Siebel Briefings Administration Guide

Siebel Innovation Pack 2015
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Chapter 6:   Administering Siebel Briefings

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1 What's New in This Release

What's New in Oracle's Siebel Briefings Administration Guide, Siebel Innovation Pack 2015

No new features have been added to this guide for this release. This guide has been updated to reflect only product name changes.

NOTE: Siebel Innovation Pack 2015 is a continuation of the Siebel 8.1/8.2 release.

2 Getting Started with Siebel Briefings

This chapter describes the requirements that must be completed before you can use Oracle's Siebel Briefings.

Briefings Installation Requirements

Before you can use Siebel Briefings, the software listed in Table 1 must be correctly installed, and the Siebel File System set up.

Table 1.   Required Software

Software	Reference
Siebel Gateway Name Server	See *Siebel Installation Guide* for the operating system you are using.
Siebel Server	
Siebel Database Server	
Siebel Tools or Siebel Developer Web Client	
Siebel Mobile Web Client	
Siebel Business Applications	Application-specific administration guide, the *Siebel Applications Administration Guide*, and this guide.

3 Understanding Siebel Briefings

This chapter describes Siebel Briefings architecture, the four types of briefing documents used to deliver Briefings information, and content services. It includes the following topics:

Siebel Briefings Architecture

Users can access Siebel Briefings using a standard Web browser. Siebel Briefings accesses servers outside the company's firewall to provide users with information from external content providers. Figure 1 shows the Siebel Briefings architecture. The illustration shows a Web browser that connects to a Web server. The Web server connects to the Siebel Gateway Name Server, which in turn connects to the other Siebel servers. The Siebel servers are connected to a database and, through the Internet, to content services.
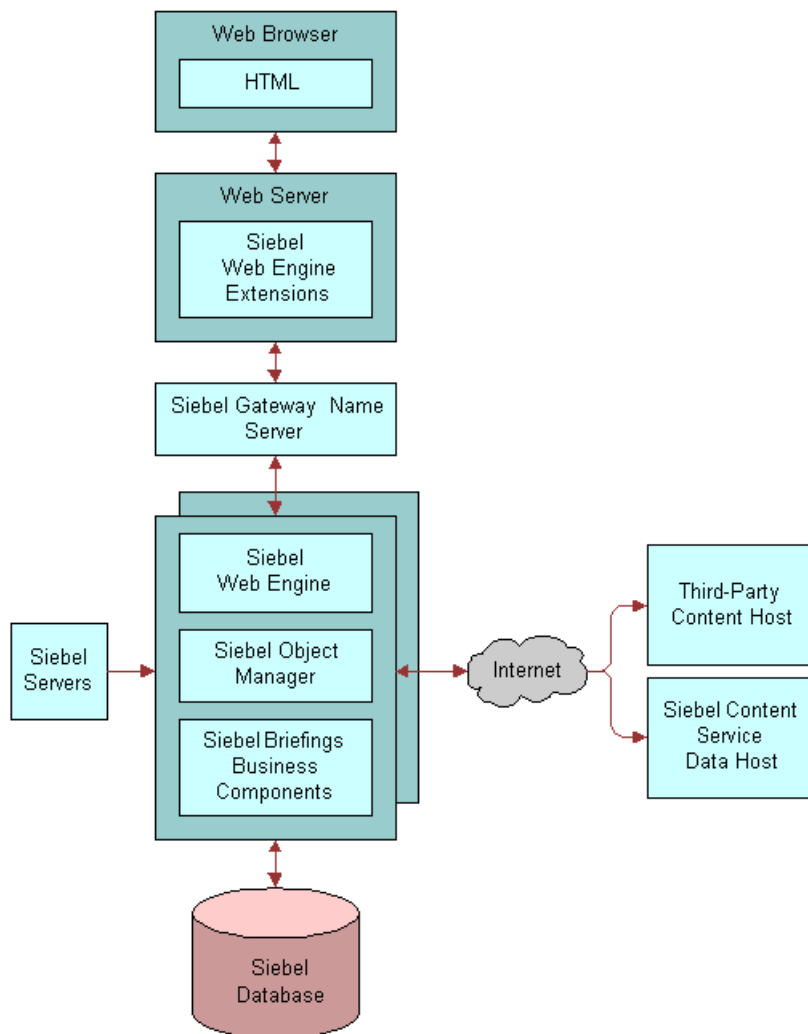
Figure 1.   Siebel Briefings Architecture

For more information, see the *Siebel Installation Guide* for the operating system you are using.

About Siebel Briefings

Siebel Briefings is a knowledge management tool that is designed to help your employees and partners be more effective in acquiring and retaining customers.

Using Briefings, sales, marketing, and service professionals can access relevant business information about customers, prospects, markets, and competitors. Siebel Briefings aggregates Siebel data, news articles, company profiles, marketing literature, and other external data in Briefing documents. Information from outside your company is presented in the context of front-office data. For example, an Account Briefing contains information from your Siebel database, such as opportunities and service requests, as well as recent news articles about that account.

Briefing documents provide one-click access to business applications and external content sources. Users can get more detailed information by drilling down from Briefing documents into other modules in their Siebel application, and they can click hyperlinks to navigate to external Web sites.

Siebel Briefings delivers business information in four types of Briefing documents.

■ **About My Briefing.** Provides business information that can be customized by the user.

■ **About Account Briefing.** Provides customer information including recent news, detailed company profiles, relevant opportunities, service requests, quotes, activities, and the account team.

■ **About Competitor Briefing.** Provides a summary of competitor information, including recent news, a detailed company profile, product information, and recommended literature.

External, Web-based sources can be configured to integrate with Briefings.

About My Briefing

My Briefing provides access to timely business information that can be personalized by the user. My Briefing can include new opportunities, accounts, calendar items, service requests, news, expense report status, company announcements, literature from the Siebel Encyclopedia, Web clips, and links to useful Web sites. The information in My Briefing is personalized for each user based on responsibilities and preferences set in the user's tracking profile.

For more information on tracking profiles, see "Tracking Profile" on page 16.

My Briefing Internal Data Sections

Table 2 describes the My Briefing sections that display data from the Siebel database. The search and sort specifications for internal sections are defined in the predefined query My Briefings.

For more information about predefined queries, see "Predefined Queries for Briefings" on page 47.

Table 2.   My Briefings Internal Sections

Section	Description	Controlled by Tracking Profile
My Opportunities	Lists the user's opportunities created within the last year (365 days).	No
New Bulletins	Alerts users of important company announcements. Broadcast messages defined using the Administration - Communications screen, then the Message Broadcasts view. Messages that are created between the activation and expiration dates and designated for Siebel Briefings appear as bulletins in this section. Messages are sorted by creation date and then by abstract.	No
My Calendar	Lists activities that are not marked as done, canceled, or declined. This includes today's activities, pending activities, and overdue activities. The calendar can appear in daily, weekly, or monthly format. Users can view and maintain their own appointments as well as view calendars of team members who have granted access.	No
Expense Reports	Shows the user's expense reports that have not been marked as paid. Expense reports are sorted by creation date.	No
New Service Requests	Shows all open or pending service requests associated with the accounts to which the user is assigned and that were created within the past year. Service requests are sorted by status and then by severity.	No
New Accounts	Lists all accounts to which the user is assigned and that are marked new. Accounts are sorted by name.	No
New Contacts	Lists contacts created within the last year to which the user is in the access list as a secondary user. Contacts are sorted by Last Name. A secondary user is one who has been granted access to the record, but did not create the record.	No
Products	Lists new products.	No
Literature	Shows links to literature items in the Siebel Encyclopedia for topics defined on the user's tracking profile. The active date must be between the release and expiration dates.	Yes

Table 2.   My Briefings Internal Sections

Section	Description	Controlled by Tracking Profile
Recommended Links	Shows links to recommended Web pages. Recommended links are defined as literature items in the Siebel Encyclopedia. The literature type is Recommended Link, and the Web display method is anything other than In-Line.	Yes
Web Clips	Shows the target Web page of a recommended link in-line with other sections. Web clips are recommended links defined in the Siebel Encyclopedia with a Web display method of In-Line.	Yes

About Account Briefing

Account Briefings help users prepare for customer calls by keeping them informed about aspects of customer accounts. An *Account Briefing* is a single Web page that summarizes interactions with the customer and includes news and profile information about the account. Users can also access related literature in the Siebel Encyclopedia, such as presentations, brochures, and recommended links.

Users can access Account Briefings from several views. Each view provides the user with a different subset of account records.

■ **My Tracked Accounts.** Lists the accounts users have selected on their tracking profiles.

■ **My Accounts.** Lists those accounts to which the user has been assigned to the account team.

■ **My Team's Accounts.** Lists the user's accounts and those accounts for which the primary sales team member is a direct subordinate of the user.

■ **All Accounts.** Lists all accounts to which the user has access based on visibility rules.

NOTE: Access to views is based on each user's responsibilities. Not all users have the views listed above. For example, only managers typically have access to My Team's Accounts. For more information about responsibilities and views, see the *Siebel Security Guide*.

Account Briefing Sections Displaying Siebel Data

Table 3 describes the Account Briefing sections that display data from your Siebel database. The search and sort specifications for internal sections are defined in the predefined query named Account. For more information about predefined queries, see "Predefined Queries for Briefings" on page 47.

Table 3.   Account Briefings Siebel Data Sections

Section	Description
Header	Shows the name of the current company and a link to the company's home page. It also contains an Edit Layout button that allows users to modify the layout of the Account Briefing.
Table of Contents	Shows Account Briefing sections. Sections that contain available data appear as hyperlinks.
Opportunities	Shows account opportunities created in the last 30 days. Opportunities are sorted by revenue and then by probability percentage of the primary user.
Service Requests	Shows the service requests related to the account. Service requests are sorted by status and then by creation date.
Contacts	Shows contacts related to the account that were created within the last 30 days. Contacts are sorted by last name and then by first name.
Activities	Shows account activities for the last 30 days. Activities are sorted by type and then by description.
Quotes	Shows quotes related to the account. Quotes are sorted by end date. Quotes that are less than 30 days old are displayed.
Service Agreements	Shows service agreements related to the account. Service agreements are sorted by end date. Service agreements that are less than 30 days old are displayed.
Account Team Members	Shows employees who are on the sales team for the account.
Literature	Shows links to literature items in the Siebel Encyclopedia related to the account. The active date must be between the release and expiration dates.
Recommended Literature	Shows links to literature items in the Siebel Encyclopedia related to the account. The current date must be between the release and expiration dates.
Recommended Links	Shows links to recommended Web pages. Recommended links are defined as literature items in the Siebel Encyclopedia. The literature type is Recommended Link, and the Web display method is not In-Line.
Web Clips	Shows a Web page related to this account in-line with other sections. Web Clips are recommended links defined in the Siebel Encyclopedia with a Web display method of In-Line.

About Competitor Briefing

The Competitor Briefing helps employees stay informed by gathering information about competitors. It provides them with current market information, product information, company information, a list of corporate affiliations, and access to related literature from the Siebel Encyclopedia.

Users access Competitor Briefings using one of the two following views:

■ **My Tracked Competitors.** Lists the competitors that users have selected in their tracking profiles.

■ **All Competitors.** Lists all competitors to which the user has access based on visibility rules.

Competitor Briefing Sections Displaying Siebel Data

Table 4 describes the Competitor Briefing sections that display data from the Siebel database. The search and sort specifications for internal sections are defined in the predefined query named Competitor. For more information about predefined queries, see "Predefined Queries for Briefings" on page 47.

Table 4.   Competitor Briefing Siebel Data Sections

Section	Description
Products	Shows a list of competitor products sorted by name.
Competitive Literature	Shows literature from the Siebel Encyclopedia that is associated with the competitor. Competitive Literature is sorted by sales tool type and then by name.
Recommended Literature	Shows links to literature items in the Siebel Encyclopedia related to the competitor. The active date must be between the literature item's release and expiration dates. Literature is sorted by sales tool type and then by name.
Recommended Links	Shows links to recommended Web pages. Recommended links are defined as literature items in the Siebel Encyclopedia. The literature type is Recommended Link, and the Web display method is not In-Line.
Web Clips	Shows a Web page related to this competitor in-line with other sections. Web clips are recommended links defined in the Siebel Encyclopedia with a Web display method of In-Line.

Additional Briefings Features

Siebel Briefings includes several key features that provide users with relevant business information. These features include:

■ My News Topics on page 16

■ Tracking Profile on page 16

■ Edit Layout Preferences on page 17

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My News Topics

Users can create ad-hoc custom news topics that are displayed on their My Briefings page. Users select My News Topic from the drop-down list of the Briefings screen, and then click the User-Defined tab. A full-text expression can be entered and articles containing that expression are tracked. For example, if the expression software is entered, news articles reflecting this industry and product segment are displayed on the My News section of the My Briefings page.

In the My News Topic view, users can also customize the layout of the articles, the number of headlines displayed for each tracked topic, and the number of days the search topic is active.

Tracking Profile

The tracking profile allows users to control much of the information that appears in the My Briefing document. Users choose the topics that they want to track. Only the information related to the selected topics appears in the My Briefing document. This allows users to filter out information that is not relevant to their interests and responsibilities.

The tracking profile allows users to select:

- Accounts
- Competitors
- Industries
- Products
- News topics

After the user selects specific accounts, news, literature from the Siebel Encyclopedia, recommended links, and Web clips related to these accounts appear in the user's My Briefing page.

The tracking profile controls the following sections of the My Briefing document:

- Account/Competitor News
- Literature
- Recommended Links
- Web Clips
- My News

Edit Layout Preferences

Users can personalize the applets displayed on Briefing pages and choose their preferred layout. Users can either use the buttons above each applet or click on the Edit Layout button on each briefing page.

The Content Selection and Layout view, shown in Figure 2, allows users to see the order of applets and whether they are displayed or hidden. This view also allows users to display applets, reposition applets, and to return the page layout to the default setting. The Content Selection and Layout view is available by clicking the Edit Layout button at the top of the briefing pages.

Figure 2.   Content Selection and Layout View

Layout preferences are stored as part of the user profile and are independent of the client computer being used.

Bulletins

Bulletins are internal company broadcast messages that alert users to important internal events and announcements from your company. Bulletins appear in the New Bulletins section of users' My Briefings documents. Users see bulletins that are associated with their user name or division, or those that are broadcast to the entire organization. Typically, bulletins are generated by a system administrator or designated employees who have privileges to publish bulletins.

For more information about creating Bulletins, see "Publishing Briefings Bulletins" on page 45.

Siebel Search

Users can search the Siebel database by clicking the search button (binoculars icon) in the upper-right area of any window. Table 5 summarizes the types of data and searchable fields.

Table 5.   Siebel Search

Search Target	User Entry	Siebel Search Results
Accounts	Account Name	Accounts in the user's organization
Contacts	Last Name	All contacts
Employees	First Name or Last Name	All employees
Literature	Name, Description, or Author	All literature in the Siebel Encyclopedia
Opportunities	Name	Opportunities that are visible to the sales representative
Service Requests	Service Request Number	All service requests in the user's organization

Recommended Links

Recommended links are hyperlinks that appear in Briefing documents. They are links to recommended Web sites defined and published by a marketing administrator. Administrators define and publish recommended links using the Administration - Document screen's Literature view. Recommended links are stored in the Siebel Encyclopedia.

For information about how to publish recommended links, see "Publishing Literature, Web Clips and Recommended Links in Briefings" on page 41.

Web Clips

Web clips are static Web pages displayed in Briefing documents. Marketing administrators define and publish Web clips using the Administration - Document screen's Literature view. Web clips are stored in the Siebel Encyclopedia as a specialized type of recommended link.

For information about how to publish Web clips, see "Publishing Literature, Web Clips and Recommended Links in Briefings" on page 41.

4 Configuring Siebel Briefings

This chapter describes how to configure Oracle's Siebel Briefings to implement specific features. It includes the following topics:

- Process of Configuring Siebel Briefings on page 19
- Configuring My Briefing as the Default Home Page on page 19
- Adding D&B User Credentials on page 20
- Setting Up Drill-Down Destinations on page 21

Process of Configuring Siebel Briefings

This topic lists the procedures that an administrator might follow to configure Siebel Briefings. Your company might follow a different process according to its business requirements.

1 Configuring My Briefing as the Default Home Page on page 19
2 Adding D&B User Credentials on page 20
3 Setting Up Drill-Down Destinations on page 21

Configuring My Briefing as the Default Home Page

Users may wish to make My Briefing the default home page for their Siebel base application, rather than using the home page that comes with the base application. The My Briefing page displays data from your company's Siebel database in context with customized news and information from external sources. This functionality is not available from the preconfigured home page. Using Siebel Tools, you can configure your application to default to My Briefing as the home page. The following steps illustrate how to do this configuration, using an example in which your base application is Siebel Sales.

You must replace the default Home Screen with the SI Briefings Screen to display the My Briefing page. For example, in Siebel Sales, the home page defaults to the Web Sales Home Screen. For more information, see *Using Siebel Tools*.

This task is a step in Process of Configuring Siebel Briefings on page 19.

To make My Briefings the home page for users

1 Start Siebel Tools and navigate to your base application.

For example, Application Siebel Sales Enterprise.

2 Select the Home Screen.

For example, select Web Sales Home Screen.

3 Change the Home Screen to SI Briefings Screen.

4 Step off the record to save your changes.

5 Compile and test the Siebel Repository File (SRF).

To implement this change, the new SRF must be released to the Siebel server and to any users that are running the local client on their computers. For more information, see *Using Siebel Tools*.

Adding D&B User Credentials

In addition to D&B Company Profiles provided by Siebel Briefings, Oracle and D&B offer a co-branded Web site that allows Siebel customers access to the D&B detailed business and credit reports through their Siebel application. These reports include Business Background Reports, Financial Profiles, Payment Analysis Reports, and Supplier Evaluations.

Siebel customers have two options for providing users with access to D&B business and credit reports.

■ **Credit card access.** The default option requires the user to enter credit card information for payment.

■ **Contract access.** This option requires that the customers sign a contract with D&B. Customers are given login credentials to use each time they order D&B reports, and the price of the report is billed against the contract.

If your company has a contract with D&B to purchase these reports, you can configure your Siebel Briefings application to allow users contract access to the D&B company report site. This allows your employees to click a D&B link in the Additional Information section of Briefing documents and enter the D&B Report site with contract access.

This task is a step in .

To enable contract access to the D&B report Web site

1 Navigate to the Administration - Integration screen < WI Symbolic URL List view.

2 From the visibility filter, choose Symbolic URL Administration.

3 In the Symbolic URL Administration list, select the AccountAdditionalInfo symbolic URL, and supply the URL Arguments, as described in the following table.

Field	Comments
DNB Link	Specify *Contract* as a value.
DNB Password	Enter the password from the login credentials issued by D&B.
DNB User	The value is the user name from the login credentials issued by D&B.

4 Repeat the above steps for the CompanyAdditionalInfo symbolic URL name.

When users click the D&B link that appears in Account, Competitor, or Company Briefings, they enter the D&B Company Report site with contract access.

For more information about D&B reports and services, see *Siebel Applications Administration Guide*.

Setting Up Drill-Down Destinations

Siebel Briefings allows users to drill down on hyperlinks in Siebel Briefings views (My Briefing, Account Briefing, Competitor Briefing, and Company Briefing) to navigate to other views. For example, a user reviewing his or her opportunities listed on the My Briefing page can click the name of the opportunity and navigate to the Opportunity view.

To enable this behavior, a Siebel-Briefings-specific screen contains all views that are drill-down destinations from any Siebel Briefings applet. This is a hidden screen that is not exposed to users.

If you add or modify applets to Siebel Briefings views and you want users to be able to drill down from the applet to another view, you must include the destination view on this screen. The name of the screen is SI Drilldown Destinations Screen. See *Using Siebel Tools* and *Siebel Installation Guide* for the operating system you are using for information on how to include the destination view to the Briefings screen.

This task is a step in .

Requirements for Setting Up Drilldown Destinations Screen

To enable a drill-down destination, the following criteria must be met:

■ The source applet must be based on one of these specialized frame classes:

   ■ CSSFrameListFCDdn

   ■ CSSFrameListNoData

   ■ CSSFrameUrl

■ A drill-down object must exist as a child of the source applet with a valid View attribute (the destination view).

■ The destination view must be included in the license key for your installation.

■ The destination view must be included in the Responsibility for the logged in user.

■ The destination view must be included as a Screen View in the SI Drilldown Destinations Screen.

5 Integrating External Content

This chapter describes how to use Siebel Briefings Content Broker to integrate external content. The chapter also describes the process for configuring Briefings to display data and information from other external sources. This chapter assumes that you are familiar with Siebel Tools and with configuring Siebel applications.

For more information about Siebel Tools and Siebel configuration concepts, see *Using Siebel Tools*. For more information about configuring Siebel applications, see *Siebel eSales Administration Guide*.

This chapter includes the following topics:

About Content Broker

Content Broker is a Siebel Briefings feature that allows you to integrate and display content from any external source that is properly configured. This content appears in context with your Siebel data.

For example, when a user opens an Account Briefing for an account such as Acme, Inc., in addition to account data from their Siebel database—opportunities, contacts, service requests—the user also sees recent news articles related to Acme, Inc. Content Broker searches external sources, finds information related to Acme, and displays it in context with Acme data from the Siebel database.

Content Broker consists of three components:

■ **The Account Topic Manager.** This Administration - Briefings screen view allows you to link accounts and competitors to topics. Content Broker uses topics to search external content sources. Siebel has adopted the D&B D-U-N-S Number as the topic identifier for companies. When you link accounts and competitors to topics, you associate them to the D-U-N-S Number. Siebel Briefings uses the D-U-N-S Number when searching external content sources.

For more information on using the Account Topic Manager, see "Associating Accounts with Briefings Topics" on page 39.

■ **Content Agents.** Content agents are used to specify the authentication, URL, and syntax parameters required when requesting information from external sources. You can create your own content agents for other external content sources. For more information on content agents, see "Content Agents and Requests to External Content Sources" on page 27.

■ **Siebel Company Vocabulary.** Oracle's Siebel hosts this database of company identifiers based on D&B D-U-N-S numbers. For each =D-U-N-S Number in the Company Vocabulary table, Oracle also maintains other company identifiers, such as the stock ticker symbol for public companies. Figure 3 shows a conceptual view of the Siebel Content Broker.

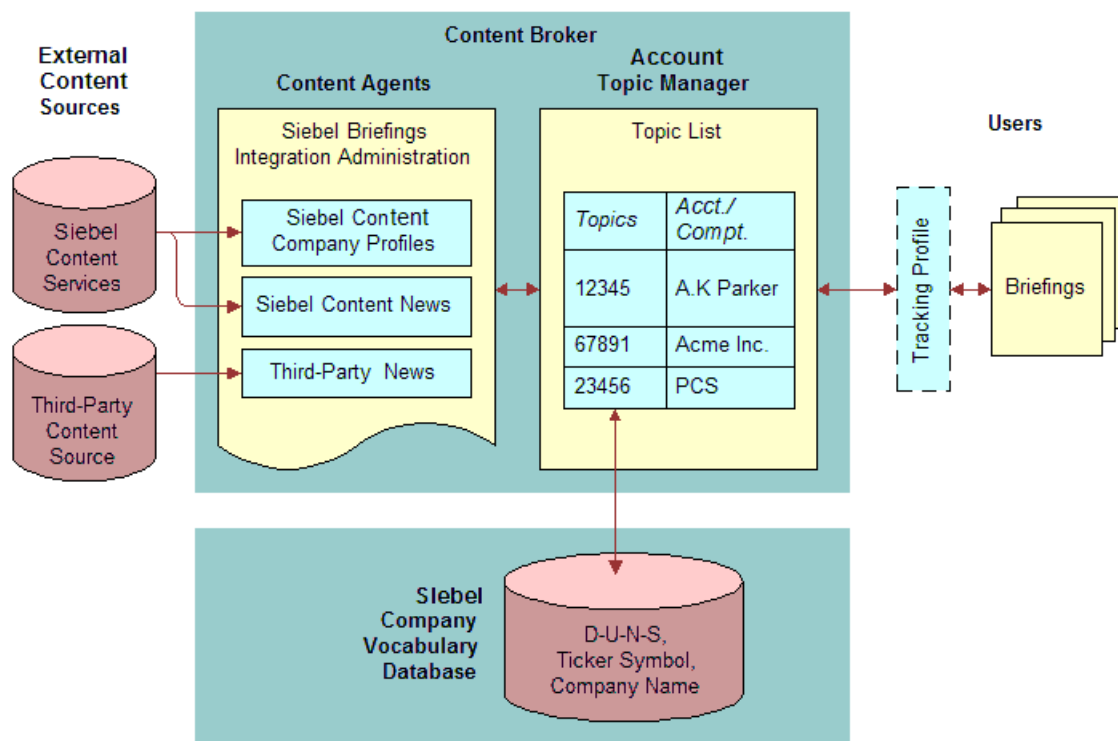Figure 3.   Content Broker Architecture

Using Content Broker you can define content agents and use Siebel Tools to configure Siebel Briefings objects that request data from external sources. Defining content agents in the Administration - Integration screen views gives you the flexibility to change the agents without having to recompile the Siebel repository (.srf) file or reboot the server.

Content Agents for Company Vocabulary

Siebel Company Vocabulary is a database of company identifiers based on D&B's D-U-N-S Number. By linking the accounts and competitors in your Siebel database to D-U-N-S numbers, you also gain access to other identifiers, such as the stock ticker symbol. This allows you to create content agents that can use these company identifiers when submitting requests to external content providers. This vocabulary configuration scenario is described in "Briefings Configuration Scenarios" on page 30.

For example, suppose that the third-party content provider in Figure 4 on page 26 is NewsEdge Corporation. Suppose also that NewsEdge Corporation indexes company information by stock ticker symbol.

You could build a content agent that would pass the D-U-N-S Number to the Siebel Company Vocabulary host. It would pass along with it the URL that you plan to send to NewsEdge. The NewsEdge URL is sent along as an argument and it is formatted to include search terms from the company vocabulary database.

After the Siebel Company Vocabulary host receives the request, the content agent retrieves the corresponding stock ticker symbol and then includes the stock ticker symbol in the NewsEdge URL. The NewsEdge URL is then sent back to your server.

The content agent evaluates whether to display a link to NewsEdge or to submit a request to NewsEdge for an HTML document. If it is a link, the link is built into a Briefing document. If it is HTML, an HTTP request is sent to NewsEdge. Then NewsEdge returns the requested HTML, and it is displayed in a Briefing page.
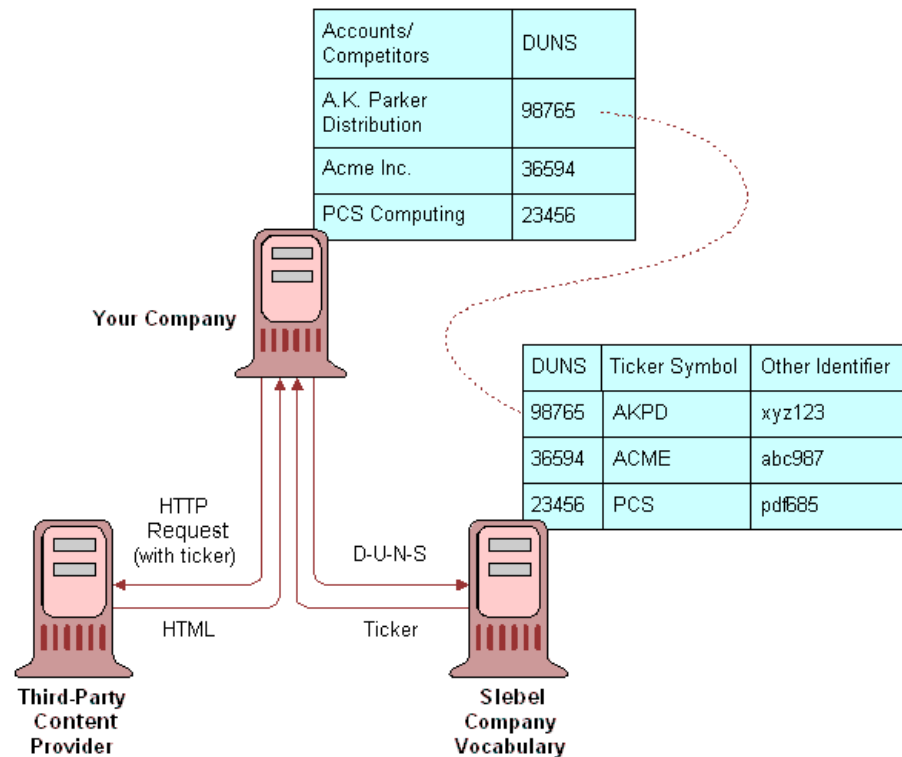
Figure 4.   Content Agent for the Company Vocabulary

For more information about linking D-U-N-S numbers to accounts and competitors, see "Associating Accounts with Briefings Topics" on page 39.

To define a content agent that retrieves data from the Siebel Company Vocabulary database, you must define the following:

■ URL to the Siebel Company Vocabulary host

GetIncludedURL

■ An argument representing the D-U-N-S Number from the Siebel database:

Arg:MID=MID

■ An argument representing the URL to your external content source, including:

■ Tokens for the values you want to insert. For example:

{TICKER}

■ Authorization credentials

- Other arguments

  For example:

  ```
  Arg:URL = http://demofour.newsedge-web.com/NewsEdge/
  Headlines?SrchInput={TICKER}&Username=demo&Password=demo
  ```

- A value for Arg:INCLUDE:

  ```
  1 = HTML
  ```

  ```
  0 = Link to HTML page
  ```

- If the value of Arg:INCLUDE is 0, then add a value for Arg:LINKTEXT.

Content Agents and Requests to External Content Sources

Content agents specify the authentication, URL, and syntax parameters required to submit requests to an external content source. These parameters are defined using the three Administration - Integration screen views:

- **Host Administration.** This view allows you to specify the name of an external host, its virtual name, the authentication type, and the credentials that are used to access the host. You specify the credentials in the Authentication Value field as *username:password*.

- **Symbolic URL Administration.** This view allows you to define the names of symbolic URLs that are used to request information from external content hosts. Using this view, you can also define the syntax, arguments, and required arguments for the content search. The symbolic URL name is defined as the calculated value of the business component's field. See "Configuring a Business Component to Allow External Data for Briefings" on page 31.

- **Fixup (Content) Administration.** This view allows you to define the link target and the view that displays the link. For example, you can control how content is displayed, such as inside an applet. The Content Fixup Name updates a relative link with the server name and other necessary information.

How Business Components Map to Content Agents

Business components refer to content agents when making requests to external content sources, using the calculated value of the business component's field.

Figure 5 shows the fields and calculated values for the SI Account External business component. The CompanyNews field contains the calculated value AccountNews.

Figure 5.   SI Account External Business Component Field Properties

As Figure 6 shows, the AccountNews is the same as the Symbolic URL name defined in the Administration - Integration screen, then the Symbolic URL Administration view. The calculated value of the business component's field matches the name of the symbolic URL. The Symbolic URL Administration view stores the information that the Web Integration Business service uses to build an HTTP request to an external content host.
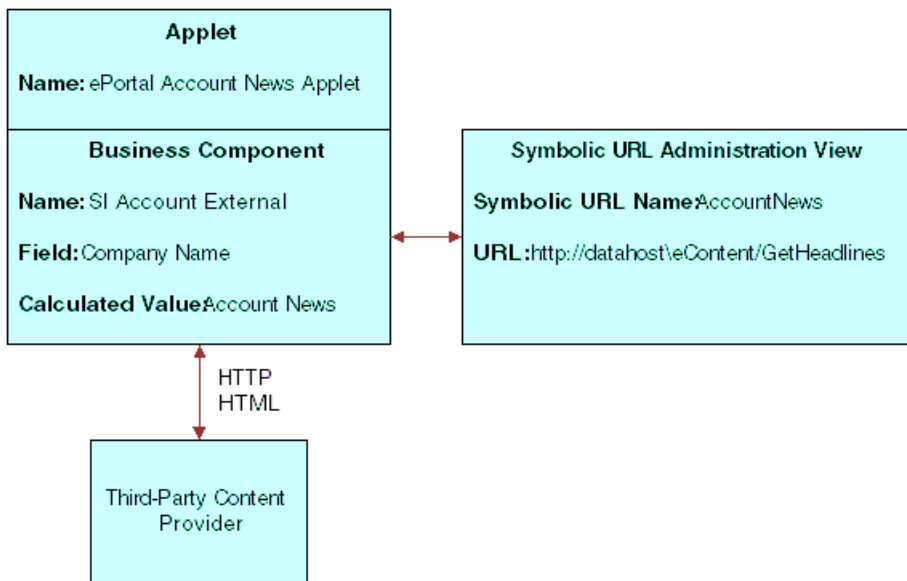
Figure 6.   Relationship Between Business Components and Content Agent

Process of Integrating External Content

This topic describes the tasks typically performed by an administrator when integrating external content. Your company may use a different process depending on your requirements.

1   Configuring a Business Component to Allow External Data for Briefings on page 31

2   Configuring an Applet to Display External Data for Briefings on page 32

3   Mapping an Applet and Web Template to a Briefings View on page 34

4 Defining Content Agents for Briefings on page 36

Overview of Configuration for Briefings External Data Integration

This section describes some issues you should consider before you begin configuration, and provides an overview of common configuration scenarios. It includes the following topics:

■ Briefings Configuration Scenarios on page 30

■ Briefings Configuration Example on page 31

To integrate external content into the Siebel Briefings application, you must configure applets and business components so that they can accommodate external content using Siebel Tools and define the content agent using the Administration - Integration screen views in Briefings.

There are four primary configuration tasks:

■ Configuring a Business Component to Allow External Data for Briefings on page 31

■ Configuring an Applet to Display External Data for Briefings on page 32

■ Mapping an Applet and Web Template to a Briefings View on page 34

■ Defining Content Agents for Briefings on page 36.

Generally, copying existing objects in Siebel Tools and modifying them to suit your purposes is preferable to creating new objects. Copying and modifying existing objects allows you to use as much preconfigured functionality as possible. Figure 7 illustrates the process of integrating external content.
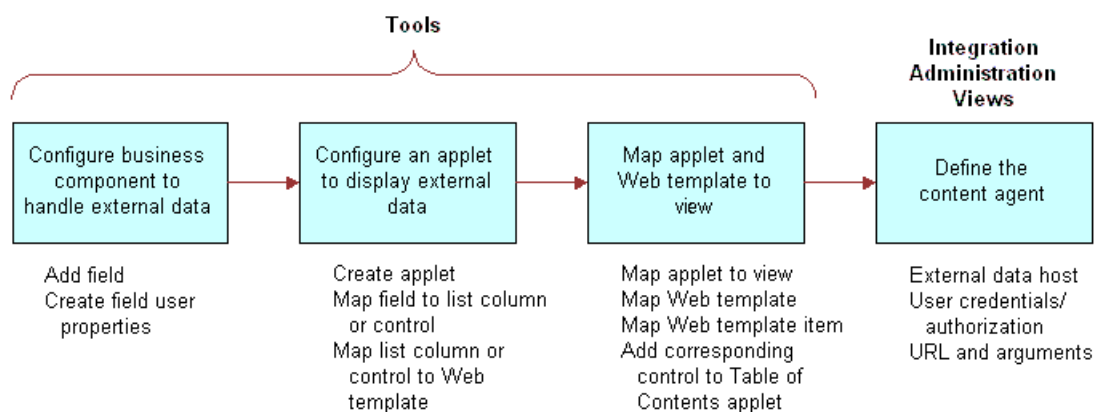

Figure 7.   Content Integration Process

Before You Begin Configuration

Before you begin configuration tasks, verify the following requirements:

■ Your external content provider must have an HTTP/HTML interface.

■ You need to know the search terms and any other parameters to pass to the content source to retrieve data. For example, does your content source index company information by D-U-N-S Number, stock ticker symbol, or company name?

■ You must define the data you want to display and where you want it to appear. For example, do you want to display headlines on the user's My Briefings page, or do you want to display headlines and abstracts of articles on the Account Briefing?

Briefings Configuration Scenarios

There are three scenarios that characterize how you might integrate external content into your Siebel Briefings application. Each scenario describes the type of request that Content Broker places when retrieving data from an external source. The scenarios are listed here in order of complexity. Static is the least complex, and vocabulary is the most complex.

■ **Static.** In this scenario, Content Broker places a static request to an external content host and displays the results in a section of a Briefing document. The elements of the request do not change, and no data from the Siebel database is required.

For example, suppose your organization wants to display current headlines about the high-tech industry on users' My Briefing pages. You could configure Siebel Briefings to search an external data host, for example, TopNews.com, for articles using the search term *high-tech* and limit the search to articles published in the last five days. The results could be displayed in a new section called High Tech News.

■ **Parameters.** In this scenario, when Content Broker places a request to an external data host, it passes data from your Siebel database as a parameter. Siebel data might include the company name, SIC code, or company's address.

For example, suppose your organization purchases news from an external content host that uses the SIC code as an index. You want to display account news from this source on Account Briefings. You could configure Siebel Briefings so that the SIC code for the current account is extracted from the Siebel database and is passed to the content source when the request is made.

■ **Vocabulary.** In this scenario, search terms from the Siebel Company Vocabulary database are retrieved and then passed to the external content host when the request is made.

For example, suppose your organization already subscribes to a news wire called Headline News, and wants to integrate Headline News into the Account Briefing. Headline News indexes company information by stock ticker symbol. Your organization could configure Siebel Briefings to extract the stock ticker symbol for the current account from the Siebel Company Vocabulary database and pass it to the content host when the request is made.

Briefings Configuration Example

The following example is used to illustrate the process of integrating external content into the Siebel Briefings application.

An organization subscribes to news from Top News Corporation and wants to integrate it into its Siebel Briefings application by placing a Top News section on the Account Briefing. Top News indexes company news by D-U-N-S Number. The organization stores a D-U-N-S Number for each account in the Siebel database. As an administrator, you must configure the application to extract the D-U-N-S Number for the current account and pass it to the content host when the request is made.

This method of configuration uses parameters, as described in "Briefings Configuration Scenarios" on page 30.

Figure 8 shows a sample external data section. This section is configured to display content from Lexis-Nexis. The organization would configure a similar section to display content from Top News.

Figure 8.   My News Section

Configuring a Business Component to Allow External Data for Briefings

External content appears in Siebel Briefings application in applets. Applets contain list columns or controls that are mapped to fields in specialized business components. These fields do not represent structured data like records from an RDBMS. Rather, each field represents the HTML results that are sent by an external content provider and displayed in an applet. The first step in integrating external content is to add a new field that represents HTML results to a business component.

Adding a New Field to a Business Component

The following procedure describes how an organization can include the Top News section to Account Briefings. The administrator starts by adding a field to the SI Account External business component. This is a custom field that represents the HTML results sent by TopNews.

NOTE: To minimize configuration work, copy an existing field that is already configured to handle external data, and then modify its properties.

To add a field to a business component and define field properties

1 Start Siebel Tools.

2 Select Business Component in the Object Explorer.

3 Query for SI Account External.

4 Copy the Field CompanyNews.

5 Rename the field as TopNews to represent external data, and then define the field properties.

The following table describes the key field properties related to Siebel Briefings.

Property	Example Value	Comments
Name	TopNews	Defines the name of the field.
Calculated	4	A check mark in this field indicates that it is a calculated value.
Calculated Value	AccountNews	Maps the business component to the content agent defined in the Administration - Integration screen views.
Column		Leave this field blank.
Join		Leave this field blank.
Multi Value Link		Leave this field blank.

Configuring an Applet to Display External Data for Briefings

To display external content on a Siebel Briefings view, you must create an applet based on the business component that contains the specialized field for handling external data. See "Configuring a Business Component to Allow External Data for Briefings" on page 31.

You can configure the applet so that it does not display when data is not available. After you create the applet, you map the applet to a Web template, and then define the Web template items.

For example, you can create a new applet by copying the ePortal Account News applet and renaming the applet TopNews.

To configure an applet

1 Create a new applet and define its properties.

The following table describes the key properties for Siebel Briefings.

Property	Example Value	Comments
Business Component	SI Account External	Applet should be based on the business component that has been configured to handle the external data.

2 Add the user properties, described in the following table, to hide the applet when no data is available.

This feature is supported by applets with Class = CSSFrameListWeb.

Name	Value	Comments
NoDataHide	Y	If no data is associated with the applet, the applet does not appear on the view.
NoDataRequiredFields	TopNews	The value of this user property must match the name of the field added to the business component.

3 Add or modify the list column attributes.

The list column Field attribute must match the name of the field defined on the business component. For example, if TopNews is the name of the field you defined in the SI Account External business component, you would create a list column with a field attribute set to TopNews.

The following table describes the key list column attributes for Siebel Briefings.

Property	Example Value	Comments
Display Name	Top News	The value that displays in the user interface.
Field	TopNews	The value in this field matches the name of the field defined on the business component.
HTML Display Mode	DontEncodeData	This property must be set to DontEncodeData. Otherwise, the Siebel Web Engine tries to encode HTML results.
Name	TopNews	The name of the field defined on the business component.
Field Retrieval Type	Symbolic URL	The value is equal to Symbolic URL.

4 Associate the applet with a Web template.

The Web template used by Siebel Briefings for applets displaying external content is:

```
ePortal Url Applet
```

5 Define the Web template items.

The Web template item should match the list column property on the applet.

The following table describes the key Web template properties for Siebel Briefings.

Property	Example Value	Comments
Item Identifier	501	Maps to <swe:control> tag in the Web template (.swt file).
Name	TopNews	This value should match the name of the list column or control on the applet.

Mapping an Applet and Web Template to a Briefings View

Account, Competitor, and Company Briefings have a table of contents that lists the applets that appear on the page. Applets that contain data are displayed in the table of contents as hyperlinks. Applets that do not contain data are listed in the table of contents but are not displayed as hyperlinks.

The table of contents applets for the Account, Company, and Competitor Briefings are named:

■ SI Account TOC Applet

■ SI Company TOC Applet

■ SI Competitor TOC Applet

If, for example, your organization is adding its custom TopNews applet to the Account Briefing, you would modify the SI Account TOC applet by adding the name of the TopNews applet.

Adding a Control to the Table of Contents Applet

To add an applet to a Table of Contents applet

1 Select the Table of Contents (TOC) applet that you want to modify.

2   Add a new control to the TOC applet to represent the applet that you want to display in the TOC.

Other than the name, you can accept the default attributes for controls. Note that this control does not map to a field on the business component. It is simply a placeholder for the TOC entry that points to a specific applet.

The following table describes the attributes of the control.

Property	Example Value	Comments
Name	TopNews	The name of the control must match the name of the applet you want to display on the TOC applet.
Caption	TopNews	The caption is displayed in the TOC.

3   Select the Applet Web Template called *TOC Items.*

4   Add an Applet Web template item to represent the applet that you want to display on the TOC applet.

Property	Example Value	Comments
Name	TopNews	The name of the Web template item must match the name of the applet you want to display on the TOC applet.
Item Identifier	706	TOC applets have three 10-item columns used to display the names of the applets that appear on the page. Web Template Item Identifiers determine the column and sequence of the items on the TOC. 501-510 displays in the left column. 601-610 displays in the middle column. 701-710 displays in the right column.
Type	Control	Specifies whether the template is a Symbolic URL.

Adding an Applet to a Briefings View

If, for example, your organization wants to display TopNews data on the Account Briefing, you must add the TopNews applet to the Account Briefing view.

To map an applet to a view

1   Add the applet you created to the view where you want it to appear.

2   Map the Web template item to the view.

NOTE: Make sure that the order of the applets on the view is consistent with the order of the controls (applet names) on the TOC applet.

Defining Content Agents for Briefings

You define content agents using the Administration - Integration screen views. To define the content agent, you need the data host's URL, the authentication parameters, and required arguments. The components of the HTTP request are shown in Figure 9.
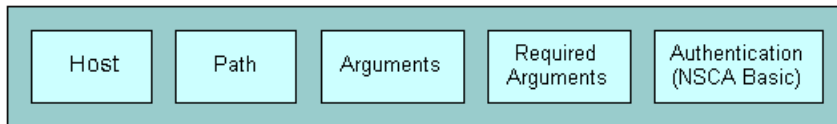

Figure 9.   Content Agent URL Components

For example, your organization might define a content agent that has the required information for building an HTTP request to TopNews.com. The content agent would include the D-U-N-S Number as a search term, the organization's user name and password for the TopNews site, and an argument limiting the number of returned articles. For more information on Content Agents, see Content Agents and Requests to External Content Sources on page 27.

To define a content agent

1 Navigate to the Administration - Integration screen, then the WI Symbolic URL List view.

2 From the visibility filter, choose Host Administration.

3 Define the server address and user credentials (user name and password).

4 From the visibility filter, choose Symbolic URL Administration.

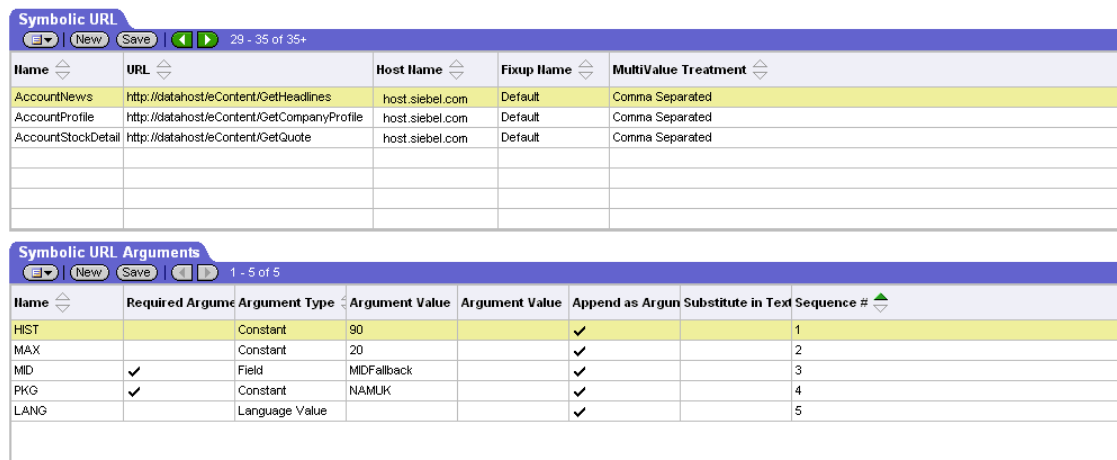**5** In the Symbolic URL list, define the symbolic URL.

The following table describes the fields in the Symbolic URL list.

Field	Comments
Name	The name of the Symbolic URL (the field user property on the business component).
URL	The URL for the external content.
Host Name	The name of the external host. Click the Host Name select button to choose a name from the list.

Field	Comments
Fixup Name	The link target and view that displays the link. The Fixup Name updates a relative link with necessary information such as server name, and so on.
MultiValue Treatment	The formatting method to use when multiple values are passed. Choose from the following options: Comma-separated Separate arguments Use first record only

6   After you have completed the Symbolic URL form, create the content agent definition using the Symbolic URL Arguments list.

The following figure shows an example of the Symbolic URL and Arguments lists.

The following table describes the fields in the Symbolic URL Arguments list.

Field	Instructions
Name	Enter a name for the argument.
Required Argument	Select the check box if this argument is required in the content agent. If the Required Argument option is not selected, the URL is not passed to the content host.
Argument Type	Specify the type of argument. Options are BC (business component) and Field, Constant, Field, Language Value, and URL Argument.

Field	Instructions
Argument Value	Enter the literal value for the argument. Arguments are values from the Siebel database or static text defined as field user properties on the business component. In this example, Max is the maximum number of headlines to be retrieved and MID is the value of the MID field user property (MID is the D-U-N-S Number).
Append as Argument	Select the check box if you want this argument to be appended to the URL. This option provides an easy method for turning on or off an argument.
Substitute in Text	Select the check box if you want the argument value to replace a text string.
Sequence #	Enter a number to indicate the relative order of the argument. You can enter the arguments in the form in any order and then use the sequence number to order or reorder the arguments. If you leave these fields blank, the arguments appear in the same order in which they appear in the form.

Number the entries in such a way that you can add arguments as needed at a later time. For example, use a numbering method such as 100, 200, 300, and so on. |

What Happens at Run Time

When a user opens a Briefing document that contains an external data section, the corresponding business component uses the information defined in the content agent to send an HTTP request to an external content source. The external content host sends the HTML results, and the results are displayed in the external data section.

The following example describes what happens at run time if your organization defined a content agent that has the required information for building an HTTP request to TopNews.com.

1 The SI Account External business component and the TopNews applet are initiated. Rows are created and the applet (data section) renders the list column called TopNews, similar to displaying data from the Siebel database.

2 The specialized field for TopNews is calculated by:

■ Gathering the URL, required arguments, and syntax.

■ Generating the HTTP request to TopNews.com.

For example:

```
http://news.topnews.com/bin/script.asp?DUNS=123456789&MAX=10
```

■ Sending the HTTP request to TopNews.

3 TopNews returns the HTML results containing the current news articles for the Account.

4 The articles about the current account are displayed in the TopNews section of the user's Account Briefing document.

6 Administering Siebel Briefings

This chapter describes the administration tasks for Siebel Briefings. It includes the following topics:

- Process of Administering Siebel Briefings on page 39
- Associating Accounts with Briefings Topics on page 39
- Associating Accounts with Briefings Topics on page 39
- Associating a Briefings Topic with Your Company on page 41
- Publishing Literature, Web Clips and Recommended Links in Briefings on page 41
- Publishing Briefings Bulletins on page 45
- Setting Up Synchronization Preferences on page 46
- Predefined Queries for Briefings on page 47
- Briefings Plug-Ins and Viewers for Users on page 48
- News Topics Selection Support for Briefings Users on page 48
- Tracking Profiles Support for Briefings Users on page 49

Process of Administering Siebel Briefings

This topic describes the tasks typically performed by an administrator to set up Siebel Briefings for end users. Your company may use a different process depending on your requirements.

1 Associating Accounts with Briefings Topics on page 39
2 Associating Accounts with Briefings Topics on page 39
3 Associating a Briefings Topic with Your Company on page 41
4 Publishing Literature, Web Clips and Recommended Links in Briefings on page 41
5 Publishing Briefings Bulletins on page 45
6 Setting Up Synchronization Preferences on page 46

Associating Accounts with Briefings Topics

Siebel Briefings Account Topic Manager allows you to associate the accounts and competitors in your Siebel database with topics. Topics are used by Siebel Content Broker to search external content sources.

Siebel Briefings uses the D&B D-U-N-S Company Identifier as its standard for company topics. You use the Account Topic Manager to associate accounts and competitors to D-U-N-S numbers. D-U-N-S numbers are a standard way for external content providers to index company information. If you search using an indexed term, such as the D-U-N-S Number, rather than a more generic search term, such as company name, then your search results are more likely to be accurate and relevant.

NOTE: D-U-N-S numbers that have been assigned and populated to an account do not always appear. To find out if the D-U-N-S has been assigned, click the drop-down list for the D-U-N-S field. If the D-U-N-S record has already been assigned, it appears in this drop-down list. Click OK and the D-U-N-S record appears in the field.

By associating your accounts and competitors to topics, you also gain access to Siebel Company Vocabulary, which provides access to other common company identifiers, such as its stock ticker symbol. This gives you the ability to configure Content Broker to submit different search terms to different content providers—for example, the D-U-N-S Number to one content provider, the stock ticker symbol to another.

For more information about Content Broker, see "About Content Broker" on page 23.

You can associate multiple accounts from your Siebel database to a single topic. This may be appropriate when external content services consider several accounts in your Siebel database as a single entity. For example, you may have several divisions of Acme Inc. (Acme West, Acme East, and Acme South) listed as unique accounts in your Siebel database, while an external content provider may index news based on the parent company, Acme Inc.

You associate accounts to topics using the Account Topic Manager screen. Access this form by navigating to the Administration - Briefings screen, then the Account Topic Manager view.

Linking Accounts With Topics

For news and company information to appear on the My Briefing page, you must link accounts and competitors in your Siebel database to a topic. You link accounts and competitors to topics using the Account Topic Manager.

This task is a step in Process of Administering Siebel Briefings on page 39.

To create or change a topic association

1 Navigate to the Administration - Briefings screen, then the Account Topic Manager view.

The Accounts list shows accounts and competitors from your Siebel database. Name and Location are read-only. If the company is designated as a Competitor in your Siebel database, there is a check mark in the Competitor column.

2 In the Accounts list query for the account or competitor you want to associate to the topic.

3 In the Company Search form, query for the account or competitor name in the Company Name field.

Matching records from your selected external content provider database appear. For example, you might see multiple listings of a company because each location or subsidiary might have its own D-U-N-S assigned to allow specific searches on that location or subsidiary.

4 In the search results list, choose the company you want to define as your account or competitor, and click Assign D-U-N-S.

The corresponding company name and D-U-N-S Number are entered in the Accounts form.

Associating a Briefings Topic with Your Company

To be able to receive news about your own company in the Our Company section of the My Briefing page, you must associate your company with a topic. Using the Account Topic Manager you associate a record called _Our Company_ with your company's D-U-N-S Number.

This task is a step in Process of Administering Siebel Briefings on page 39.

To associate a topic with your company

1 Navigate to the Administration - Briefings screen, then the Account Topic Manager view.

2 In the Accounts list, select the account or competitor you want to associate with a topic.

3 In the Company Search list, query for the account or competitor name in the Company Name field.

4 In the search results list, choose the company you want to define as your account or competitor, and click Assign D-U-N-S.

The corresponding company name and D-U-N-S number are entered in the Accounts list for the selected record.

NOTE: If there is no company news available, the Our Company section does not appear on the My Briefing page.

D&B Account Rationalization Services

D&B provides a service that automates the association of account topics by matching your organization's account records to D-U-N-S numbers in a batch process. A link to D&B's Web site appears on the Account Topic Manager view.

For more information, contact your Siebel sales representative.

Publishing Literature, Web Clips and Recommended Links in Briefings

You can distribute literature items, such as sales brochures, marketing presentations, and price sheets to a targeted audience of users. When you create a literature record in the Siebel Encyclopedia, you identify the accounts, competitors, industries, and products associated with the contents of the file. Users who have selected those topics in their tracking profile receive a link to the literature file. When a user clicks the link, the program that was used to create the file opens and the file appears.

You can use the My Briefing release and expiration date in the Administration - Document screen,
then the Literature view to control when literature items are posted.

Literature associated with accounts and competitors automatically appears in the literature section
of Account and Competitor Briefing pages. Only when the literature items are deleted from the Siebel
Encyclopedia are they removed from Account or Competitor Briefings.

NOTE: Users must have the appropriate applications installed to view literature items. For example,
to view .pdf files, the user must have Adobe Acrobat Reader.

Recommended links allow you to distribute useful Web pages to users. You can include the linked
page in the Web Clips section in-line or as a hyperlink.

When you publish recommended links, you target a specific audience by associating recommended
links to accounts, competitors, industries, and products. The recommended link is distributed to
users who have subscribed to these topics in their tracking profile. You control the release and
expiration date using the Administration - Document screen, then the Literature view.

This task is a step in . For more information about
literature, see *Siebel Applications Administration Guide*.

To publish a literature item in Briefings

1   Navigate to the Administration - Document screen, then the Literature view.

2 In the Literature list, add a record and complete the fields.

The following table describes some of the fields.

Field	Comments
Name	Enter a name for the literature record. This text appears as the link in the Literature section of Briefing pages.
Literature Type	Specify the type of link you are creating. For example, if you are creating a recommended link or Web clip, select Recommended Link. If you are creating a link to a file, select the appropriate type for the file. For example, for a sales presentation, you might select Sales Tool: Presentation. These values are from the Siebel List of Values.
Update File	A check mark in this field indicates that the copy of the literature should be updated automatically each time the original file is updated.
File Name	Enter the name of the file or a URL. URLs must include the protocol, for example, http://.
Synopsis	Enter a summary of the literature item. Text in the Synopsis field appears on the user's My Briefing page. If nothing is entered in the Synopsis field, the contents of the Description field is displayed instead.
Web Display	If you are linking to a Web page, use this field to determine how to display it. ■ Frame. Displays a link to the URL. When the user clicks the link, the content appears in the current frame (the area under the Briefing tabs). ■ Window. Displays a link to the Web page. When the user clicks the link, the page appears in an expanded window. The user must use the Web browser's Back button to return to Briefings. ■ New Window. Displays a link to the Web page. When the user clicks the link, the page appears in a new browser window, allowing the user to switch between Briefings and the Web page. ■ In-Line. Displays the entire Web page in the selected section of the portal page or pages. Displaying Web pages in-line works best with simple Web pages. Large or complex pages, such as those that use JavaScript, can slow down the system and cause unexpected results. Be sure to test in-line pages before distributing them to users.
Release Date	To post the literature item in users' My Briefing pages, enter a release date.
Expiration Date	To post the literature item in users' My Briefing pages, enter an expiration date.

Field	Comments
Distribution Method	Indicates whether or not the file is automatically distributed to all users. ■ Publish. Sends the record to the user and begins the file transmission. If the user does nothing during a synchronization session, the file downloads automatically. If the user explicitly skips the file, the file is not downloaded during the current synchronization session. During the next synchronization session, the same options are presented. ■ By Request. The user receives the record, but not the actual file. The user must request the file by clicking the Request field.
Local	This column is only visible when the user is logged in to a local database. Indicates whether or not the document is available on the local hard disk. If a document is not available locally, you can request it by selecting the Request field. The file is downloaded in the next synchronization session.
Internal	Indicates whether or not the document is about your company and not intended for public distribution (internal). Select the field if the document is internal. Clear the field if the document is about another company (external) or is intended for public distribution. If the literature is internal, it does not appear as a choice in the Enclosure list applet in the My Correspondence Requests view or in the Literature list in the Product Detail Administration view. To change this behavior, remove the Search Specification, Internal = Y on the appropriate Business Component. For more information on changing Business Components, see *Using Siebel Tools*.
Organization	Select the organization to which you want to distribute the literature item.

NOTE: If you do not see the field name in the Literature form, click the menu button on the Literature form and select Columns Displayed.

3 In the More Info form, select or add accounts, competitors, industries and products associated with the literature item.

If the literature item is associated with an account or competitor, it appears in the literature section of the Account or Competitor Briefing page.

For users who have included the associated topics on their tracking profile, a link to the literature item appears in the Literature section on the My Briefing page.

Publishing Briefings Bulletins

Bulletins are internal company broadcast messages that alert users to company announcements. Bulletins appear in the New Bulletins section of the My Briefing page.

This task is a step in .

To publish bulletins on the My Briefing page

1 Navigate to the Administration - Communications screen, then the Message Broadcasts view.

2 In the Message Broadcasts list add a record and enter information for the broadcast message.

The following table describes some of the fields.

NOTE: You must select the Briefing Bulletin check box for the message to appear in the New Bulletins section of the My Briefing page.

Field	Comments
Severity	Severity of the message. Options are Normal, High, Urgent, or Urgent with Alert.
Abstract	The bulletin's title. Text in the Abstract field appears in bold typeface and can be up to 100 characters in length.
Message	Text of broadcast message. This text appears as the body of the bulletin and can be unlimited in length.
Recipient	Select or add the users.
Division	Select or create the Divisions you want to receive the bulletin.
All	Select the All check box to send the bulletin to all users.
Activation Date/Time	Select the activation date and time for the bulletin. If you do not define these dates, the bulletin is published from the current date until the message is deleted from the Siebel database.
Expiration Date/Time	Publication date for the bulletin, and when the bulletin expires. If these dates are not defined and the bulletin is flagged for publication, the bulletin is published from the current date until it is deleted from your Siebel application.
Broadcast	If the check box is selected, the bulletin is available for broadcast.
Briefing Bulletin	If the Briefing Bulletin check box is selected, broadcast messages are displayed in the New Bulletin section on the Briefings home page.

For more information about Message Broadcasting, see the *Siebel Applications Administration Guide*.

Setting Up Synchronization Preferences

Using the Synchronization Manager, users can view Briefings pages offline. When a user synchronizes, the Synchronization Manager creates Briefings pages using data from the server database and then downloads them to the Temporary Internet Files folder on the user's computer. These pages are available for the user to view while working offline. Before synchronizing, the user can select which Briefings pages to download, whether to include linked pages, and whether to follow links to external Web sites.

The Briefings Synchronization Manager requires the version of Microsoft Internet Explorer listed in *Siebel System Requirements and Supported Platforms* on Oracle Technology Network.

This task is a step in .

To set up synchronization preferences

1   From the My Briefings page, click Synchronize Briefings in the link bar.

2   Select the pages to download.

   My Briefing is automatically selected.

3   Select the Include linked pages check box to allow the user to follow links from the Briefing page.

   Selecting this check box includes links to pages one level down from the Briefing page, such as links to news stories, links to views in the Mobile Web client, and internal recommended links. However, My Briefing does not include links to literature items, and Account and Competitor Briefings do not include links to literature items or corporate affiliates.

4   Select the Follow links to outside Web sites? check box to enable links to outside Web pages and cache their content for offline viewing.

5   Click the Synchronize button.

Based on the selections, the Synchronization Manager downloads the selected Briefings pages and linked pages and caches them for offline viewing.

The Synchronization Manager is available using Microsoft Internet Explorer as the default external browser. It is not available using a stand-alone browser.

Users can also connect to the Siebel server and synchronize Briefings pages when they are logged into a server data source.

When users synchronize Briefings pages, the pages are created from the server database. If the local database is not synchronized with the server database, data on the Briefings page may not be in sync with data in the local database. For example, a new opportunity may appear on the My Briefing page, but may not exist yet in the local database.

My Briefings, Account Briefings, and Competitor Briefings are available for offline viewing only after synchronizing using the Synchronization Manager. Other Briefings pages, such as the All Accounts and the All Competitors pages, are not included in the synchronization process. However they may appear in the user's browser while working offline. This is because as a user views these pages, they are cached in the Temporary Internet Files folder on the user's computer. When the browser runs in offline mode, it can open these pages from this location.

Deleting the contents of the Temporary Internet Files folder removes the synchronized Briefings pages. You must run the Synchronization Manager again to download pages for offline viewing.

Predefined Queries for Briefings

Siebel Briefings includes several predefined queries (PDQs) that determine the search specification and the sort order for sections on Briefing pages that retrieve data from the Siebel database.

■ Sort specification is a conditional expression that determines the sort order of retrieved records.

■ Search specification is a conditional expression that determines the set of records retrieved.

There is one predefined query for each of the main business objects in Siebel Briefings. The names of the PDQs and the corresponding Briefing pages are included in Table 6.

See *Using Siebel Tools* for more information about search and sort specifications.

Table 6.   Siebel Briefings Predefined Queries

PDQ Name	Briefing	Business Object
Account	Account Briefing	ePortal Account
Competitor	Competitor Briefing	ePortal Competitor
My Briefing	My Briefing	SI Employee

The following example PDQ is for My Briefing. Notice there are entries for each Siebel data section on the Account Briefing.

```
'Contact'.Search = "[Row Status]='Y' and [Created]>=(Today()-365)"
'Contact'.Sort = "Last Name, First Name"
'Account'.Search = "[Row Status]='Y' and [Created]>=(Today()-1000)"
'Opportunity'.Search = "[Created]>=(Today()-365) and ([Opportunity Sales
Status]='Open' or [Opportunity Sales Status] IS NULL)"
'Opportunity'.Sort = "Row Status (DESC), Revenue (DESC)"
'SI Service Request'.Search = "([Status]<>'Closed' and [Status]<>'Cancelled') and
[Created]>=(Today()-365)"
'SI Service Request'.Sort = "Status, Severity"
'SI Broadcast Message'.Search = "([Activation Date/Time] is null or [Activation
Date/Time] <= Timestamp()) and ([Expiration Date/Time] is null or [Expiration Date/
Time] >= Timestamp()) and ([All]='Y' or ([Msg Postn Id] = PositionId()) or ([Bcast
Postn Id]=PositionId())) and [Via Interactive]='Y'"
'SI Broadcast Message'.Sort = "Created (DESC), Abstract"
'ePortal Literature 1'.Sort = "Sequence"
'ePortal Literature 2'.Sort = "Sequence"
'ePortal Literature 3'.Sort = "Sequence"
'Expense'.Search = "([Status] = LookupValue('EXP_STATUS','In Progress')) or
([Status] = LookupValue('EXP_STATUS','Accepted')) or ([Status] =
LookupValue('EXP_STATUS','Submitted')) or ([Status] =
LookupValue('EXP_STATUS','Approved')) or ([Status] =
```

```
LookupValue('EXP_STATUS','Rejected')) or ([Status] = LookupValue('EXP_STATUS','Next
Approved'))"
'Expense'.Sort = "Submitted Date (DESCENDING)"
```

You can modify PDQs using the Administration - Application screen, then the Predefined Queries view.

NOTE: Modifying a PDQ in the Predefined Queries view changes the query for all users.

Be sure to make a backup copy of the original predefined query that comes with Siebel Briefings. For more information about creating and modifying PDQs, see *Siebel Applications Administration Guide*. For information about search and sort syntax, see the appendix about operators, expressions, and conditions in *Siebel Developer's Reference*.

Briefings Plug-Ins and Viewers for Users

Plug-ins and viewers make it possible for Siebel Briefings users to access and work with files created using a software application such as Microsoft Word or Adobe Acrobat when the full software application is not installed on the user's computer.

You need to make sure that your users have the plug-ins and viewers necessary to work with all the types of files they need to access and to work in Siebel Briefings and in Siebel Business Applications.

News Topics Selection Support for Briefings Users

Users can specify the news topics that appear in Briefings using the My News Topic view. This view allows the user to customize the following features:

■ Select topics from those defined for them by the administrator. These topics can be specific to the user's role. Users select a news package in the News Package list and then click the Predefined and Administrator Defined tab. They query for a topic, and click Select Topic. The selected topic moves to the My Selected News Topic list.

■ Create their own news topics. The user clicks the User Defined tab, queries for a name or term for which they want regular news, and clicks Select Topic. The topic is moved to the My Selected News Topic applet.

■ Select the order in which the news topics are displayed, using the My Selected News Topic list.

■ Select the number of days a topic appears, and number of topic headlines that appear, using the My News Layout Settings applet.

■ Remove any topic from the My Selected News Topics list.

All selected news topics query the Content database and return any results in the My News section of the My Briefing page.

Tracking Profiles Support for Briefings Users

When users first begin using Siebel Briefings, their tracking profiles do not contain the accounts, competitors, industries, or products that they want to track.

Users must set their preferences using the tracking profile to receive the following items:

■ External and internal news and information about their tracked accounts and competitors.

■ Literature associated with their preferred accounts, products, competitors, or industries.

■ Market information about selected stocks in the My Stocks section.

■ Access to Account or Competitor Briefings from the Tracked Account or Tracked Competitor views.

Users can view the tracking profiles from the Briefings screen by clicking Summary in the link bar. Users can also enter or change their tracking preferences by clicking on the corresponding link in the link bar. For example, they can click my Tracked Accounts in the link bar, and then specify the accounts to track in the My Tracked Accounts list.

7 Troubleshooting Siebel Briefings

This chapter provides possible solutions to problems that may occur when working with Oracle's Siebel Briefings. It includes the following topics:

- News Does Not Appear in the Our Company Section on page 51
- 404 Not Found Error in the Siebel Mobile Web Client on page 51
- Users Cannot Add New Competitors to Track on page 52
- My Briefing Displays Slowly on page 52
- Selected Applets Do Not Appear on Briefing Page on page 52
- Users Cannot Add News Topics on page 52
- Users Receive Too Much News on page 52
- Literature and Bulletins Are Out of Date on page 53
- Synchronize Briefings View Is Blank on page 53

News Does Not Appear in the Our Company Section

If news does not appear in the Our Company In The News section of the My Briefing page, but it does appear in other news sections, it is likely that you did not assign an account topic to the special _Our Company_ record.

For more information about how to do this, see "Associating a Briefings Topic with Your Company" on page 41.

404 Not Found Error in the Siebel Mobile Web Client

If users receive a 404 Not Found error in external data sections of the Siebel Mobile Web client, then the constructed external URL went to a valid host name but specified a URL path that does not exist. This usually indicates that a Symbolic URL is not correctly defined.

For more information about how to resolve this problem, see "Content Agents and Requests to External Content Sources" on page 27 and "Associating Accounts with Briefings Topics" on page 39.

Users Cannot Add New Competitors to Track

Competitors are set up in catalog form to control which employees may see them. If the administrator has not set up a competitor catalog or given catalog access to the employee, the competitor list is not available.

If controlling competitor visibility is unnecessary, the applet visibility can be changed so that all users see all competitors in the database.

My Briefing Displays Slowly

If the My Briefing view is taking a long time to display, users can hide applets they do not regularly view using the Edit Layout feature.

Selected Applets Do Not Appear on Briefing Page

If the user selected an applet to display, such as My Opportunities, and the applet does not appear on the Briefing page, this indicates there was no data. Briefings applets appear only if data is available.

In the Account and Competitor briefings, users can see if data is available by checking the table of contents. Data displayed with a blue hyperlink is available to the user; data without a hyperlink is not. The hyperlink takes you to the section of the briefing page that shows the applet.

If the desired applet is an applet that accesses the Content services database, such as Account/ Competitor news, but the user does not see news, this may be because no news was available that day. It may also occur if the D-U-N-S numbers were not mapped correctly in the Account Topic Manager view.

Users Cannot Add News Topics

If the user cannot select news topics in the My News Topics view, you need to verify that news packages were correctly set up and access was provided to the specific user.

Users Receive Too Much News

If the amount of news and data that is published on a regular basis in Oracle's Siebel Briefings becomes too large, you can change the number of days that news and data are published by changing the argument values in the Integration Administration > Symbolic URL view. This decreases the amount of information by removing older items.

The number of days for which articles are published is controlled by the HIST argument value in content agents. The following table provides an example.

Symbolic URL Name	URL	Argument Name	Required	Sequence Number	Argument Type	Argument Value
CompanyNews	http:// datahost/ eContent/ GetHeadlines	HIST	N	1	Constant	90

The default setting for HIST is 90 days.

You can also change the number of articles that are displayed. The number of articles displayed is controlled by the MAX argument value in content agents. The following table provides an example.

Symbolic URL Name	URL	Argument Name	Required	Sequence Number	Argument Type	Argument Value
CompanyNews	http://datahost/ eContent/ GetHeadlines	MAX	N	1	Constant	20

The default setting for MAX is 20 days.

If users find that they are receiving news and information about too many accounts or competitors, they can reduce their list of tracked accounts and competitors by modifying their tracking profile. Users can also set their preferences for the number of articles displayed and order in which they appear using the My News Topic view.

Literature and Bulletins Are Out of Date

If a literature item or bulletin is no longer useful or it is replaced by a more recent version and the original item has not yet reached its expiration date, you can change the item's expiration date to the current date. This removes the item from My Briefing pages.

Synchronize Briefings View Is Blank

Some versions of Microsoft Internet Explorer might cause you to see a blank Synchronize Briefings page. The cause could be related to your Internet Explorer security settings.

Check your Internet Explorer security settings to make sure that the Local Intranet security level is set on Low. In addition, make sure that your ActiveX controls are set to Enable.

To view Internet Explorer security settings

1   Form the Internet Explorer menu, choose Tools, then Internet Options.

2 Click the Security tab and then choose the Local Intranet Web content zone.

3 Click the Custom Level button to view or change the security settings.

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