlink in the Name field of the solution record.

7

Using Siebel Public Sector eService

This chapter includes information about how citizens can use the Siebel Public Sector eService Web site. It includes the following topics:

- [About Siebel Public Sector eService on page 73](#)
- [Determining Benefits Eligibility on Siebel Public Sector eService on page 74](#)
- [Managing Cases on Siebel Public Sector eService on page 75](#)

About Siebel Public Sector eService

Citizens can perform the following tasks, which are available in both Siebel eService and Siebel Public Sector eService:

- Manage their user profiles.
- Obtain information about agency programs.
- Contact the Web site host.
- Access Twitter to discuss agency programs and with other people.

For information about performing these tasks, see [Chapter 6, "Using Siebel eService."](#)

Also, citizens can perform the following tasks, which are available in only Siebel Public Sector eService:

- Determine benefits that might apply to them.
- View information about their cases and update those cases with additional information.
- Request appointments and appeals for their cases.

This chapter applies to the Siebel Public Sector eService for the Open UI client, and not to the standard-interactivity client. The Open UI client uses the Public Sector Self Service object manager (PSSServiceObjMgr alias) in the Siebel Public Sector component group, while the standard-interactivity client uses the Public Sector eService object manager (PSeServiceObjMgr alias) in the Siebel Public Sector component group. For information about Siebel Public Sector eService for the standard-interactivity client, see *Siebel eService Administration Guide Addendum for Industry Applications*.

About National Identification Numbers

The home page for Siebel eService and Siebel Public Sector eService enables new users to register and provides both anonymous and registered users with links to more information. However, when users register in Siebel Public Sector eService, they must provide a national identification number, such as a U.S. social security number (SSN), as part of the registration process.

By default, Siebel Public Sector eService uses the U.S. social security number as the national identification number in the user registration process. You can use Siebel Tools to configure Siebel Public Sector eService to use a different national identification number for user registration and identification.

About Contacts in Siebel Public Sector

When users complete the registration process in Siebel Public Sector eService, a contact record is automatically created for them in the Siebel Public Sector application. When users are registering, if the value that they select in the User ID field already exists in the Siebel Public Sector application, then an error message appears. They must select a different value to complete the registration process.

Siebel Public Sector eService uses only the User ID field to uniquely identify a contact. Consequently, a user can register multiple times using different values in the User ID field and the same values in other fields, such as First Name, Last Name, and SSN. In this case, multiple contact records for the same user are created in the Siebel Public Sector application. Agents can manually delete these duplicate records. You can use tools for master data management, such as Oracle's Siebel Universal Customer Master (UCM), to automatically identify and display duplicate contact records. For more information about tools for master data management, see *Oracle Customer Hub (UCM) Master Data Management Reference*.

Determining Benefits Eligibility on Siebel Public Sector eService

Both registered citizens who enter a user name and password to access the Siebel Public Sector eService Web site and anonymous citizens who do not register on the Web site can determine the benefits that might apply to them.

Before they apply for benefits, citizens can supply some preliminary information about themselves to determine the benefits that might apply to them. They can complete this screening task as many times as they like, and change the information that they supply to determine if their changes affect the benefits that apply to them. They cannot determine the specifics of their actual benefits until after they apply for those benefits.

To determine benefits eligibility

- 1 On the home page of the Siebel Public Sector eService Web site, click the SCREENING FOR SERVICES link.

If the link appears in a tile, you must click in the tile to select it before you click the link.

A form in which you can supply preliminary information about yourself appears.

- 2 Complete the appropriate fields in the form.

You must enter a value in fields that have a star icon.

3 Click Next.

In the view that appears, the names of the benefit programs that might apply to you appear.

4 Complete one of the following steps:

- a** If you want to change the preliminary information that you have already supplied, click Previous and go to [Step 2](#).
- b** If you do not want to retain the preliminary information that you already supplied, click Close.

Managing Cases on Siebel Public Sector eService

Only registered citizens who enter a user name and password to access the Siebel Public Sector eService Web site can manage cases. To manage cases on Siebel Public Sector eService, citizens perform the following tasks:

- [“Viewing Cases” on page 75](#)
- [“Updating Cases” on page 76](#)
- [“Requesting Appointments for Cases” on page 78](#)
- [“Viewing the Status of Appointment Requests” on page 78](#)
- [“Requesting Appeals for Cases” on page 79](#)
- [“Viewing the Status of Appeal Requests” on page 80](#)

Viewing Cases

By default, the citizen who creates an application (the primary contact) is automatically granted access to the case that is created when an agent uploads the application into the Siebel Public Sector application, and other household contacts in the application are not automatically granted access to this case. If another user creates an application for a citizen, then that user and the citizen (the primary contact) are automatically granted access to this case. Administrators can configure this default behavior to automatically grant case access to all of the application contacts or to none of the application contacts.

In addition to automatically creating cases by uploading applications that citizens submit, an agent can manually create cases in the Siebel Public Sector application. An agent can select the Web Access field in any contact record for an automatically-created case or a manually-created case to grant case access to that contact. Likewise, an agent can clear this Web Access field to deny case access to that contact. Thus, citizens who do not complete and submit applications in the Siebel Public Sector eService Web site can still view cases for applications that include them as household contacts. For more information about flagging cases for Web access, see the information about adding contact information to cases in *Siebel Public Sector Guide*.

To view a case

- 1 If a record for the case appears in the My Cases applet on the home page of the Siebel Public Sector eService Web site, then click the hyperlink in the Case Number field of the record.

Records for the cases that are most recently created and updated appear in the My Cases applet on the home page.

Details about the case appear in a view for the case and in applets for additional case information, such as attachments, activities, benefit plans, benefits, and payments.

- 2 If a record for the case does not appear in the My Cases applet on the home page of the Siebel Public Sector eService Web site, then complete the following steps:

- a Click the Side Menu icon, and select My Cases.
- b (Optional) Query to find a specific case.
- c In the My Cases view, click the hyperlink in the Case Number field for the case that you want to view.

Details about the case appear in a view for the case and in applets for additional case information, such as attachments, activities, benefit plans, benefits, and payments.

Updating Cases

A citizen can update cases by adding attachments to cases and by adding information about activities that are associated with cases. The attachments and activities that citizens add also appear in the Attachments view of the Cases screen and the Activities view of the Cases screen in the Siebel Public Sector application.

In the Siebel Public Sector application, an agent can add attachment records and activity records to a case. If a citizen has access to the case in the Siebel Public Sector eService Web site, then the citizen can view only the attachment records and activity records for which the agent selects the Web Access field.

NOTE: If the Status field for the case is Submitted, then citizens cannot add attachments and activities to the case.

To update a case

- 1 If a record for the case appears in the My Cases applet on the home page of the Siebel Public Sector eService Web site, then click the hyperlink in the Case Number field of the record.

Records for the cases that are most recently created and updated appear in the My Cases applet on the home page.

- 2 If a record for the case does not appear in the My Cases applet on the home page of the Siebel Public Sector eService Web site, then complete the following steps:

- a Click the Side Menu icon, and select My Cases.
- b (Optional) Query to find a specific case.

Requesting Appointments for Cases

To request appointments for their cases, citizens can create activity records for appointment requests.

To request an appointment for a case

- 1** If a record for the case appears in the My Cases applet on the home page of the Siebel Public Sector eService Web site, then click the hyperlink in the Case Number field of the record.

Records for the cases that are most recently created and updated appear in the My Cases applet on the home page.
- 2** If a record for the case does not appear in the My Cases applet on the home page of the Siebel Public Sector eService Web site, then complete the following steps:
 - a** Click the Side Menu icon, and select My Cases.
 - b** (Optional) Query to find a specific case.
 - c** In the My Cases view, click the hyperlink in the Case Number field for the case for which you want to request an appointment.
- 3** In the Activities applet, complete the following steps:
 - a** Click the plus (+) icon.
 - b** Complete the appropriate fields for the activity, and select Appointment in the Type field.
 - c** Click Submit.

The new activity record for the appointment is added to the Activities applet. The Type field value of the activity record is Appointment, and the Status field value of the activity record is Active. You cannot change or delete this activity, but an agent can change (but not delete) this activity in the Siebel Public Sector application.
- 4** If you want to include in the case a document that supports the appointment request, then add an attachment to the case for which you request the appointment.

For information about adding a file attachment to a case, see [Step 4 in “Updating Cases” on page 76](#).

Viewing the Status of Appointment Requests

An agent can accept or reject an appointment request in the Siebel Public Sector application. To accept the appointment request, the agent changes the Status field for the activity record associated with the appointment request from Active to Confirmed, and the agent might enter text in the Description field of the activity record to explain the reason for accepting the appointment request. After the agent completes these acceptance tasks, the following changes occur in the Siebel Public Sector eService Web site:

- The Status field for the activity record associated with the appointment request changes from Active to Confirmed.

- The Summary field for the activity record associated with the appointment request changes to include text that the agent enters to explain the reason for accepting the appointment request.

To reject the appointment request in the Public Sector application, the agent changes the Status field for the activity record associated with the appointment request from Active to Declined. The agent also enters text in the Description field of this activity record to explain the reason for rejecting the appointment request. If the agent rejects the appointment request because of a scheduling conflict, then the agent can suggest other appointment times when entering this text. The citizen can request another appointment for a rejected appointment request. For more information about accepting or rejecting appointment requests for cases, see *Siebel Public Sector Guide*.

To view the status of an appointment request

- 1 If a record for the case appears in the My Cases applet on the home page of the Siebel Public Sector eService Web site, then click the hyperlink in the Case Number field of the record.
Records for the cases that are most recently created and updated appear in the My Cases applet on the home page.
- 2 If a record for the case does not appear in the My Cases applet on the home page of the Siebel Public Sector eService Web site, then complete the following steps:
 - a Click the Side Menu icon, and select My Cases.
 - b (Optional) Query to find a specific case.
 - c In the My Cases view, click the hyperlink in the Case Number field of the case for which you want to view more information about an appointment request.
- 3 In the Activities applet, complete the following steps:
 - a Note the value in the Status field of the appointment request.
 - If the value is Confirmed, then an agent accepted the appointment request.
 - If the value is Declined, then an agent rejected the appointment request.
 - If the value is Active, then an agent has not yet accepted or rejected the appointment request.
 - b If the Status field value is Confirmed or Declined, then note any additional text the agent entered in the Summary field to explain the reason for acceptance or rejection.

Requesting Appeals for Cases

If citizens are not satisfied with the benefits that they receive, then they can notify an agency that they want to appeal their case. When a citizen requests an appeal for a case, an activity record for the appeal request is automatically created.

NOTE: In the Siebel Public Sector eService Web site, the Appeal Request button is enabled only for cases that have a Category field of Benefit in the Siebel Public Sector application. Administrators can enable this button for additional case categories. For more information about configuring case categories for appeal cases, see *Siebel Public Sector Guide*.

To request an appeal for a case

- 1 To access the case, complete the following steps:
 - a Click the Side Menu icon, and select My Cases in the Siebel Public Sector eService Web site.
 - b (Optional) Query to find a specific case.
 - c In the My Cases view, select the case for which you want to request an appeal.

- 2 Click Appeal Request.

The Appeal Request button is disabled if the Status field value of the case is Inactive or Submitted.

- 3 In the Request Appeal applet, enter the reason for the appeal, and click Submit.

In the Activities applet for the case, an activity record for the appeal request appears. The Type field value of the activity record is Appeal Request, and the Status field value of the activity record is Active. You cannot change or delete this activity, but an agent can change (but not delete) this activity in the Siebel Public Sector application.

- 4 If you want to include in the case a document that supports the appeal request, then add an attachment to the case for which you request the appeal.

Alternatively, you can wait until an agent accepts your appeal request, and then include the document with the new appeal case that the agent creates. For information about adding a file attachment to a case, see [Step 4](#) in “Updating Cases” on page 76.

Viewing the Status of Appeal Requests

An agent can accept or reject an appeal request in the Siebel Public Sector application. To accept the appeal request, the agent changes the Status field for the activity record associated with the appeal request from Active to Approved, the agent might enter text in the Description field of the activity record to explain the reason for accepting the appeal request, and the agent creates an appeal case for the citizen's original case. After the agent completes these acceptance tasks, the following changes occur in the Siebel Public Sector eService Web site:

- A new appeal case appears in the My Cases view.
- The Status field for the activity record associated with the appeal request changes from Active to Approved.
- The Summary field for the activity record associated with the appeal request changes to include text that the agent enters to explain the reason for accepting the appeal request.

To reject the appeal request in the Public Sector application, the agent changes the Status field for the activity record associated with the appeal request from Active to Declined. The agent also enters text in the Description field of this activity record to explain the reason for rejecting the appeal request. If the agent rejects the appeal request, then the citizen can request another appeal for the case. For more information about accepting or rejecting appeal requests for cases, see *Siebel Public Sector Guide*.

To view the status of an appeal request

- 1** If a record for the case appears in the My Cases applet on the home page of the Siebel Public Sector eService Web site, then click the hyperlink in the Case Number field of the record.

Records for the cases that are most recently created and updated appear in the My Cases applet on the home page.
- 2** If a record for the case does not appear in the My Cases applet on the home page of the Siebel Public Sector eService Web site, then complete the following steps:
 - a** Click the Side Menu icon, and select My Cases.
 - b** (Optional) Query to find a specific case.
- 3** If necessary, click the hyperlink in the Case Number field of the case to see the Activities applet for the case.
- 4** In the Activities applet, complete the following steps:
 - a** Note the value in the Status field of the appeal request.
 - If the value is Approved, then an agent accepted the appeal request.
 - If the value is Declined, then an agent rejected the appeal request.
 - If the value is Active, then an agent has not yet accepted or rejected the appeal request.
 - b** If the Status field value is Approved or Declined, then note any additional text the agent entered in the Summary field to explain the reason for acceptance or rejection.

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 83](#)
- [User Registration Process OUI Workflow on page 85](#)
- [PUB Citizen User Registration Process Workflow on page 87](#)
- [User Registration SubProcess OUI Workflow on page 87](#)
- [User Registration Forgot Password \(CX eService\) Workflow on page 89](#)
- [PUB Citizen User Registration Forgot Password Process Workflow on page 91](#)
- [OPA Integration Workflow on page 91](#)
- [OPA Integration Sub Workflow on page 92](#)
- [PUB Citizen Create Case Activity Workflow on page 94](#)
- [PUB Citizen Case Re-open Workflow on page 94](#)

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.

- 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 87](#).
- 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.

PUB Citizen User Registration Process Workflow

This workflow applies to a Siebel Public Sector eService Web site and is identical to the User Registration Process OUI workflow. For more information, see ["User Registration Process OUI Workflow"](#) on page 85.

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.

- 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 Your Password? link in the Log In applet on the home page of the Siebel eService Web site.

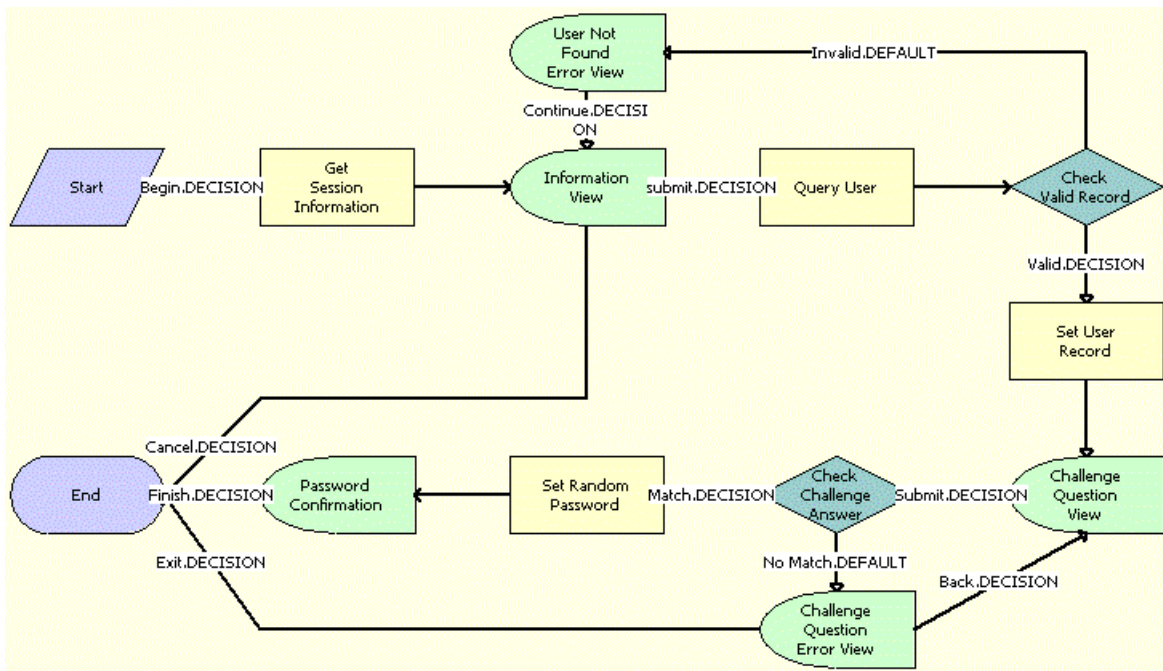


Figure 4. User Registration Forgot Password (CX eService) Workflow

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.

PUB Citizen User Registration Forgot Password Process Workflow

This workflow applies to a Siebel Public Sector eService Web site and is identical to the User Registration Forgot Password Process (CX eService) workflow. For more information, see [“User Registration Forgot Password \(CX eService\) Workflow” on page 89.](#)

OPA Integration Workflow

This workflow manages an interview session when customers determine the benefits that apply to them. [Figure 5](#) shows this workflow.

A customer calls this workflow by clicking the SCREENING FOR SERVICES link on the home page of the Siebel Public Sector eService Web site.

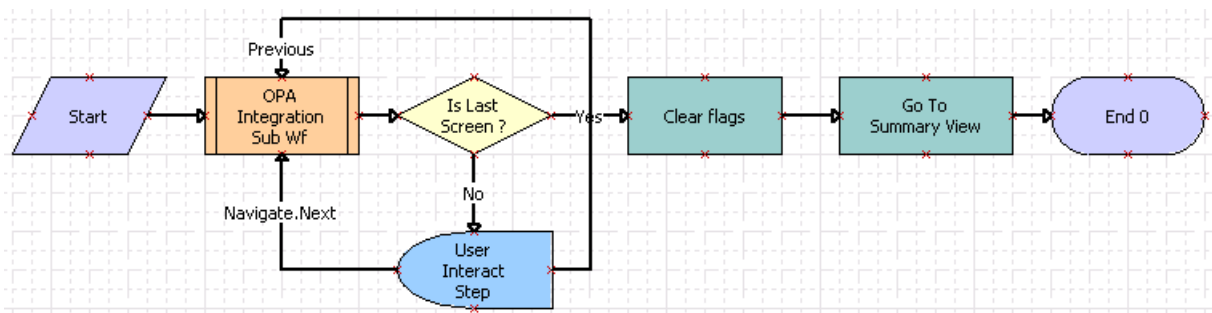


Figure 5. OPA Integration Workflow

Workflow Description. This workflow performs the following actions:

- 1 **OPA Integration Sub Wf.** This step calls the OPA Integration Sub Workflow. For more information, see [“OPA Integration Sub Workflow” on page 92.](#)
- 2 **Is Last Screen?** This step determines whether the screen that currently appears is the last screen of the interview session.

- 3 **User Interact Step.** This step determines the customer action if the screen that currently appears in not the last screen of the interview session. If the customer clicks the Next or Previous button, the workflow returns to [Step 1](#).

Developers set the User Interact View property to OPA Screen Template View. Also, developers can configure synthetic events, such as FrameEventMethodWFNavigate (for the Next button) and FrameEventMethodWFPrevious (for the Previous button). Administrators create runtime events for these synthetic events in the Administration - Runtime Events screen of Siebel Public Sector.

- 4 **Clear Flags.** This step clears all flags and information from the interview session if the screen that currently appears is the last screen of the interview session. This step calls the clearflags method in the OPA Interface Service business service.
- 5 **Go To Summary View.** This step navigates to the Summary view of the interview session. This step calls the GotoView method. For more information about this method, see *Siebel Object Interfaces Reference*.

Developers can change this view using the Summary View Name property.

OPA Integration Sub Workflow

This workflow manages the communication between an interview session for a customer and Oracle Policy Automation (OPA) by sending requests to OPA and receiving and processing responses from OPA. [Figure 6](#) shows this workflow.

The OPA Integration Workflow calls this workflow as a subprocess.

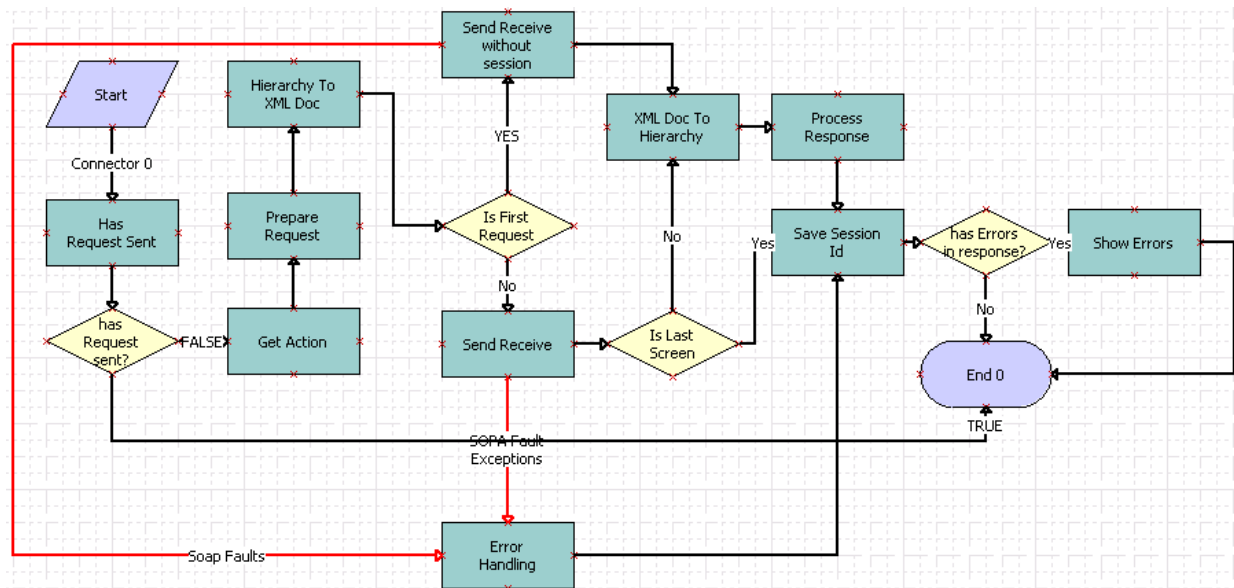


Figure 6. OPA Integration Sub Workflow

Workflow Description. This workflow performs the following actions:

- 1 **Has Request Sent.** This step evaluates whether a request was sent to OPA with the current session ID during the current interview session. This step calls the HasRequestSent method in the OPA Interface Service business service.
- 2 **has Request sent?** This step determines whether a request was sent to OPA with the current session ID during the current interview session. The workflow terminates if the request was sent.
- 3 **Get Action.** This step evaluates the user action during the interview session and obtains the appropriate action type for that action. Action types include: Start Interview, Investigate, and End Interview. This step calls the Get Action method in the OPA Interface Service business service.
- 4 **Prepare Request.** This step uses the action and the populated user data in the interview session to prepare the request to OPA. This step calls the Prepare Request method in the OPA Interface Service business service.
- 5 **Hierarchy To XML Doc.** This step converts the request from a hierarchy format to an XML format.
- 6 **Is First Request.** This step determines whether the request is the first request by evaluating the sessionId property.
- 7 **Send Receive without session.** This step sends the request without a session ID to OPA if the request is the first request. This method calls the OPA outbound Web service.
- 8 **Error Handling.** This step addresses any Simple Object Access Protocol (SOAP) fault exceptions.
- 9 **Send Receive.** This step sends the request with a session ID to OPA if the request is not the first request. This method calls the OPA outbound Web service.
- 10 **Is Last Screen.** This step determines whether the current screen is the last screen of the interview session by evaluating the Is Last Screen property.
- 11 **XML Doc To Hierarchy.** This step converts the request from XML format to hierarchy format if the current screen is not the last screen of the interview session.
- 12 **Process Response.** This step processes the response from OPA by converting the response to a flat property set and updating the flat property set into the global session. This step calls the ProcessResponse method in the OPA Interface Service business service.
- 13 **Save Session Id.** This step saves the ID of the interview session as a member variable. Subsequent requests use this variable. This step calls the CacheSessionId method in the OPA Interface Service business service.
- 14 **has Errors in response?** This step determines if the OPA response contains validation errors. The workflow terminates if the OPA response does not contain validation errors.
- 15 **Show Errors.** This step shows the error messages during the interview session if the OPA response contains validation errors and SOAP fault exceptions. This step calls the ShowErrors method in the OPA Interface Service business service.

PUB Citizen Create Case Activity Workflow

This workflow creates an activity record for a case record. [Figure 7](#) shows this workflow.

A customer calls this workflow by clicking the plus (+) icon in the Activities applet of a case record on the Siebel Public Sector eService Web site.

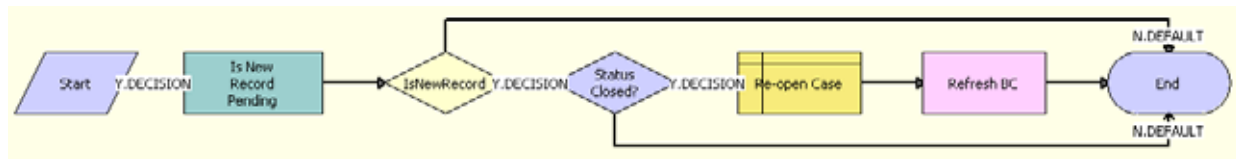


Figure 7. PUB Citizen Create Case Activity Workflow

Workflow Description. This workflow performs the following actions:

- 1 **Is New Record Pending.** This step verifies that the new activity record is pending. This step calls the Invoke BC method of the SIS OM PMT Service business service. For more information about this method, see *Siebel Order Management Infrastructure Guide*.
- 2 **IsNewRecord.** This step determines whether the new activity record is pending.
- 3 **Status Closed?** If the new activity record is pending, then this step determines whether the case is closed by checking for a Closed value in the Status field of the case.
- 4 **Re-open Case.** If the case is closed, then this step calls the PUB Citizen Case Re-open workflow. For more information, see ["PUB Citizen Case Re-open Workflow" on page 94](#)
- 5 **Refresh BC.** This step updates the business component for the case to indicate the case is now open. This step calls the Refresh Business Component method of the SIS OM PMT Service business service. For more information about this method, see *Siebel Order Management Infrastructure Guide*.

PUB Citizen Case Re-open Workflow

This workflow reopens a case. [Figure 8](#) shows this workflow.

The PUB Citizen Create Case Activity Workflow calls this workflow as a subprocess.

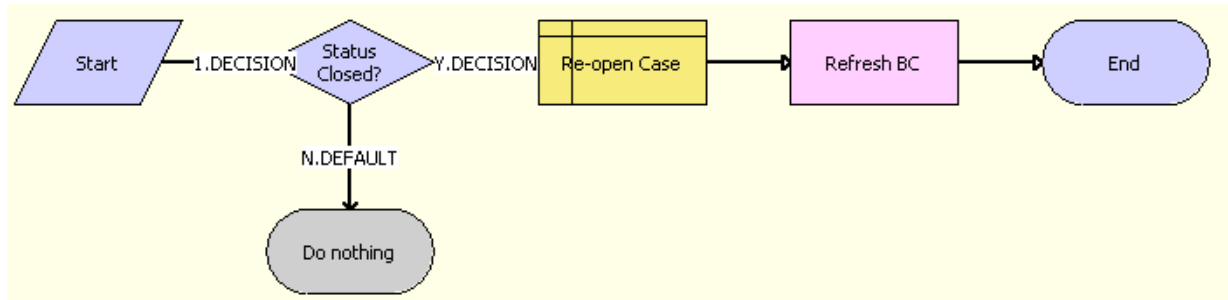


Figure 8. PUB Citizen Case Re-open Workflow

Workflow Description. This workflow performs the following actions:

- 1 **Status Closed?** This step determines whether the case is closed by checking for a Closed value in the Status field of the case. If the case is not closed, then the workflow does nothing.
- 2 **Re-open Case.** If the case is closed, then this step opens the case again by changing the Closed value in the Status field to Active.
- 3 **Refresh BC.** This step updates the business component for the case to indicate the case is now open. This step calls the Refresh Business Component method of the SIS OM PMT Service business service. For more information about this method, see *Siebel Order Management Infrastructure Guide*.

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