Siebel eService Administration Guide Addendum for Industry Applications

Siebel Innovation Pack 2015

May 2015

Copyright © 2005, 2015 Oracle and/or its affiliates. All rights reserved.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are “commercial computer software” pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information,
visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit
http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Contents

Chapter 1: What’s New in This Release

Chapter 2: Siebel eBanking and Siebel eBrokerage

About Siebel eBanking 9

About Siebel eBrokerage 10

Purposes of Siebel eBanking and Siebel eBrokerage 11

Differences Between Siebel eBanking and Siebel eService 12

Features in User Interface for Siebel eBanking and Siebel eBrokerage 12
- Login Page 13
- Home Page 13
- Accounts Page 14
- Transfers Page 16
- Bill Pay Page 17
- Customer Service Page 18
- Relationship Page (Siebel eBrokerage Only) 19
- Trades Page (Siebel eBrokerage Only) 19
- My Profile Page 24

About Account Download in Siebel eBanking and Siebel eBrokerage 25

Administering Siebel eBanking and Siebel eBrokerage 27
- Reviewing Data Display 27
- Configuring Service Requests 28
- Personalizing Siebel eBanking and Siebel eBrokerage 28
- Setting the Display Sequence of Financial Accounts 28
- Activating Workflow for Download Button 29
- Adding Account Download File Types 30

Managing Siebel eBanking and Siebel eBrokerage 31
- Authorizing and Enrolling Accounts for a Customer 31
- Unenrolling a Customer 32
- Determining Whether a Customer Is Enrolled 32
- Reviewing Payees and Payments 33

Using Siebel eBanking and Siebel eBrokerage 33
- Transferring Money Into or Out of Accounts 34

Adding Holdings 34
Editing Holdings 35
Adding Investment Interests 35
Editing Investment Interests 36

Chapter 3: Siebel Insurance eService

About Siebel Insurance eService 37

Features in User Interface for Siebel Insurance eService 38
- Home Page 38
- Literature Page 38
- eEvents Page 39
- Service Requests List 39
- Personal Policies List 39
- Group Benefits List 39
- Claims List 40
- My Profile Hyperlink 40
- Help Hyperlink 40
- Contact Us Hyperlink 40
- Log In/Out Hyperlink 40

Administering Siebel Insurance eService 41
- Creating Responsibilities for Siebel Insurance eService 41
- Setting Up Provider Search for Siebel Insurance eService 42
- Setting Up Classes and Seminars for Siebel Insurance eService 43
- Setting Up Health Club Discounts 43
- Setting Up Alternative Medicine Search 44
- Setting Up Pharmacy Locator 44
- Setting Up Formulary Search 45
- Setting Up a Link To Drug Interactions Information 45
- Displaying Auto Policy Coverage Comparisons 46
- Setting Up Printable Online Documents for Siebel Insurance eService 46
- Administering Partner and Claim Center Locators 46
- Setting Up Service Provider Search 46

Using Siebel Insurance eService 47
- Viewing Personal Policy Information 47
- Viewing Information About Providers 48
- Changing Primary Care Providers (HMO only) 48
- Viewing Group Benefit Information 48

Chapter 4: Siebel eEnrollment for Financial Services

About Siebel eEnrollment for Financial Services 51

Features in User Interface for Siebel eEnrollment for Financial Services 51
    Home Page 52
    Literature Page 52
Administering Siebel eEnrollment for Financial Services 53
    Displaying Product Attributes to eEnrollment Users 53
    Setting Up Provider Search for Siebel eEnrollment for Financial Services 53
Using Siebel eEnrollment for Financial Services 54
    Enrolling for Insurance Coverage 54
    Designating a Beneficiary 56
    Displaying Providers 56

Chapter 5: Siebel eCustomer for Financial Services

About Siebel eCustomer for Financial Services 57
Features in User Interface for Siebel eCustomer for Financial Services 57

Chapter 6: Siebel eService for Automotive

About Siebel eService for Automotive 59
Differences Between Siebel eService and Siebel eService for Automotive 60
Features in User Interface for Siebel eService for Automotive 60
    Dealer Locator 61
    Inventory Search for Vehicles 61
    My Account View 62
    My Vehicles View 63
    Vehicle Registration 64
    Service Requests 64
    Service History 65
Administering Siebel eService for Automotive 66
    Activating Vehicle Registration Workflows 66
    Sharing Preventive Maintenance Documents with Customers 66

Chapter 7: Siebel eService for Communications, Media, and Energy

About Siebel eService for Communications, Media, and Energy 69
Differences Between Siebel eService and Siebel eService for CME 69
    Differences in the Customer Portal for CME 69
    Differences in Personalization for CME 71

Chapter 8: Siebel Public Sector eService

About Siebel Public Sector eService 73

Differences Between Siebel eService and Siebel Public Sector eService 73

Using Siebel Public Sector eService 74

Registering on Siebel Public Sector eService 74

Managing Applications 75
    Applying for Benefits 75
    Resuming the Submission of Applications 77
    Viewing the Status of Submitted Applications 79
    Revising Rejected Applications 80
    Adding Attachments to Applications 81
    Cancelling Applications 81
    Deleting Applications 82

Managing Cases 82
    Viewing Cases 83
    Updating Cases 83
    Requesting Appointments for Cases 84
    Viewing the Status of Appointment Requests 85
    Requesting Appeals for Cases 86
    Viewing the Status of Appeal Requests 87

Managing Incidents 88
    Reporting Incidents 88
    Viewing Reported Incidents 89

Index

1 What's New in This Release

What's New in Siebel eService Administration Guide Addendum for Industry Applications, 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

Siebel eBanking and Siebel eBrokerage

This chapter describes Siebel eBanking and Siebel eBrokerage, and provides information about how to administer, manage, and use Siebel eBanking and Siebel eBrokerage. It includes the following topics:

- About Siebel eBanking on page 9
- About Siebel eBrokerage on page 10
- Purposes of Siebel eBanking and Siebel eBrokerage on page 11
- Differences Between Siebel eBanking and Siebel eService on page 12
- Features in User Interface for Siebel eBanking and Siebel eBrokerage on page 12
- About Account Download in Siebel eBanking and Siebel eBrokerage on page 25
- Administering Siebel eBanking and Siebel eBrokerage on page 27
- Managing Siebel eBanking and Siebel eBrokerage on page 31
- Using Siebel eBanking and Siebel eBrokerage on page 33

About Siebel eBanking

Oracle's Siebel eBanking, a part of Siebel eService, provides a comprehensive online banking solution for financial institutions serving consumer and small business customers. Siebel eBanking is completely integrated with Siebel Financial Services applications, so a customer service representative can use a single dashboard for queuing, viewing, and resolving issues that customers submit through the Web, through email, or by telephone.

Siebel eBanking provides multiple means for customers to perform financial transactions, inquire about their accounts, and resolve customer service issues on their own, and provides multiple channels of communication for customers to request and receive support from customer service representatives.

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

Siebel eBanking provides a personalizable portal that supports the following online banking features:

- **Account inquiry.** Customers can gain access to deposit, loan, and brokerage accounts, including transactions, holdings, and balance histories.
- **Transactions.** Siebel eBanking handles funds transfers, wire transfers, electronic bill payments, and requests for bank drafts. Siebel eBanking can serve as the front end for multiple host applications.

- **Customer service.** Customers can create, track, and resolve service requests, including ordering statement copies, ordering extra checks, and changing addresses.
- **Communication capabilities.** Customers can use a geocode-based branch locator and FAQs.
- **Access control.** Siebel eBanking allows for flexible, workflow-driven management of password and logon policies.
- **Web architecture.** Siebel eBanking allows for customization tools for customers, support for single sign on and authentication, and integration with existing Web sites.

Siebel eBanking provides the following additional features:

- You can configure Web pages, views, and applets to conform to a customer's business model and the look and feel of a customer's Web site.
- A salutation applet greets a registered user after login. You can configure this applet to contain any targeted content, such as promotions, service request update information, or a birthday greeting.
- Contact-based login minimizes the number of accounts required to support all customers receiving Web-based support.
- Customers have contact-based data visibility, so they see only their own data.
- Call center agents have a history of each user readily available that is independent of the channel of communication that the user chooses.

About Siebel eBrokerage

Siebel eBrokerage is a Web-based interface that allows investors to manage their brokerage accounts and to resolve service issues with brokerage firms. Investors include both individual investors and large financial institutions, such as pension funds, investment funds, and money management groups. Siebel eBrokerage is completely integrated with Siebel Financial Services applications, so a call center agent can use a single dashboard for queuing, viewing, and resolving issues that customers submit through the Web, through email, or by telephone.

NOTE: Siebel eBrokerage is a customized version of Siebel eBanking that contains the Relationship page, the Trades page, and a customized home page.

Siebel eBrokerage contains all of the functionality of Siebel eBanking. In addition, customers can perform the following self-service tasks:

- Trade stocks, bonds, mutual funds, and options.
- Set up recurring transfers between their bank and brokerage accounts.
- Transfer money by wire.
- Request a copy of a check drawn on their funds.
- Perform a full text search of a knowledge base of frequently asked questions (FAQs) to help resolve a service issue.

Siebel eBrokerage provides the following channels for customers to get help from call center personnel:

- Customers can create or update a service request. They can attach documents and lengthy descriptions to help communicate the problem. A service agent can update the service request with solutions or documents relating to the problem. You can activate workflow policies to notify a customer by email when an agent updates a service request.
- A customer can communicate with service agents by email.

Siebel eBrokerage provides the following additional features:

- You can configure Web pages, views, and applets to conform to a customer's business model and the look and feel of a customer's Web site.
- A salutation applet greets a registered user after login. You can configure this applet to contain any targeted content, such as promotions, service request update information, or a birthday greeting.
- Contact-based login minimizes the number of accounts required to support all customers receiving Web-based support.
- Customers have contact-based data visibility, so they see only their own data.
- Call center agents have a history of each user readily available that is independent of the channel of communication that the user chooses.
- Business-to-business relationships benefit from the delegated administration feature. Registered users with expanded responsibilities can add new users at their site, reducing the administrative load at the Siebel eBrokerage host company.

Purposes of Siebel eBanking and Siebel eBrokerage

Siebel eBanking and Siebel eBrokerage are designed to serve as front-end applications to core processing applications for banks. Enterprise application integration connects these processing applications to the Siebel Business Applications. Table 2 shows the different purposes of the two applications.

Table 2. Purposes for Siebel eBanking and Siebel eBrokerage

Purposes for Siebel eBanking	Purposes for Core Processing Applications
Serve as a customer relationship management application, keeping track of customer profiles and interactions.	Serve as the application of record for financial account balances and transactions.
Request data from a bank processing application and display the data to the end user, integrating and personalizing the data using the customer relationship database.	Maintain financial data and provide data to Siebel eBanking when requested.
Capture financial transaction requests and forward them to a bank processing application.	Receive, process, and fulfill financial transaction requests.

Differences Between Siebel eBanking and Siebel eService

Core functionality that does not appear in Siebel eBanking includes the following functionality:

- Recommended Products
- My Account
- Order Tracking
- Manage Assets
- Service Entitlement
- Anonymous Use
- Customer Satisfaction Survey

NOTE: Unless noted otherwise, all references to Siebel eBanking also apply to Siebel eBrokerage.

Features in User Interface for Siebel eBanking and Siebel eBrokerage

When users log in to the Siebel eBanking Web site, the home page appears. Registered users see only the tabs appropriate to their assigned responsibilities.

This topic contains descriptions of each Siebel eBanking page. The view names in the following list are the display names that the end user sees, and not the view names in Siebel Tools:

- **Home.** The Salutation applet greets each user with a personalized phrase and targeted information. Users can view limited lists of their financial accounts, pending payments, existing service requests, and frequently asked questions (FAQs). In the Search applet, users can perform full text searches of records to resolve service issues on their own. For more information, see "Home Page" on page 13.
- **Accounts.** Users can view all of their financial accounts at a financial institution on one page. They can also access account transaction and investment holding details. For more information, see "Accounts Page" on page 14.
- **Transfers.** Users can transfer funds between accounts and check completed transfers. For more information, see "Transfers Page" on page 16
- **Bill Pay.** Users can schedule one-time or recurring electronic payments, add and modify payees, and check pending and completed payments. For more information, see "Bill Pay Page" on page 17.
- **Customer Service.** Users can submit service requests, including statement requests, requests for checks drawn on their account, requests for check copies, new check orders, stop payment requests, and other problem reports. Users can check the status of existing service requests, view or download forms, and view frequently asked questions. For more information, see "Customer Service Page" on page 18.

- **Relationship (Siebel eBrokerage only).** Users can view the list of contacts at their bank or brokerage firm that are assigned to serve them (or the company that they are affiliated with), current holdings, securities that they are interested in but do not hold, and activities that are performed for their company. For more information, see “Relationship Page (Siebel eBrokerage Only)” on page 19.
- **Trades (Siebel eBrokerage only).** Users can trade stocks, mutual funds, bonds, and options. Users can also look up stock symbols, view open orders, and transfer assets from other institutions. For more information, see “Trades Page (Siebel eBrokerage Only)” on page 19.
- **My Profile hyperlink.** Users can edit account nicknames, contact information, and passwords. For more information, see “My Profile Page” on page 24.
- **Help hyperlink.** Users can receive help using the Siebel eBanking application.
- **Contact Us hyperlink.** Users can send messages to service agents.
- **Log Out hyperlink.** Users click this hyperlink to exit the Siebel eBanking application.

Login Page

The Login page [FINS eBanking Home Page View (Anonymous) or FINS eBrokerage Home Page View (Anonymous)] appears to all users when they navigate to the Siebel eBanking or Siebel eBrokerage Web site. The StartCommand reference in the SWEApp\bin\eapps_sia.cfg file of the Siebel Server indicates the status of this page as a login view. Include the login view in the responsibilities of both anonymous and registered users.

Home Page

After a customer logs in, the home page of Siebel eBanking or Siebel eBrokerage appears with a different set of applets. Customers can review their entire relationship with their financial institution from this single page.

Table 3 shows a mapping between the views and applets in the customer application to the related views in Siebel Finance (the employee application). The view names listed are the display names that the end user sees; they are not the view names in Siebel Tools.

Table 3. Mapping of Siebel eBanking to Siebel Finance for Home Page

Siebel eBanking View	Siebel eBanking Applets	Related Siebel Finance Screens
Home	Salutation	Administration - Personalization, Applets, and then the Salutation Applet (Siebel eBanking)
Home	Special Offers, Announcements	■ Administration - Campaign Management screen, Design, and then the Offers view ■ Administration - Application, then the System Preferences view
Home	Financial Accounts	Financial Accounts screen
Home	Pending Payments	Contacts screen, Bill Payment, and then the Payments Scheduled view
Home	Service Requests	Contacts screen, then the Service Requests view

Accounts Page

In Siebel eBanking, the term accounts refers to financial accounts. Accounts can include asset accounts and liability accounts. Asset accounts include demand deposits (checking), savings, money markets, certificates of deposit, and investments. Liability accounts include credit cards and loans.

A financial account is a customer’s instance of a financial product. For example, a customer's personal savings account has a unique identifying number and is an instance of a savings account product that a financial institution offers. For information about adding or modifying financial accounts, see *Siebel Finance Guide*.

Users can drill down on the Account Number field to view additional information about the transaction history for the account. Users can also download account transactions into a spreadsheet application.

Table 4 shows a mapping between the views and applets in the customer application to the related views in Siebel Finance (the employee application). The view names listed are the display names that the end user sees; they are not the view names in Siebel Tools.

Table 4. Mapping of Siebel eBanking to Siebel Finance for Accounts Page

Siebel eBanking View	Siebel eBanking Applets	Related Siebel Finance Screens
Accounts	Summary, Asset, Liabilities	Financial Accounts screen

Table 4. Mapping of Siebel eBanking to Siebel Finance for Accounts Page

Siebel eBanking View	Siebel eBanking Applets	Related Siebel Finance Screens
Accounts	Account Detail Applets	Financial Accounts screen
Accounts	Transaction History Applets	Financial Accounts screen, then the Transaction Detail view or the Investment Transactions view

In addition to the tasks described in *Siebel Finance Guide*, additional tasks are required for financial accounts to appear in Siebel eBanking. Confirm the following attributes of the financial account and underlying product:

- The Status field for the financial account is set to Open.
- Each financial account has an Account Type field. This field is inherited from the Type field on the product that is associated with the account. You can view the Type field in the Administration - Product screen, then the More Info view. The product type must correspond to the filters used in the user interface.
- Each financial account is associated with at least one contact, and a primary contact is set.
- In Siebel eBanking, the Alias field in the FINCORP Account business component stores the account nickname. A nickname is a name that the end user defines in the My Profile page of Siebel eBanking.

Current Balance Summary Applet in Summary View (FINS eBanking Contact Account Balance Form Applet)

The total asset and liability balance fields are calculated in the following manner:

- The underlying business component queries for all financial accounts for which the user is a contact on the financial account. (The user does not have to be the primary contact on the financial account.)
- The business component sums up the asset and liabilities as follows:
  - **Asset.** All accounts for which the associated product category is Asset.
  - **Liabilities.** All accounts for which the associated product category is Liability.

NOTE: The calculation is a simple arithmetic addition of all Current Balance fields and assumes that the currency type on all accounts is the same.

Deposits and Investments Applet in Summary View

This applet contains all financial accounts for which the associated product category is Asset.

NOTE: The Account Type field controls the navigation to the Account Detail view. There is one Account Detail view for each account type. If you introduce new account types, then you must also confirm that an appropriate Account Detail view corresponds to these new account types.

Credit and Loans Applet in Summary View

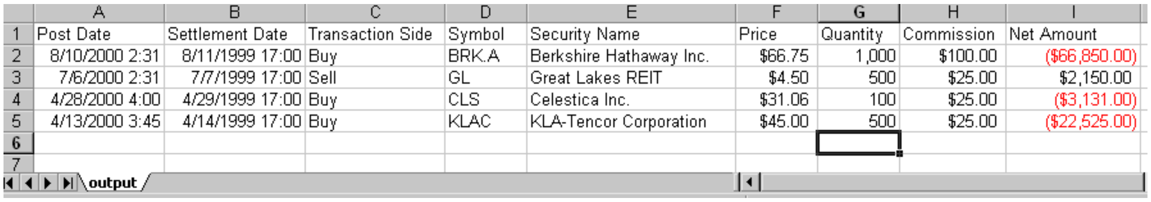
This applet contains all financial accounts for which the associated product category is Liability.

Select Account Applet in Account Detail Views

This applet provides quick access to all financial accounts that for the user. This applet does not function properly if the user is not the primary contact on all financial accounts that appear in Siebel eBanking.

Download in Account Detail Views

Customers can download account transaction information for any of their accounts to a comma-separated values (CSV) file. They can then open and view this file using common spreadsheet applications. Figure 1 shows an example of this file type opened in a spreadsheet application.



	A	B	C	D	E	F	G	H	I
1	Post Date	Settlement Date	Transaction Side	Symbol	Security Name	Price	Quantity	Commission	Net Amount
2	8/10/2000 2:31	8/11/1999 17:00	Buy	BRK.A	Berkshire Hathaway Inc.	$66.75	1,000	$100.00	($66,850.00)
3	7/6/2000 2:31	7/7/1999 17:00	Sell	GL	Great Lakes REIT	$4.50	500	$25.00	$2,150.00
4	4/28/2000 4:00	4/29/1999 17:00	Buy	CLS	Celestica Inc.	$31.06	100	$25.00	($3,131.00)
5	4/13/2000 3:45	4/14/1999 17:00	Buy	KLAC	KLA-Tencor Corporation	$45.00	500	$25.00	($22,525.00)
6									
7									

Figure 1. Example CSV File Opened in a Spreadsheet Application

Transfers Page

Siebel eBanking provides the ability to transfer funds between accounts. You can transfer funds between two accounts in the same institution, between institutions, or between institutions through a wire service. You can set up all transfers except wire transfers to recur at a specified interval.

In the Transfers page, users can view a history of their transaction, transfer funds in or out, or transfer funds to another financial institution.

Table 5 shows a mapping between the views and applets in the customer application to the related views in Siebel Finance (the employee application). The view names listed are the display names that the end user sees; they are not the view names in Siebel Tools.

Table 5. Mapping of Siebel eBanking to Siebel Finance for Transfers Page

Siebel eBanking View	Siebel eBanking Applets	Related Siebel Finance Screens
Funds Transfer	Transfer Funds	Service screen, Account Services, and then the Funds Transfer view
Transfer Money In, Transfer Money Out	Transfer Money In, Transfer Money Out	Service screen, Account Services, and then the Auto Payment / Saver view
Wire Transfer	Wire Transfer	Service screen, Account Services, and then the Wire Transfer view

About Transferring Funds

By default, error checking is performed on any request that you create using the FINS eBanking Service Request Funds Transfer Form applet. The following checks are performed:

- To Account and From Account field are not null.
- To Account and From Account are not the same value.
- Amount is not null, or less than or equal to 0.
- Amount does not exceed the Current Balance value of the From Account.

You might want to disable this error checking or to replace this checking with a configuration specific to your requirements. To do so, you can modify the FINS eBanking Service Request Funds Transfer Form Applet by setting the ErrorCheck Value applet property to False.

Bill Pay Page

Electronic bill payment allows customers to pay bills from their home computers. Customers can select the accounts that they want to pay, and make single payments or automatic recurring payments at any time.

Before customers can use bill payment, they must contact your company so that you can enroll them in this service, which typically requires a fee.

Siebel eBanking supplies the basic user interface for electronic bill payment, but you must complete the configuration and set up integration with a billing service provider (BSP) before your customers can use this feature.

The customer or a call center agent at your company initiates the following actions relating to electronic bill payment:

- Enroll
- Unenroll
- Add payee
- Delete payee
- Add payment
- Cancel payment

A call center agent performs the enroll and unenroll actions in Siebel Finance. The customer performs the other actions through the Siebel eBanking Web site.

Call center agents perform the following tasks relating to bill payment:

- Authorizing an account
- Enrolling a customer
- Unenrolling a customer
- Determining whether a customer is enrolled
- Reviewing the payee setup

Customer Service Page

A service request is a customer's request for assistance with products or services that the customer purchases. All service requests include a service request number, a title, a description, and a status.

Examples of service requests include the following items:

- Requests for financial account statements
- Requests for check copies
- Check orders
- Requests for bank checks
- Requests to stop payments
- Other reports of problems

Registered users submit new service requests and check the status of existing service requests through the views in the Customer Service page.

You can manually assign service requests to service agents, or an administrator can create assignment rules to automatically assign service requests to agents using criteria, such as product expertise.

Table 6 shows a mapping between the views and applets in the customer application to the related views in Siebel Finance (the employee application). The view names listed are the display names that the end user sees; they are not the view names in Siebel Tools.

Table 6. Mapping of Siebel eBanking to Siebel Finance for Customer Service Page

Siebel eBanking View	Siebel eBanking Applets	Related Siebel Finance Screens
Summary	Service Requests	■ Contacts screen, then the Service Requests view ■ Service screen
Request a Statement	Request a Statement	Service screen, Account Services, and then the Statement Copy view
Request a Check Copy	Order a Check Copy	Service screen, Account Services, and then the Check Copy Request view
Request a Stop Payment	Request a Stop Payment	Service screen, Account Services, and then the Stop Payment view
Order Checks	Order Checks	Service screen, Account Services, and then the Check Order view
Request a Bank Check	Request Bank Check	Service screen, Account Services, and then the Bank Check view
Report a Problem	Report a Problem	Service screen

Table 6. Mapping of Siebel eBanking to Siebel Finance for Customer Service Page

Siebel eBanking View	Siebel eBanking Applets	Related Siebel Finance Screens
Forms	Literature	Administration - Document screen, then the Literature view For more information, see "Literature Page" on page 38
Frequently Asked Questions	Frequently Asked Questions	Administration - Solution screen, then the Solutions view Check Publish External

Relationship Page (Siebel eBrokerage Only)

The Relationship page displays a list of user coverages, holdings, interests, and activities. In the Relationship page, users can view their trade history.

Table 7 shows a mapping between the views and applets in the customer application to the related views in Siebel Finance (the employee application). The view names listed are the display names that the end user sees; they are not the view names in Siebel Tools.

Table 7. Mapping of Siebel eBrokerage to Siebel Finance for Relationship Page

Siebel eBrokerage View	Siebel eBrokerage Applets	Related Siebel Finance Screens
Relationship	Coverage	Contacts screen, then the Coverage Team view
Relationship	Holdings	Holdings and Interests screen, then the Holdings view
Relationship	Interests	Holdings and Interests screen, then the Interests view
Relationship	Activities	Contacts screen, then the Activities view

Trades Page (Siebel eBrokerage Only)

In the Trades page, users can buy and sell stocks, mutual funds, bonds, and options. Also, you can transfer assets from other institutions to their accounts. You can view and cancel open orders for stock, bond, mutual fund, and option trades.

In the Trades page, users can view their trade history.

In Siebel Finance, all trades map to the Service Requests screen. There is no direct link to the trade or investment views. An administrator can configure the workflow processes to check for service requests, and then execute a trade from a back-end application.

Trade Cancellation

You can cancel trade orders by drilling down on a trade number from either the Siebel eBrokerage home page or the Trades Summary page. To change default behavior for trade cancellation, use Siebel Tools to modify the FINS eBrokerage Trade Detail Form Applet. Table 8 shows the applet user properties that govern trade cancellation behavior.

Table 8. Applet User Properties for Trade Cancellation

Property Name	Default Value	Description
Cancel Trade Confirm Page Sequence	1	This property sets the sequence of the page to appear for confirming the trade cancellation. This number must match the sequence number for the page created in Applet Web Templates.
Disable DeleteRecord	Y	If this property is set to Y, then trade cancellation is enabled for all trades with a status of Pending. If this property is set to N, then trades cannot be canceled.
Disable DeleteRecord GotoView	FINS eBrokerage Open Orders List View	This property designates the view to appear immediately after the cancellation is confirmed.

Trade Error Checking

When a user enters a trade order, Siebel eBrokerage validates the order information. Each type of trade has validation rules that you can configure in Siebel Tools by setting user properties for the following applets:

- FINS eBrokerage Stock Trade Form Applet. For more information, see Table 9 on page 21.
- FINS eBrokerage Option Trade Form Applet. For more information, see Table 10 on page 22.
- FINS eBrokerage Mutual Fund Sale Form Applet. For more information, see Table 11 on page 22.
- FINS eBrokerage Mutual Fund Purchase Form Applet. For more information, see Table 12 on page 23.
- FINS eBrokerage Bond Trade Form Applet. For more information, see Table 13 on page 23.
- FINS eBrokerage Transfer Securities In Applet. For more information, see Table 14 on page 24.

The tables in this topic describe the user properties for each of these applets, associated settings, and the type of error checking that is handled by default when a user submits a trade. If the error checking described in these tables is insufficient, then the administrator can use VB (Visual Basic) Script or Siebel eScript to further customize error checking for trade orders.

Table 9 describes user properties for the FINS eBrokerage Stock Trade Form Applet.

Table 9. FINS eBrokerage Stock Trade Form Applet

Property Name	Default Value	Description
Error Type 1 Sequence Number	3	This property sets the sequence of the page to appear if a limit order is entered and limit price or stop price is not entered. This number must match the sequence number for the page created in Applet Web Templates.
Error Type 2 Sequence Number	4	This property sets the sequence of the page to appear if an order is entered and all of the required entry fields are left blank. This number must match the sequence number for the page created in Applet Web Templates.
Error Type 3 Sequence Number	5	This property sets the sequence of the page to appear if a market order is entered and the stop price is also entered. This number must match the sequence number for the page created in Applet Web Templates.
Error Type 4 Sequence Number	6	This property sets the sequence of the page to appear if a market order is entered and the limit price is also entered. This number must match the sequence number for the page created in Applet Web Templates.
Error Type 5 Sequence Number	7	This property sets the sequence of the page to appear if a market order is entered and the limit price and stop price is also entered. This number must match the sequence number for the page created in Applet Web Templates.
FINS eBrokerage Type	Stocks Trade	Do not change this property value.

Table 10 describes user properties for the FINS eBrokerage Option Trade Form Applet.

Table 10. FINS eBrokerage Option Trade Form Applet

Property Name	Default Value	Description
Error Type 1 Sequence Number	3	This property sets the sequence of the page to appear if an order is entered and any of the required fields are left blank. This number must match the sequence number for the page created in Applet Web Templates.
Error Type 2 Sequence Number	4	This property sets the sequence of the page to appear if a limit order is entered and the limit price is not entered. This number must match the sequence number for the page created in Applet Web Templates.
Error Type 3 Sequence Number	5	This property sets the sequence of the page to appear if a market order is entered and the limit price is also entered. This number must match the sequence number for the page created in Applet Web Templates.
FINS eBrokerage Type	Options Trade	Do not change this property value.

Table 11 describes user properties for the FINS eBrokerage Mutual Fund Sale Form Applet.

Table 11. FINS eBrokerage Mutual Fund Sale Form Applet

Property Name	Default Value	Description
Error Type 1 Sequence Number	3	This property sets the sequence of the page to appear if an order is entered and any of the required fields are left blank. This number must match the sequence number for the page created in Applet Web Templates.
FINS eBrokerage Type	Mutual Fund Sale	Do not change this property value.

Table 12 describes user properties for the FINS eBrokerage Mutual Fund Purchase Form Applet.

Table 12. FINS eBrokerage Mutual Fund Purchase Form Applet

Property Name	Default Value	Description
Error Type 1 Sequence Number	3	This property sets the sequence of the page to appear if an order is entered and any of the required fields are left blank. This number must match the sequence number for the page created in Applet Web Templates.
FINS eBrokerage Type	Mutual Fund Purchase	Do not change this property value.

Table 13 describes user properties for the FINS eBrokerage Bond Trade Form Applet.

Table 13. FINS eBrokerage Bond Trade Form Applet

Property Name	Default Value	Description
Error Type 1 Sequence Number	3	This property sets the sequence of the page to appear if an order is entered and any of the required fields are left blank. This number must match the sequence number for the page created in Applet Web Templates.
Error Type 2 Sequence Number	4	This property sets the sequence of the page to appear if a limit order is entered and the limit price is not entered. This number must match the sequence number for the page created in Applet Web Templates.
Error Type 3 Sequence Number	5	This property sets the sequence of the page to appear if a market order is entered and the limit price is also entered. This number must match the sequence number for the page created in Applet Web Templates.
FINS eBrokerage Type	Bonds Trade	Do not change this property value.

Table 14 describes user properties for the FINS eBrokerage Transfer Securities In Applet.

Table 14. FINS eBrokerage Transfer Securities In Applet

Property Name	Default Value	Description
Error Type 1 Sequence Number	3	This property sets the sequence of the page to appear if both the entire and partial account transfer is chosen. This number must match the sequence number for the page created in Applet Web Templates.
Error Type 2 Sequence Number	4	This property sets the sequence of the page to appear if neither entire or partial account transfer is chosen. This number must match the sequence number for the page created in Applet Web Templates.
FINS eBrokerage Type	Bonds Trade	Do not change this property value.

My Profile Page

Customers maintain personal profile information by clicking My Profile from any page. They can add or modify contact preferences, contact addresses, financial account nicknames, and login passwords. Default contact preferences include phone numbers, email address, best time to call, and preferred language. For information about administering login usernames and passwords, see the information about user access in this guide. For information about automating data import tasks, see *Siebel Enterprise Integration Manager Administration Guide.*

Table 15 shows a mapping between the views and applets in the customer application to the related views in Siebel Finance (the employee application). The view names listed are the display names that the end user sees; they are not the view names in Siebel Tools.

Table 15. Mapping of Siebel eBanking to Siebel Finance for My Profile Page

Siebel eBanking View	Siebel eBanking Applets	Related Siebel Finance Screens
User Profile	User Profile	Contacts screen
Address Book	Addresses	Contacts screen
Subscriber Preferences	Subscriber Preferences	Contact screen (all fields are not visible in Siebel Finance)
Account Nicknames	Account Nicknames	No corresponding view exists in Siebel Finance for this data.

On the My Profile page, note the following functionality:

- Contact preference changes are written directly to the customer’s contact record.
- Added or modified addresses are logged as service requests with a Type field of Bank and an Area field of Customer Address.
- Account nicknames appear in account list applets. A nickname for a financial account is the Alias field value in the FINCORP Account business component instance for the financial account.

NOTE: You can provide account nicknames for customers by initializing the Alias field with the Product name when an account is created. A new account then always displays a name in the Account Nickname field. You can automate this task using Siebel Business Process Designer or Siebel Enterprise Integration Manager.

About Account Download in Siebel eBanking and Siebel eBrokerage

The preconfigured Siebel eBanking and Siebel eBrokerage applications allow your customers to download account information to a comma-separated values (CSV) file that they can open in a spreadsheet application. If you want your customers to be able to download account data to other file types, then you must configure Siebel eBanking.

This topic explains how account download works in the preconfigured Siebel eBanking and Siebel eBrokerage application. Understanding account download, helps you to design your configuration.

Overview of Downloading an Account

The method that the customer follows to initiate an account download is slightly different for brokerage accounts and other accounts.

- **Brokerage Accounts.** The customer selects a brokerage account in Siebel eBrokerage and clicks the Download button on the Investment Transactions applet. A File Download dialog box opens asking whether the customer wants to open or save the file. The customer selects Save this file to disk, clicks OK, and completes the information in the Save As dialog box to download a comma-separated values (CSV) file containing investment transaction records.
- **Other Accounts.** The customer selects a non-brokerage account in Siebel eBanking or Siebel eBrokerage and clicks the Download button on the Recent Transactions applet. In the Account Download applet, the customer enters the starting and ending dates for the transaction data and selects the CSV file format. The query uses the selected dates for the search specification. If the customer performed an account download on this account before, then the start date defaults to the end date of the last download. If no dates are selected, then all of the transaction data is downloaded for the account period between the last time data is downloaded and the present. If no file format is selected, then the data output appears as a Siebel message, which is XML-formatted and describes Siebel data. When the customer clicks the Download button, the search specification is sent to the FINS eBanking Account Download Outbound workflow, which then begins.

During the workflow process, a query is used to export the requested data to an instance of a source integration object that uses Siebel format. The Data Transformation Engine converts the data to a format that is consistent with the CSV format and stores it in an instance of a target integration object. The workflow passes the data back to the Account Download applet as a text string. The applet then prompts the Web browser of the user to save the text string as a file on the user's computer.

Workflow Details

Figure 2 shows the FINS eBanking Account Download Outbound workflow.

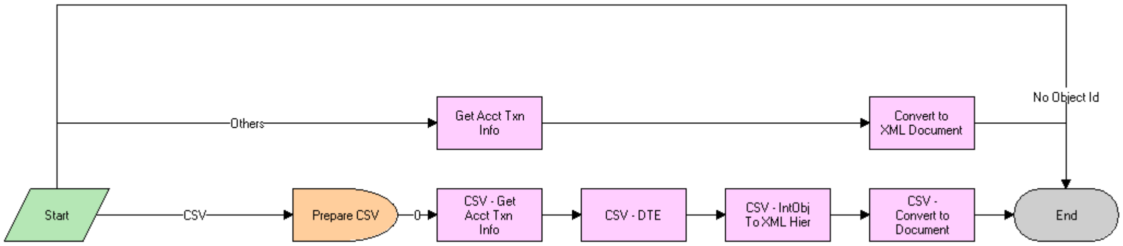


Figure 2. FINS eBanking Account Download Outbound Workflow

If the selected file format is CSV, then the lower path of the workflow is followed. If the selected file format is not CSV, then the upper path of the workflow is followed. If the Download button is clicked with no active record (no row Id for the primary business component for the business object), then the workflow ends.

The preconfigured Siebel eBanking application does not use the upper path in the workflow, which includes the Get Acct Txn Info and Convert to XML Document steps. However, you can configure the Siebel eBanking application so that the workflow is triggered in a way that does not eliminate the possibility that no active record is selected. In this case, the upper path is used to bypass steps that might cause unwanted behavior.

Workflow Description. This workflow performs the following actions:

1. **Prepare CSV.** This step specifies FINSAcctDlCSVMapOut as the data map that the Data Transformation Engine uses to map Siebel data to the target data format. This step also specifies FINS eBanking Account Download CSV Interface as the target integration object that stores the data after data transformation.
2. **CSV - Get Acct Txn Info.** This step uses the EAI Siebel Adapter to find the transaction data between the starting and ending dates that the customer specifies. The data is stored in memory as an instance of the FINS eBanking Account Download Internal source integration object in Siebel format.
3. **CSV - DTE.** This step invokes the Execute method of the EAI Data Mapping Engine business service to move the data in the FINS eBanking Account Download Internal integration object to the FINS eBanking Account Download CSV integration object, according to the mapping in the FINSAcctDlCSVMapOut data map.

4 **CSV - IntObj To XML Hier.** This step uses the EAI Integration Object to XML Hierarchy Converter to convert the Siebel format to XML by flattening the data hierarchy and removing unneeded metadata tags.

5 **CSV - Convert to Document.** This step uses the FINS EAI Free Format Hier Converter to convert the XML data to the text string that is returned to the Account Download applet.

Input arguments in this step are selected to define the format of the output. Optionally, the administrator can add an input parameter to set the XMLFormatting user property of the FINS EAI Free Format Hier Converter business service. By default, this property is False, which means that text is retained in its original format. When set to True, XML conventions for text handling are used; for example, apostrophes are encoded as &apos; and < is replaced with &lt;.

Administering Siebel eBanking and Siebel eBrokerage

This topic lists the tasks that are specific to Siebel eBanking and Siebel eBrokerage. For information about administrative tasks that are consistent in Siebel Financial Services, see *Siebel eService Administration Guide*.

To administer Siebel eBanking and Siebel eBrokerage, administrators perform the following tasks:

- "Reviewing Data Display" on page 27
- "Configuring Service Requests" on page 28
- "Personalizing Siebel eBanking and Siebel eBrokerage" on page 28
- "Setting the Display Sequence of Financial Accounts" on page 28
- "Activating Workflow for Download Button" on page 29
- "Adding Account Download File Types" on page 30

Reviewing Data Display

The configurator or system administrator must review the following information carefully to make sure the user interface is consistent with your organization's standards:

- Make sure that you search and sort specifications for all applets. Make sure that any new data elements defined by your organization properly appear in existing applets.
- Make sure that integration for the bank processing application is in place for all data elements that appear to users.
- Make sure that date and time formats are consistent with the representation of such data in the core bank processing applications.
- If necessary, configure logic to make sure the data display is consistent. For example, the creation of a funds transfer request in Siebel eBanking and Siebel eBrokerage does not automatically modify financial account balances. Those values change only after new balances are reloaded into Siebel eBanking from the bank processing application.

- Make sure any user interface modifications are compatible with the Internet browsers supported by your organization.

Configuring Service Requests

Siebel eBanking and Siebel eBrokerage allow users to create service requests, such as funds transfers. Preconfigured, Siebel eBanking and Siebel eBrokerage do not provide prebuilt business logic governing the creation of requests, such as limits on data entry or other error checking. The configurator or system administrator performs the following tasks to configure service requests:

- Establish appropriate user responsibilities and visibility to provide only necessary views, applets, or controls.
- Review all applets to make sure that they display values relevant for your organization.
- Determine and set required fields at both the object and user interface levels.
- Implement field validation logic. To configure field validation, use the Validation business service or set object properties in Siebel Tools. For more complex logic, use server scripting. Siebel eBanking and Siebel eBrokerage are standard interactivity applications.
- Test the configured Siebel eBanking or Siebel eBrokerage application, including integration and boundary conditions to verify business logic and error messages. The system administrator must understand the location of each data element stored during the creation of a service request, at both the object and Siebel database levels.
- If applicable, confirm that employee users have access to the service request data captured in Siebel eBanking and Siebel eBrokerage.
- If applicable, confirm that service requests created in Siebel eBanking appear to the user in the various Service Request list applets.

Personalizing Siebel eBanking and Siebel eBrokerage

Using Siebel Personalization, you can create personalization rules and apply them to applets and views so that each individual can view personalized content through these applets and views. For example, you can create personalized text messages to alert users to update their user profiles or to remind them to review their open service requests. After users update their user profiles and review the service requests, the personalized messages disappear automatically. Personalization rules can evaluate each user's navigational clicks, render the appropriate text messages, and guide users through the site. For more information about setting up and implementing Siebel Personalization, see *Siebel Personalization Administration Guide*.

Setting the Display Sequence of Financial Accounts

By default, customers see their financial accounts in administrator-defined display sequences.

The administrator assigns a display sequence to each financial product in a category of financial products. The categories of financial products are Assets and Liabilities. For example, in the Assets category, the administrator can assign display sequence 1 to the Savings or MMA product so that accounts of that product type appear first.

In the Summary view of the Accounts page, the financial accounts in the Deposits and Investments applet appear in the sequence that you set for the associated product types in the Assets category. The accounts in the Credit and Loans applet appear in the sequence that you set for the Liabilities category.

The home page Accounts list applet displays financial accounts in both the Assets and Liabilities categories. Accounts appear according to the associated sequence number, independent of category.

NOTE: Assign separate sequence intervals to categories to group financial accounts by category in list applets that include more than one category. For example, you can assign sequence numbers 0 through 99 to products in the Assets category and numbers 100 through 199 to products in the Liabilities category. Then, asset accounts appear before liability accounts.

If sorting is available for an applet that lists financial accounts, then customers can sort financial accounts alphabetically in ascending or descending order. To restore the default sequence, the customer must refresh the page or log out and log in again.

To set the default sequence of financial accounts

1. In Siebel Finance, navigate to the Administration - Product screen.
2. Click Query.

   An empty record appears.

3. In the Financial Product Type field, select the type of financial products to sequence.

   If necessary, you can display the Financial Product Type field by clicking the menu button and selecting Columns Displayed.

4. Click Go.

   The products that meet the query criteria appear.

5. Enter a number in the Display Sequence field for each product.

   If necessary, you can display the Display Sequence field by clicking the menu button and selecting Columns Displayed.

Activating Workflow for Download Button

Customers can use the Download button after you activate the FINS eBanking Account Download Outbound workflow. If you want to configure Siebel eBanking so that your customers can download account information to other file types, then see “Adding Account Download File Types” on page 30.

To activate the workflow for the Download button

1. In Siebel Finance, navigate to the Administration - Business Process screen.

2. Select the FINS eBanking Account Download Outbound workflow in the Workflow Processes list.
3. Click Revise to make a new version of the workflow.
4. Click Activate.

Adding Account Download File Types

If you want your customers to be able to download account data to file types other than comma-separated values (CSV) files, then you must configure Siebel eBanking.

The general process for this configuration follows:

1. Add a new value to the File Format drop-down list. For more information, see "Adding a New Value to the File Format Drop-Down List" on page 30.
2. Create an integration object to store data in the format of the new file type. For more information, see "Creating an Integration Object for the New File Type" on page 31.
3. Create the data map between the Siebel format integration object and the target integration object that you create in Step 2. For more information, see "Creating the Data Map" on page 31.
4. Add a new branch to the FINS eBanking Account Download Outbound workflow. For more information, see "Modifying the Workflow" on page 31.

Adding a New Value to the File Format Drop-Down List

You must add a new value to the File Format drop-down list that appears in the Siebel eBanking Account Download applet. For more information about lists of values, see *Siebel Applications Administration Guide*.

To add a new value to the File Format drop-down list

1. In Siebel Finance, navigate to the Administration - Data screen, then the List of Values view.
2. In the List of Values list, query for a value of ACCTDL_FILE_TYPE in the Type field.
3. Complete the fields in the following table.

Field	Description
Display Value	Type the name of the file type that you want to appear in the File Format drop-down list.
Language-Independent Code	Type the value to use for conditional branching. This value can be the same as the Display Value field.
Language Name	Select English-American
Active	Select the check box.
Translate	Clear the check box if it is selected.
Replication Level	Select All

Creating an Integration Object for the New File Type

In Siebel Tools, you must create an integration object that describes the format of the new file type (the target format). If you have the DTD (Document Type Definition) file of the target data format, then you can use the DTD Wizard in Siebel Tools to build this integration object. For more information about creating integration objects, see *Using Siebel Tools*.

Creating the Data Map

You must create a data map record and then use the Siebel Data Map Editor to create the map that the Data Transformation Engine uses to change the format and hierarchy of the Siebel format source integration object instance to that of the target integration object instance. You create data map records in the Data Map view of the Administration - Integration screen. You perform the data mapping in the Data Map Editor view of the Administration - Integration screen. For detailed information about how to create data maps, see *Transports and Interfaces: Siebel Enterprise Application Integration*.

Modifying the Workflow

You must create a new path from the Start step of the FINS eBanking Account Download Outbound workflow for each new file format that you want to support. The relevant steps must reference the target integration object and data map that you create.

Managing Siebel eBanking and Siebel eBrokerage

This topic lists the tasks that call center agents can perform to manage Siebel eBanking and Siebel eBrokerage.

To manage Siebel eBanking or Siebel eBrokerage, call center agents perform the following tasks:

- "Authorizing and Enrolling Accounts for a Customer" on page 31
- "Unenrolling a Customer" on page 32
- "Determining Whether a Customer Is Enrolled" on page 32
- "Reviewing Payees and Payments" on page 33

Authorizing and Enrolling Accounts for a Customer

When a customer calls and asks to be enrolled in the online banking application of your company, the call center agent can select (authorize) the accounts to use for online banking before enrolling the customer.

To authorize and enroll accounts for a customer

1. In Siebel Finance, navigate to the Service Requests screen, then the Service Requests List view.

2 In the visibility filter, select All Service Requests.

3 Add a new record in the Service Requests List, and complete the necessary fields.

Some fields are shown in the following table.

Field	Value
Type	Bank
Area	Bill Pay SignUp
Last Name	Customer's last name

4 Click the hyperlink in the SR number (#) field.

5 In the Bill Pay Sign Up view of the Account Services view, click the select button in the Authorized Account field.

The Financial Accounts dialog box appears. If no records appear in this dialog box, then make sure that the service request is associated with a contact and that the contact is associated with one or more financial accounts.

6 Click the Bill Pay Enable field to place a check in each account for which Bill Pay is authorized to draw funds.

7 Click OK to close the dialog box.

Unenrolling a Customer

Call center agents can unenroll customers.

To unenroll a customer

1 In Siebel Finance, navigate to the Service Requests screen, then the Service Requests List view.

2 In the visibility filter, select All Service Requests.

3 Select the service request that is used to authorize the customer's accounts.

4 Click the hyperlink in the SR number (#) field.

5 In the Bill Pay Sign Up view of the Account Services view, click Unenroll.

Determining Whether a Customer Is Enrolled

Call center agents sometimes must verify whether a customer is enrolled in the electronic bill payment application of your company.

To determine whether a customer is enrolled

1. In Siebel Finance, navigate to the Contacts screen, then the Contacts List view.
2. In the visibility filter, select All Contacts.
3. In the Contacts list, select the contact.
4. In the Contacts form applet, click the show more button.

   If the Bill Pay Enrolled field is checked, then the customer is enrolled.

Reviewing Payees and Payments

Call center agents can review the list of payees that the customer selects and the scheduled payments.

To review the payees for a contact

1. In Siebel Finance, navigate to the Contacts screen, then the Contacts List view.
2. In the visibility filter, select All Contacts.
3. In the Contacts list, select a contact.
4. Click the hyperlink in the Last Name field.
5. Click the Bill Payment view tab.
6. Click the Payees or the Payments Scheduled link.

   You can view payments scheduled as a list or chart.

Using Siebel eBanking and Siebel eBrokerage

This topic lists the tasks that customers might perform on a Siebel eBanking and a Siebel eBrokerage Web site.

To use Siebel eBanking or Siebel eBrokerage, customers perform the following tasks:

- "Transferring Money Into or Out of Accounts" on page 34
- "Adding Holdings" on page 34
- "Editing Holdings" on page 35
- "Adding Investment Interests" on page 35
- "Editing Investment Interests" on page 36

Transferring Money Into or Out of Accounts

A user can use a pop-up applet to select a financial institution to transfer funds into and out of. The default behavior displays the identical list of financial institutions for both transfer money in and out operations.

After accounts are established for the financial institutions that money transfers to or from, customers can request a funds transfer into or out of their account with the host institution.

To transfer funds into or out of an account

1. In the Siebel eBanking Web site or the Siebel eBrokerage Web site, click the Transfers tab.
2. Click the Transfer Money In hyperlink or Transfer Money Out hyperlink.

   The Transfer Money In or Transfer Money Out applet appears.
3. Click the select button in the Transfer From Account or Transfer To Account field.

   The Account Information dialog box appears.
4. Select an account from the list.
5. If the account that you want to use for transferring funds is not listed in the Account Information dialog box, then complete the following steps:
   a. Click New to add the account.
   b. Complete the fields, and click Submit.

      The Account Information dialog box appears with the new account added to the list.
   c. Select an account from the list.

      The Transfer Money In or Transfer Money Out applet appears with the selected account in the Transfer From Account field or Transfer To Account field.
6. Complete the remaining fields, and click Save.

   A service request is submitted for the funds transfer.

Adding Holdings

The Holdings applet on the Relationship page displays a list of investments that the for the user's account. To view or add holdings, a contact user must be associated with at least one account, which must be marked as the primary account. You can establish this relationship in the Contacts screen in Siebel Finance.

NOTE: Adding a holding is not the same as making a trade. Adding a holding is for tracking purposes, and the holding is not part of the customer portfolio at the institution. If customers purchase a security through the Trades page, then their portfolio automatically updates their holdings accordingly.

To add a holding

1. In the Siebel eBrokerage Web site, click the Relationship tab.
2. Click the Holdings hyperlink.

   The Holdings applet appears.

3. Click Add New Holding.
4. In the Holdings form, click the select button in the Ticker field.
5. In the Pick Security dialog box, select a security from the list.
6. Complete the other appropriate fields in the Holdings form, and click Save.

   The holding is added to the list.

Editing Holdings

Customers can edit a holding.

To edit a holding

1. In the Siebel eBrokerage Web site, click the Relationship tab.
2. Click the Holdings hyperlink.

   The Holdings applet appears.

3. Click the icon in the Edit column for the holding that you want to edit.

   NOTE: If you click the hyperlink in the Symbol field, then detailed information about the holding appears.

4. In the Holdings form, edit the fields, and click Save.

Adding Investment Interests

The Interests applet on the Relationship page displays a list of potential investments in which the user expresses interest.

To add an interest

1. In the Siebel eBrokerage Web site, click the Relationship tab.
2. Click the Interests hyperlink.

   The Interests applet appears.

3. Click Add New Interest.
4. In the Interests form, click the select button in the Ticker field.
5. In the Pick Security dialog box, select a security from the list.

6. Complete the other appropriate fields in the Interests form, and click Save.

   The interest is added to the list.

Editing Investment Interests

Customers can edit an interest.

To edit an interest

1. In the Siebel eBrokerage Web site, click the Relationship tab.
2. Click the Interests hyperlink.

   The Interests applet appears.

3. Click the icon in the Edit column for the interest that you want to edit.
4. In the Interests form, edit the fields, and click Save.

3 Siebel Insurance eService

This chapter describes Siebel Insurance eService, and provides information about how to administer and use Siebel Insurance eService. It includes the following topics:

- About Siebel Insurance eService on page 37
- Features in User Interface for Siebel Insurance eService on page 38
- Administering Siebel Insurance eService on page 41
- Using Siebel Insurance eService on page 47

About Siebel Insurance eService

Siebel Insurance eService is a Web portal through which customers can resolve service issues and view information related to their insurance policies. Some features are available to you only if your company also licenses Siebel Insurance or Siebel Healthcare product options.

Siebel Insurance eService allows your customers to perform the following tasks:

- View policy data.
- Submit service requests, attaching supporting documents, if needed.
- Report and check the status of insurance claims.
- View and download forms.
- View the current cash value of policies.
- Search for and change healthcare providers.
- Perform a full text search of a knowledge base of frequently asked questions (FAQs) to help resolve a service issue.
- Submit customer satisfaction surveys to give feedback about the service that they receive.
- Send an email to a service agent.
- Register for health-related classes.
- Locate health clubs that provide discounts for members of health plans.
- Find out whether their health plan policy covers a drug.
- Locate affiliated pharmacies.
- Research drug interaction information.
- Locate affiliated businesses that perform work related to an insurance claim.

Siebel Insurance eService provides the following additional features:

- Responsibilities that allow different customers to see different applets on the Siebel Insurance eService Web site.
- Web pages, views, and applets that you can configure to conform to your business model.
- A salutation applet that greets a registered user after login. You can configure this applet to contain any targeted content, such as promotions, service request update information, or a birthday greeting.
- Contact-based login that minimizes the number of accounts required to support all customers receiving Web-based support.
- Contact-based data visibility that allows customers to see only their own or their household data.
- A history of each user that is readily available to the service agent and that is independent of the channel of communication that the user chooses.

Features in User Interface for Siebel Insurance eService

This topic describes the user interface features that are available in Siebel Insurance eService.

Home Page

When a customer first opens the Siebel Insurance eService Web site, the home page that appears includes a login applet. If you implement responsibilities, then customers who are assigned different responsibilities see different applets after they log in.

The Salutation applet greets each customer with a personalized phrase and targeted information. Customers can view and access their personal policies, their group benefits, and frequently asked questions (FAQs). In the Search applet on the home page and on most pages, customers can perform full text searches of records to resolve service issues on their own.

Literature Page

In the Literature page, users can search for and use insurance related literature, such as pamphlets and brochures.

A form must meet the following requirements to appear in the Literature page or to appear in the search results using the Find Form applet:

- It must reside in Siebel files.
- Its record in the Literature table must have an Internal field value of FALSE, thus allowing external publication.
- Its record in the Literature table must have a Literature Type field value of Self-Service Form.
- It must be associated with the organization with which the Web site visitor is associated, that is, the organization of the proxy employee through which the user gets data visibility.

eEvents Page

Customers can view information about future events, such as health-related seminars on the eEvents page.

Service Requests List

Customers can submit service requests, check the status of existing service requests, submit a customer satisfaction survey, and view frequently asked questions.

Personal Policies List

A personal policy is a contract of insurance with an individual, and not a group. Examples of personal policies are personal life insurance policies and individual health insurance policies. All contacts listed on a policy, both primary insureds and others, can see the policy.

In the Personal Policies / Quotes applet, members can perform the following tasks:

- Check the insureds on their policies.
- View the coverage details of their policies.
- Search for and view the profiles of care providers.
- Change primary care providers.
- Check the status of service requests.
- Submit service requests.
- Find the current cash value of their life insurance policies.
- Submit requests for withdrawals from their life insurance policies.
- View and request loans against their life insurance policies.
- View and request financial transfers relating to their life insurance policies.
- View driver and vehicle information.
- Report a claim.

Group Benefits List

A group policy is a contract with a group to provide insurance to its members. Usually the group is an employer and the members are its employees. After a group policy is established, employees can opt to be covered by the policy by enrolling. After enrolled, the employees are commonly known as members.

Types of group insurance include group health insurance and group life insurance. An employer group often offers group insurance to employees, so *group benefits* is often used interchangeably with *group insurance*.

Members can perform the following tasks with their group policies:

- Check the members on their policies.
- View eligibility and benefits information.
- Search for and view profiles of care providers.
- Change primary care providers.
- Check the status of service requests.
- Submit service requests.

NOTE: All contacts listed on the policy, both primary insureds and others, can see a policy. However, a person who is a primary member of a group policy, but is not an insured member, cannot see the policy.

Claims List

Customers can check the status of existing claims and report new claims from a Siebel Insurance eService Web site. They report and view claims by clicking the View Claims and Claim Payments hyperlink.

My Profile Hyperlink

Customers can edit contact information and passwords.

Help Hyperlink

Customers can get help using the Siebel Insurance eService application.

Contact Us Hyperlink

Customers can send messages to service agents.

Log In/Out Hyperlink

Customers click this hyperlink to enter or exit the Siebel Insurance eService application.

Administering Siebel Insurance eService

This topic lists the tasks that are specific to Siebel Insurance eService. For information about administrative tasks that are consistent in Siebel Financial Services, see *Siebel eService Administration Guide*.

To administer Siebel Insurance eService, administrators perform the following tasks:

- "Creating Responsibilities for Siebel Insurance eService" on page 41
- "Setting Up Provider Search for Siebel Insurance eService" on page 42
- "Setting Up Classes and Seminars for Siebel Insurance eService" on page 43
- "Setting Up Health Club Discounts" on page 43
- "Setting Up Alternative Medicine Search" on page 44
- "Setting Up Pharmacy Locator" on page 44
- "Setting Up Formulary Search" on page 45
- "Setting Up a Link To Drug Interactions Information" on page 45
- "Displaying Auto Policy Coverage Comparisons" on page 46
- "Setting Up Printable Online Documents for Siebel Insurance eService" on page 46
- "Administering Partner and Claim Center Locators" on page 46
- "Setting Up Service Provider Search" on page 46

Creating Responsibilities for Siebel Insurance eService

You can use responsibilities for the following functionality:

- Control the pages and applets that different customers see when they log in to your Web site.
- Guide customers in performing tasks that apply to them by providing a task applet on the home page that has links to the places on the Web site where they can complete the tasks. Customers with different responsibilities see different task lists.

Siebel Insurance eService includes the following preconfigured responsibilities that you can use to create responsibilities-based home pages:

- **Healthcare Member.** Users with the Healthcare Member responsibility see the Health & Wellness Services applet and the Pharmacy Services applet on the home page. They also see healthcare-specific task links in the Customer Services applet.
- **Insurance Member.** Users with the Insurance Member responsibility see the Contact Us applet and the Service Your Policy applet on the home page. They also see insurance-specific task links in the Customer Services applet.

Set up responsibilities in Siebel Finance. For detailed instructions about setting up a new responsibility, see *Siebel Security Guide*.

The general steps, along with information specific to Siebel Insurance eService, follow:

1. **Create a responsibility record.** Create a responsibility record in the Responsibilities view of the Administration - Application screen.
2. **Create tasks for the responsibility.** For each task that you want to appear in the task applet on the home page, create a record that is associated with the responsibility record. Make sure that you use the Home Page Tasks value for the Group field.
3. **Select applets to appear using personalization.** To make an applet appear to a user who has a particular responsibility, set a conditional expression for the applet in the Administration - Personalization screen. For example, the conditional expression for the FINS FSW Health Wellness Center Links Applet is GetProfileAttr ("Primary User Role Name") <> 'Insurance Member'. This expression indicates that users with the Insurance Member responsibility do not see this applet.

   You can obtain a list of the applets that are associated with the Insurance Member and Healthcare Member responsibilities by querying for the word *Member* in the Conditional Expression field of the Applets list.
4. **Assign users to responsibilities.** Assign users to the new responsibility using the Administration - User screen of Siebel Finance. When users log in, they see only information that is specific to their responsibility.

Setting Up Provider Search for Siebel Insurance eService

A user with the responsibility of Healthcare Member can search for providers that contract with the health plan by clicking the Provider Search hyperlink in the Customer Services applet, selecting the enrolled product, and clicking the Find Provider icon. The customer can set search criteria, such as specialty or location. The resulting list includes providers that meet all of the criteria.

Only providers that are contracted providers for a health product are included in the list of providers or in the provider search list for that product.

Criteria that customers enter into text fields must not contain quotes. Text strings in a field can use AND, OR, or NOT as connectors. Criteria can contain wildcards. The asterisk (*) is a wildcard for any string, and the question mark (?) is a wildcard for any character. For example, searching on dat* finds records containing date, database, data source, and so on. Searching on dat? finds records containing date, data, and so on.

Set up provider search. For detailed instructions about setting up provider search, see *Siebel Healthcare Guide*.

The general steps, along with information specific to Siebel Insurance eService, follow:

1. **Add a provider.** Add a provider in the Providers screen of Siebel Finance.
2. **Add addresses.** Add one or more addresses for the provider in the Addresses view of the Providers screen and click Update Geo Code. If geocode data exists in the Zip Code Administration view of the Administration - Data screen, then the longitude and latitude information are automatically entered.

3. **Associate products.** Add one or more contracted products for the provider in the Contracts view of the Providers screen.
4. **Associate specialty.** Add a specialty for the provider in the Specialties view of the Providers screen.

   If you want to add a new type of specialty, then you must add a new List of Values record with a Type field of FINS_AGDESG_HLTHSPEC_MLOV. For the Order field, select a value between 60 and 155 to display the value in the Specialty drop-down list. In Siebel Tools, set a search specification for the associated picklist (FINS PickList Health Provider/Facility Specialty).

Setting Up Classes and Seminars for Siebel Insurance eService

The Health & Wellness Services applet of Siebel Insurance eService has a Classes and Seminars hyperlink that users with the responsibility of Healthcare Member can click to learn about and register for upcoming events. Only future events are listed in the Upcoming Events applet on the Web site. For more information about creating events, see *Siebel Events Management Guide*.

NOTE: You need a license for Siebel eEvents to use this functionality.

To create a class or seminar event

1. In Siebel Finance, navigate to the Events screen, then the Events view.
2. In the visibility filter, select All Events.
3. Create a new event record, complete all the required fields, and make sure that you place a check mark in the External field.
4. Click the Sub-Events view tab.

   The value you select for the Sub-Event Frequency field, the Start field, and the End field determine the Subevents that are automatically created.
5. In the Sub-Events list, click a hyperlink in the Name field.
6. Enter the appropriate details for each subevent into the More Info form.

   Make sure that you select either In Progress or Executing for the Status field.

Setting Up Health Club Discounts

The Health & Wellness Services applet of Siebel Insurance eService has a Health Club Discounts hyperlink that users with the responsibility of Healthcare Member can click to see a list of local health clubs with reduced rates for members of the healthcare plan.

To set up a healthcare discount

1. In Siebel Finance, navigate to the Administration - Campaign Management screen.

2 Add a record, complete the necessary fields, and make sure that you enter Health Club Discount for the Name field.

For more information about creating a campaign, see *Siebel Marketing User Guide*.

3 Navigate to the Administration - Application screen, then the System Preferences view.

4 In the System Preferences Name field, query for *Campaign.

5 Verify that the INSeService Discount Campaign has a System Preference Value of Health Club Discount.

6 Navigate to the Offers screen.

7 In the All Offers list, add a record, complete the necessary fields, make sure that you select Web-Announcements for the Type field, and enter a description of the offer.

8 In the Administration - Campaign Management screen, select the campaign that you defined in Step 2, and in the Offers list add the offer that you defined in Step 7.

For more information about creating offers, see *Siebel Marketing User Guide*.

Setting Up Alternative Medicine Search

The Health & Wellness Services applet of Siebel Insurance eService has an Alternative Medicine Search hyperlink that users with the responsibility of Healthcare Member can click to find healthcare providers who practice alternative medicine. This feature uses a version of the Provider Locator. For information about adding a specialty to the list of values, see Step 4 on page 43. For more information, see "Setting Up Provider Search for Siebel Insurance eService" on page 42.

Setting Up Pharmacy Locator

The Pharmacy Services applet of Siebel Insurance eService has a Pharmacy Locator hyperlink that users with the responsibility of Healthcare Member can click to search for a local, affiliated pharmacy.

To add a pharmacy to the list of affiliated pharmacies

1 In Siebel Finance, navigate to the Facilities screen.

2 In the visibility filter, select All Facilities.

3 In the Facilities list, add a record, complete the necessary fields, make sure that you select Pharmacy in the Type field, and enter the address in the Primary Address field.

4 Click the hyperlink in the Facility field.

5 Click the Locations view tab.

6 In the Locations list, add a record, enter a location in the Location Name field, and in the Address field, select the address that you enter in Step 3.

7 If the Longitude and Latitude field values do not automatically populate, then set these values in the Zip Code Administration view of the Administration - Data screen.

Setting Up Formulary Search

The Pharmacy Services applet of Siebel Insurance eService has a Formulary Search hyperlink that users with the responsibility of Healthcare Member can click to find out whether a drug is listed in the formulary of their health insurance plan. If it is listed, then the customer's insurance covers some or all of the cost of the drug. The formulary is a document that the customer can read or search.

When the customer clicks the Formulary Search link, the formulary search applet opens, listing one or more formulary documents. The customer clicks the hyperlink for the appropriate formulary and can download or open the document. After the document is open, the customer can search the document for the drug of interest. For more information about working with literature, see *Siebel Applications Administration Guide*.

To set up formulary search

1. In Siebel Finance, navigate to the Administration - Document screen, then the Literature view.
2. Add a record, complete the necessary fields, and make sure that you select Formulary Literature in the Literature Type field.

Setting Up a Link To Drug Interactions Information

The Pharmacy Services applet of Siebel Insurance eService has a Drug Interactions hyperlink that customers with the responsibility of Healthcare Member can click to open a Web site that contains information about drug interactions. The preconfigured Siebel Insurance eService application has a link to the Centers for Disease Control and Prevention Web site for the United States.

To set the link to a drug interaction Web site

1. In Siebel Tools, select Applet in the Object Explorer.
2. Select FINS FSW Pharmacy Center Links Applet.
3. Click Control in the Object Explorer.
4. Select the ImageDrug record.
5. Click Control User Prop in the Object Explorer.
6. Set the Value field to the URL of the Web site that you want to open when the link is clicked.
7. Click Control in the Object Explorer.
8. Repeat Step 3 through Step 6 for the LinkDrug record.

Displaying Auto Policy Coverage Comparisons

In the Coverage and Premium applet of Siebel Insurance eService, customers can see a side-by-side comparison of the insurance premiums and coverage for each of their vehicles. The information in this applet is the same as the information in the Multi Vehicle Rate Model form of the Auto Policies screen of your Siebel Financial Services application. The employee adds the information when creating new auto policy records. For more information about creating auto policies, see *Siebel Insurance Guide*.

Setting Up Printable Online Documents for Siebel Insurance eService

You can display policy documents on your Siebel Insurance eService Web site to customers who have the responsibility of Insurance Member. To display an auto policy document, the customer selects the View Personal Policies hyperlink on the home page and clicks the hyperlink for the auto policy. In the Auto Policy applet, the customer clicks the Documents Online hyperlink and a list of auto policy documents appears. In the Property policy applet, the customer clicks the Documents Online hyperlink and a list of property policy documents appears.

The Siebel Reports server creates reports for auto and property policy documents. To set up this feature, you must enable Siebel Reports server for the Insurance eService Object Manager (ENU) server component. For information about how to enable Siebel Reports Server for the Web Client, see *Siebel Reports Guide*.

Administering Partner and Claim Center Locators

The Contact Us applet on the home page of Siebel Insurance eService has a Locate Nearby Partners hyperlink and a Locate Nearby Claims Centers hyperlink. When users with the responsibility of Insurance Member click one of these links, an applet opens in which they can perform a parametric search using location attributes that they select from drop-down lists. For information about how to administer the records in these searches, see *Siebel Insurance Guide*.

Setting Up Service Provider Search

When creating a self-service claim on a Siebel Insurance eService Web site, a customer can search for a partner business that can rectify the problem relating to the claim. Businesses might include auto body repair shops and electrical contracting companies. The service provider search is based on the Siebel Partner Locator.

To create a claim, the customer clicks the View Claims and Payments hyperlink in the Customer Services applet of the home page. The customer clicks the New button in the Claims applet, completes the necessary fields, and clicks the select button in the Pick Service Provider field. The customer then follows the instructions on the Service Providers applet and a list of partner service providers appears.

Create a service provider. For detailed instructions about how to create a service provider, see *Siebel Partner Relationship Management Administration Guide*.

The general steps, along with information specific to Siebel Insurance eService, follow:

1. **Add a partner.** In Siebel Finance, navigate to the Partners screen, add a record, complete the necessary fields, and make sure that you perform the following actions:
    - Complete the Address field.
    - Select Service Provider in the Partner Type field.
    - Check the Primary check box when selecting the partner type.
2. **Add a location.** For the new partner record, add a location record in the Locations list, selecting the address that you enter in Step 1.
3. **Associate an expertise.** For the new partner record, select a value for the Expertise field in the Profile form, and enter other required information.
4. **Approve the partner.** In the Administration - Partner screen, select the partner record that you added and click Register. Select the Organization check box.

Using Siebel Insurance eService

This topic lists the tasks that customers might perform on a Siebel Insurance eService Web site.

To use Siebel Insurance eService, customers perform the following tasks:

- "Viewing Personal Policy Information" on page 47
- "Viewing Information About Providers" on page 48
- "Changing Primary Care Providers (HMO only)" on page 48
- "Viewing Group Benefit Information" on page 48

Viewing Personal Policy Information

Customers can view personal policy information.

To view personal policy information

1. In the Customer Services applet of the Siebel Insurance eService Web site, click the View Personal Policies hyperlink.
2. In the Personal Policies / Quotes applet, click the hyperlink in the Policy number (#) / Quote number (#) field for the policy that you want to view.
3. Click the hyperlinks in the applet on the left of the page to see detailed information.

   The name of the applet changes depending on the selected link.

Viewing Information About Providers

Customers can view information about providers.

To view information about providers

1. In the Customer Services applet of the Siebel Insurance eService Web site, click the View Personal Policies hyperlink.

   If the link is not visible, then see "Creating Responsibilities for Siebel Insurance eService" on page 41.

2. In the Personal Policies / Quotes applet, click the hyperlink in the Policy number (#) / Quote number (#) field for the policy record with Health Quote in the Type field.
3. In the All Benefits for My Household applet, click the hyperlink in the Primary Care Provider field.

   The Provider Profile applet appears with information about the provider.

Changing Primary Care Providers (HMO only)

Customers can change primary care providers.

To change a primary care provider (HMO only)

1. In the Customer Services applet of the Siebel Insurance eService Web site, click the Change PCP hyperlink.
2. In the Benefits applet, click the search icon in the Change Primary Care Provider field for the product of interest.
3. Click the edit icon in the Select Primary Care Provider field for the provider that you want to change to.

   A note appears indicating that you changed your provider. The new primary car provider that you select does not appear in the field immediately. The new primary care provider eventually appears in the All Benefits for My Household list applet for the applicable household member.

Viewing Group Benefit Information

Customers can view group benefit information.

To view group benefit information

1. In the Customer Services applet of the Siebel Insurance eService Web site, click the View Group Policies hyperlink.

2. In the Group Benefits applet, click the hyperlink in the Group number (#) / Policy number (#) field for a policy.

   Information about the benefits for the household appears.

4 Siebel eEnrollment for Financial Services

This chapter describes Siebel eEnrollment for Financial Services, and provides information about how to administer and use Siebel eEnrollment for Financial Services. It includes the following topics:

- About Siebel eEnrollment for Financial Services on page 51
- Features in User Interface for Siebel eEnrollment for Financial Services on page 51
- Administering Siebel eEnrollment for Financial Services on page 53
- Using Siebel eEnrollment for Financial Services on page 54

About Siebel eEnrollment for Financial Services

Siebel eEnrollment for Financial Services is a Web-based interface that allows group members to enroll themselves and family members in health coverage available under the health policy for their group.

Siebel eEnrollment for Financial Services provides the following self-service features to group members:

- **Enrollment.** Member status determines how new and current members are guided through an enrollment process. Current members can view existing coverage and elect to remain under current coverage, or they can change coverage options. Normally, group members can enroll for coverage only during designated enrollment periods, such as when they join the company or during open enrollment.
- **Personal Profile Management.** Group members can update information, such as a name, address, and telephone number for themselves, family members, or their broker.
- **Provider search and assignment.** Group members can search a directory of primary care physicians (PCPs) or physicians in their network. They can add a PCP to their coverage selections at the time of enrollment. They can perform PCP searches using criteria, such as specialty, language spoken, and location.
- **Beneficiary designation.** Group members can select 401k benefits and add beneficiaries.

Features in User Interface for Siebel eEnrollment for Financial Services

In Siebel eEnrollment for Financial Services, users can access the following pages and utilities:

- **Home page.** The Salutation applet greets each user with a personalized phrase and targeted information. In the Search applet on the home page and on most pages, users can perform full text searches of records to resolve service issues on their own. For more information, see "Home Page" on page 52.
- **Literature page.** Users can view and download forms and product information. For more information, see "Literature Page" on page 52.
- **Contact Us list.** Users can send messages to service agents.
- **Enrollment list.** Users can enroll in an insurance plan or review existing coverages.
- **Top FAQs list.** Users can select from a list of the most common support questions.
- **Announcements list.** Users can see the latest news and special offers.
- **Help hyperlink.** Users can receive help using the Siebel eEnrollment for Financial Services application.
- **Log In/Out hyperlink.** Users click this hyperlink to enter or exit the Siebel eEnrollment for Financial Services application.

Home Page

The home page appears to all users, before and after they log in. When the user first navigates to the Siebel eEnrollment for Financial Services application, the home page appears with a login applet. A customized home page appears after the user logs in.

Literature Page

In the Literature page, users can search for and use health insurance-related literature, such as pamphlets and brochures.

A form must meet the following requirements to appear in the Literature page or to appear in the search results using the Find Form applet:

- It must reside in Siebel files.
- Its record in the Literature table must have an Internal field value of FALSE, thus allowing external publication.
- Its record in the Literature table must have a Literature Type field value of Self-Service Form.
- It must be associated with the organization with which the Web site visitor is associated, that is, the organization of the proxy employee through which the user receives data visibility.

Administering Siebel eEnrollment for Financial Services

This topic lists the tasks that are specific to Siebel eEnrollment for Financial Services. For information about administrative tasks that are consistent in Siebel Financial Services, see *Siebel eService Administration Guide*.

To administer Siebel eEnrollment for Financial Services, administrators perform the following tasks:

- "Displaying Product Attributes to eEnrollment Users" on page 53
- "Setting Up Provider Search for Siebel eEnrollment for Financial Services" on page 53.

Displaying Product Attributes to eEnrollment Users

Product attributes that are inherited from the class to which the product belongs are called dynamic attributes. For more information about product attributes, see *Siebel Product Administration Guide*.

By default, eEnrollment users do not see dynamic attributes. To display these attributes to users, you must select the Display to User check box.

To display dynamic product attributes to eEnrollment Users

1. Navigate to the Administration - Application screen, then the Class Administration view.
2. In the Classes list, select the class with attributes that you want to appear to users.
3. Click the Dynamic Attributes view tab.
4. In the Dynamic Attributes list, select the Display to User check box in all records for attributes that you want to appear to users.

Setting Up Provider Search for Siebel eEnrollment for Financial Services

A member of a health plan can search for health plan providers that meet user-defined criteria, such as specialty or locale. The member can enter search criteria in one or more of the ten fields in the Find Provider form applet. The resulting list includes providers that meet all of the criteria.

Only providers that are contracted providers for a member's health product are included in the list of providers or in the provider search list for that product.

Text fields in the Find Provider form applet include First Name, Last Name, Street Address, City, and Postal Code.

Criteria in text fields must not contain quotes. Text strings in a field can use AND, OR, or NOT as connectors. Criteria can contain wildcards. The asterisk (*) is a wildcard for any string, and the question mark (?) is a wildcard for any character. For example, searching on dat* finds records containing date, database, data source, and so on. Searching on dat? finds records containing date, data, and so on.

Table 16 shows the lists of values that populate the fields in the Find Provider form applet.

Table 16. List of Values for Find Provider Form Fields

Field	List of Values
Primary Specialty	FINS_HLTH_SPECIALTY
All Specialties	FINS_HLTH_SPECIALTY
State	STATE_ABBREV
Country	COUNTRY
Panel Status	FINS_HLTH_PANEL

Using Siebel eEnrollment for Financial Services

This topic lists the tasks that customers might perform on a Siebel eEnrollment for Financial Services Web site.

To use Siebel eEnrollment for Financial Services, customers perform the following tasks:

- “Enrolling for Insurance Coverage” on page 54
- “Designating a Beneficiary” on page 56
- “Displaying Providers” on page 56

Enrolling for Insurance Coverage

When a customer logs in to Siebel eEnrollment for Financial Services, a list of policies that are currently available for enrollment appears. In a policy, the customer can select options for enrollment, such as vision, dental, and life insurance coverage, in addition to major medical.

Table 17 shows the products and options that customers can specify.

Table 17. Products and Options for Policies

Product	Options
All	Members and effective dates
HMO	Primary care physician

Table 17. Products and Options for Policies

Product	Options
PPO	Primary care network (corresponds to Facility in Siebel Financial Services)
Group Life	Beneficiaries
VGL	Beneficiaries and amount for each covered member
401K	Beneficiaries

Adding Family Members to Enrollable Members List

Complete the procedure in this topic to add family members to the list of enrollable members.

To add a family member to the list of enrollable members

1. In the Enrollment applet of the Siebel eEnrollment Web site, click the Begin Enrollment hyperlink.
2. In the Family Members applet, click New.
3. In the Family Members form, complete the fields, and click Save.

Enrolling Family Members for Coverage

Before individuals can enroll themselves in policies for which they are eligible, the primary enrollee must be associated with a group policy that has a Status field of Enforce and a Sub Status field of Renewal. The value in the Sub Status field triggers the availability of the Siebel eEnrollment for Financial Services application for that policy.

In each organization, a person enters this information about individuals. In smaller organizations, this person is typically an owner or officer. In larger organizations, this person is typically a human resources representative.

To enroll a family member for coverage

1. In the Enrollment applet of the Siebel eEnrollment Web site, click the Begin Enrollment hyperlink.
2. In the Policies Available for Enrollment applet, select a policy.
3. Click the select button in the Last Name field.

   The list of enrollable members appears. For information about adding members to this list, see the other task in this topic.
4. Select a member to enroll.
5. If appropriate, select a primary care physician (PCP).
6. Click Save.

Designating a Beneficiary

As part of the enrollment process, you must designate beneficiaries for some types of products, such as 401K accounts and life insurance policies.

To name a beneficiary

1. In the Enrollment applet of the Siebel eEnrollment Web site, click the Review Prior Coverage hyperlink.
2. In the Member Selected Products applet, click Enroll for the product that you want to enroll in.
3. In the Enrollment Elections applet, click New.
4. Complete the fields, and click Save.

   For more information about naming beneficiaries, see "Enrolling for Insurance Coverage" on page 54.

5. In the Add Beneficiaries field, click Add for the member that you are enrolling.
6. In the Beneficiaries applet, click Enroll Beneficiary.
7. Complete the fields.

   If multiple beneficiaries share the proceeds, then use the Percentage field to indicate the percentage of the proceeds that are allocated to this beneficiary. The total percentage of all beneficiaries must equal 100%. For information about adding members to the list of people who you can designate as beneficiaries, see "Enrolling for Insurance Coverage" on page 54.

8. Click Continue.

Displaying Providers

A provider or contracted provider is a doctor who contracts with a health plan to provide care to members. You can designate a provider as a primary care provider (PCP) for one or more products that the health plan offers. Typically, members receive regular health maintenance from their primary provider and consult the primary provider before seeing specialists for a health problem.

Members can perform the following tasks:

- View profile information about providers.
- Search for providers using criteria that they provide.
- Change their primary care provider.

Only providers that are contracted providers for a member's health product are included in the list of providers or in the provider search list for that product.

NOTE: You can search for providers in two pages. By clicking Locate Nearby Providers on the home page, you can search for providers, but you cannot choose them as your primary care physician. You must follow the enrollment process to choose a provider as your primary care physician.

5

Siebel eCustomer for Financial Services

This chapter describes Siebel eCustomer for Financial Services. It includes the following topics:

- About Siebel eCustomer for Financial Services on page 57
- Features in User Interface for Siebel eCustomer for Financial Services on page 57

About Siebel eCustomer for Financial Services

Siebel eCustomer for Financial Services uses a combination of functionality from Siebel eBanking, Siebel eSales, and Siebel Insurance eService. It is an online sales and service application for diversified financial institutions that offer a range of product lines.

Features in User Interface for Siebel eCustomer for Financial Services

In Siebel eCustomer for Financial Services, users can access the following user interface features:

- **Home page.** The Salutation applet greets each user with a personalized phrase and targeted information. In the Search applet the home page and on most pages, users can perform full text searches of records to resolve service issues on their own. For more information. see "Home Page" on page 58.
- **Top FAQs list.** Users can select from a list of the most common support questions.
- **Contact Us list.** Users can send messages to service agents.
- **Accounts list.** Users can access their accounts from this list.
- **Personal Policies list.** Users can view personal policy details, check the status of claims and existing service requests, and submit new service requests.
- **Group Benefits list.** Users can view group benefit details, search for primary care providers, and change primary care providers.
- **Claims list.** Users can check the status of claims.
- **Service Requests list.** Users can track their service requests.
- **Enrollment list.** Users can enroll in an insurance plan or review existing coverages.
- **Special Offers list.** Users can view a list of offers.
- **Applications list.** Users can access other applications.
- **Recommended Products list.** Users can access a customized list of products.

- **My Account hyperlink.** Users can access personal settings, insurance policies, and related pages. The Tools hyperlink provides access to Siebel eSales SmartScripts and loan calculators. The Applications hyperlink provides access to Siebel eSales applications functionality. The Siebel eBanking hyperlink provides access to personal settings, insurance policies, and other Siebel eBanking pages.
- **Help hyperlink.** Users can receive help using the Siebel eCustomer for Financial Services application.
- **Log In/Out hyperlink.** Users click this hyperlink to enter or exit the Siebel eCustomer for Financial Services application.

Home Page

The home page appears to all users, before and after they log in. When the user first navigates to the Siebel eCustomer for Financial Services application, the home page appears with a login applet. A customized home page appears after the user logs in.

6 Siebel eService for Automotive

This chapter describes Siebel eService for Automotive, and provides information about how to administer Siebel eService for Automotive. It includes the following topics:

- About Siebel eService for Automotive on page 59
- Differences Between Siebel eService and Siebel eService for Automotive on page 60
- Features in User Interface for Siebel eService for Automotive on page 60
- Administering Siebel eService for Automotive on page 66

About Siebel eService for Automotive

In the automotive industry, manufacturers want to develop an ongoing relationship with customers to increase customer satisfaction and loyalty. Siebel eService for Automotive provides the following features that allow vehicle manufacturers to create and maintain a relationship with their customers:

- **Anonymous browsing.** Unregistered users can view a home page that allows them to contact the manufacturer, view top frequently asked questions, search the knowledge base, troubleshoot problems, view instructions, ask questions in natural language, and view recommended items for sale.
- **Dealer Locator.** Both registered and unregistered users can search for dealers who are nearest to them.
- **Contact information.** Both registered and unregistered users can contact the OEM (Original Equipment Manufacturer).
- **User registration.** Users can register and enter information about themselves. You can see the information in the Contacts screen of Siebel Automotive.
- **Vehicle registration.** Customers can register vehicles that they own and that your company manufactures. You can see the information in the Vehicle screen of Siebel Automotive and the associated contact records for the customers.
- **Preventive maintenance.** Customers can see upcoming maintenance actions for their vehicles. You can set up preventive maintenance plans for the makes of vehicles that you manufacture.
- **Online service requests.** Customers can enter service requests for car service, and they can route service requests directly to a dealer. A dealer contacts them to make an appointment.
- **Online inventory search.** If customers want to buy a car with a specific make, model, and year, then they can search the inventory of your dealers to see the dealers that have the car that they want.
- **Online service history.** Customers can see their past service history.
- **Online order status.** Customers can check the status of their orders.

Differences Between Siebel eService and Siebel eService for Automotive

The most important differences between Siebel eService and Siebel eService for Automotive include the following differences:

- **Audience.** *Siebel eService Administration Guide* is generally for any company that provides service through the Web. Siebel eService for Automotive is specifically for *manufacturers* or *OEMs (Original Equipment Manufacturers)* in the automotive industry.
- **Cross-references.** *Siebel eService Administration Guide* often refers to *Siebel Applications Administration Guide* for more information. For Siebel eService for Automotive, in addition to this guide, see *Siebel Automotive Guide*.
- **Differences in the Siebel eService Portal.** The portal that the customer views has added and modified features specifically for automobile customers.
- **Differences in Administering Siebel eService.** The added or modified features of the customer portal generally require added or modified administrative tasks.

Features in User Interface for Siebel eService for Automotive

The home page of Siebel eService allows new users to register and provides both anonymous and registered users with links to more information.

The home page of Siebel eService for Automotive includes the following differences from the home page of Siebel eService:

- **Link to the Dealer Locator.** The Contact Us applet has a link to the Dealer Locator instead of a link to the branch locator. For more information, see "Dealer Locator" on page 61.
- **Link to My Vehicles.** The home page has a link to My Vehicles, which is unique to Siebel eService for Automotive. For more information, see "My Vehicles View" on page 63.
- **Link to register a vehicle.** The My Account applet has a link to register a vehicle instead of a link to register a product. For more information, see "Vehicle Registration" on page 64.
- **Link to My Service History.** The home page has a link to My Service History, which is unique to Siebel eService for Automotive. For more information, see "Service History" on page 65.

Global buttons are visible when the user displays any page of Siebel eService. The following global buttons have different functions in Siebel eService for Automotive:

- **Contact Us.** Displays the Contact Us view, which lists different ways of contacting the OEM (Original Equipment Manufacturer), including email, postal mail, fax, a feedback form, telephone, and direct collaboration with a customer care representative. The Contact Us view of Siebel eService for Automotive has a link to the Dealer Locator, instead of a link to the Branch Locator. For more information, see "Dealer Locator" on page 61.
- **Inventory Search.** Displays Inventory Search view, which is unique to Siebel eService for Automotive. For more information, see "Inventory Search for Vehicles" on page 61.

- **My Account.** Displays the My Account view. For more information, see "My Account View" on page 62.

These differences in the home page and global buttons might be important to you if you configure Siebel eService. For more information about configuring Siebel eService, see *Siebel eService Administration Guide*.

NOTE: To make the Siebel eService for Automotive home page visible to customers, you must configure the application using Siebel Tools. After you configure the application, the home page appears when the customer clicks the Service button in Siebel eCustomer for Financial Services and when the customer logs in to eService. For information about making the home page visible to customers, see *Siebel System Requirements and Supported Platforms* on Oracle Technology Network.

Dealer Locator

New or existing customers can use the Dealer Locator to find the dealer nearest to them so that they can purchase a vehicle or get service for a vehicle.

Both anonymous and registered users can use the Dealer Locator by clicking the Locate Nearby Dealer link on the home page or by clicking the Contact Us global button and then clicking the Locate Nearby Dealer link.

Customers can enter the following information:

- **Location.** Customers enter either their ZIP code or their city, state and country.
- **Category.** Customers use the drop-down list to specify a dealer, a service center, or either.
- **Make.** Customers use the drop-down list to specify the make of the car.
- **Search Range.** Customers use the Distance In (miles or kilometers) and Search Range fields to specify the acceptable distance from their location to the dealer location.

When the customer clicks Search, the results include all dealers that meet the entered criteria.

The Dealer Locator searches through all the dealers that you enter in the Dealer Locator Administration view in Siebel Automotive. For more information about entering dealers in the Dealer Locator Administration view, see the information about Siebel Automotive tools in *Siebel Automotive Guide*.

Inventory Search for Vehicles

Potential customers can find exactly the vehicle that they want by using your Siebel eSales Web site, by looking at your marketing material, or in some other way. Then, because virtually all vehicle sales are through dealers, they can see whether any dealers near them have that vehicle in the current inventory. Both anonymous and registered users can click the Inventory Search global button to use the Inventory Search view. For more information about making a vehicle available in a dealer's inventory, see the information about Siebel Automotive Tools in *Siebel Automotive Guide*.

Customers enter the following information:

- **Their location.** If customers want the vehicle at the nearest dealer, then they can enter either their ZIP code or their city, state, and country.
- **New / Used Type.** Customers use the drop-down list to specify whether they want a new or used car.
- **From / To Model Year.** If customers want a used car, then they use these fields to specify the range of years for the car.
- **Make.** Customers use the drop-down list to specify the make of the car.
- **Model.** Customers use the drop-down list to specify the model of the car.
- **Trim.** Customers use the drop-down list to specify the trim of the car.
- **MSRP Less Than.** Customers enter the maximum price that they want to pay for the car. This field applies to both new and used cars. The price is taken from the MSRP field of the vehicle record.
- **Mileage Less Than.** If customers want a used car, then they can enter the maximum mileage for the car.
- **Search Range.** Customers use the Distance In (miles or kilometers) and Search Range fields to specify the acceptable distance from their location to the dealer location.

When the user clicks Search, the results include all vehicles that meet the entered criteria.

NOTE: Inventory search functions properly when you enter only one location for each dealer in the Dealer Locator Administration view. If one dealer has multiple locations, then inventory search might not function properly because a vehicle is tied to a dealer, not to a dealer location.

Inventory search uses information that you enter in the Vehicle screen of Siebel Automotive. A vehicle is available in a dealer’s inventory when the vehicle includes the following values in the designated fields of the Vehicle form:

- Available value in the Status field
- Dealer value in the Owned By field
- The dealer name in the Account field

My Account View

The My Account view is a central location with links to all the personalized information for a registered user. Registered users can display the view by clicking the My Accounts global button, which is not available to unregistered users. Customers can use the My Account view as a dashboard to access all of their information in Siebel eService.

The My Account view in Siebel eService for Automotive is different from the My Account view in Siebel eService.

The My Information applet in the My Account view includes the following links:

- **My Vehicles.** Displays the My Vehicles view with a list of all the customer’s vehicles. For more information, see “My Vehicles View” on page 63.

- **Register New Vehicle.** Allows the customer to register a new vehicle. For more information, see "Vehicle Registration" on page 64.
- **My Service Requests.** Displays the My Service Requests view with a list of the customer's service requests. For more information, see "Service Requests" on page 64.
- **My Service History.** Displays the Service History view. For more information, see "Service History" on page 65.
- **My Orders.** Displays the customer's pending orders with information about the status of each order.

The My Company's Information applet is similar to the My Information applet in Siebel eService. The My Company's Information applet includes links to My Company's Service Requests and My Company's Orders, which are similar to the corresponding links in the My Information applet, except that they display lists of all data that is associated with the customer's company. A customer can have multiple accounts, so you must choose the appropriate account before you can see the relevant information.

The My Settings applet is similar to the My Settings applet in Siebel eService. The My Settings applet lets customers enter or modify their user profile, address book, and subscriber preferences.

My Vehicles View

Customers display the My Vehicles view by clicking the My Vehicles link in the My Account view. The My Vehicles view displays a list of all the vehicles that are registered with the customer as a primary contact. The customer can click the VIN number (#) field in the Vehicles list to display a form applet with information about that vehicle and the following lists:

- **PM Actions list.** Displays preventive maintenance actions for that vehicle and when each action is scheduled. For more information, see "Preventive Maintenance" on page 63.
- **Service History list.** Displays the service history for that vehicle. For more information, see "Service History" on page 65.
- **Attachments list.** Displays attachments for that vehicle. The customer can add and view attachments in this list. The OEM (Original Equipment Manufacturer) can add and view attachments in the Attachments view of the Vehicle screen of Siebel Automotive.

Preventive Maintenance

The OEM (Original Equipment Manufacturer) can set up regular schedules of preventive maintenance for vehicles.

For example, a make of vehicle might require basic maintenance, such as replacing the oil filter and changing the oil, every 3,000 miles or three months, whichever comes sooner. The vehicle might also require more extensive maintenance, such as replacing spark plugs, at 30,000 miles or three years after purchase and at 60,000 miles or six years after purchase, whichever comes sooner. This maintenance can be more frequent if the vehicle is driven in demanding conditions. In addition, the vehicle might require preventive maintenance if its oil pressure is low, its coolant temperature is high, or it has other specific problems.

By default, Siebel eService for Automotive allows customers to view a list of preventive maintenance actions for their vehicles. The customer displays preventive maintenance actions by going to the My Account view of Siebel eService for Automotive and clicking the My Vehicles link. The My Vehicles list appears, and the user can click the VIN number (#) field of any vehicle to display a My Vehicles form with information about that vehicle and a PM Actions list with all future preventive maintenance actions for that vehicle. The customer can update the time and odometer reading after completing an action.

Visibility of Preventive Maintenance Actions to Customer

To allow the customer to display preventive maintenance actions, perform the following tasks:

- Create preventive maintenance plans.
- Set triggers for the preventive maintenance plans.
- Associate each preventive maintenance plan with a vehicle model and with a specific vehicle.

For information about these preventive maintenance tasks, see *Siebel Automotive Guide*.

Vehicle Registration

Customers can use Siebel eService for Automotive to register their vehicles. You can find information about the user in the Contacts screen of Siebel Automotive, and you can use this information for follow-up marketing and service. For more information about working with contacts and associated vehicles, see *Siebel Automotive Guide*.

A registered user of Siebel eService for Automotive can register a new vehicle by performing the following actions:

- Click the Register New Vehicle link in the My Account view.
- Click New in the My Vehicles list.
- Click the Register New Vehicle link in the home page.

The user must begin by entering the VIN (Vehicle Identification Number). If the entry matches a VIN in the Siebel database, then the user can continue. If the entry does not match a VIN in the Siebel database, then the user cannot continue because the vehicle is not one of your vehicles.

After the user enters a valid VIN, the Make, Model, Year, and Trim fields are populated automatically with information from the vehicle record. The user enters personal information, which is stored in the record of the primary contact associated with that vehicle. If there is already a primary contact for a vehicle, then the customer cannot register that vehicle.

Service Requests

A service request might involve a problem with a vehicle, such as squeaking brakes, a request to add new accessories to the vehicle, or a request for information.

In the automotive industry, dealers generally handle service requests. Siebel eService for Automotive allows the customer to route service requests directly to a dealer. If the customer does not route a service request to a dealer, then the OEM (Original Equipment Manufacturer) must route the service request to the appropriate dealer so that the dealer can contact the customer and make an appointment to fulfill the service request. You can route certain types of service requests, such as requests for information, to the appropriate department of the OEM for fulfillment.

Customers can enter service requests by going to the My Account view, clicking the My Service Requests link, and clicking New in the My Service Request list.

Service requests in Siebel eService for Automotive include the following enhancements that are specific to the automotive industry:

- **VIN#.** Customers click the select button of the VIN number (#) field to select the vehicle that the service request applies to and to view full information about the vehicle.
- **Mileage.** Customers use the Current Mileage and Unit fields to enter the mileage of the vehicle and to specify whether the unit of measure is miles or kilometers.
- **Dealer.** Customers can click the select button of the Assigned Dealer field to select a dealer to assign to the service request. Customers are not required to make a selection in this field.
- **Services to Be Performed.** Customers can specify the services to perform as part of the service request.
- **Appointment Time.** Customers can specify the time and date for the service request.

You can set up Siebel Assignment Manager to assign service requests. The type of service request, dealer locations, the makes of vehicles that dealers handle, dealer special skills, and other criteria can determine this assignment. For more information, see *Siebel Assignment Manager Administration Guide*. For more information about service requests, see *Siebel Automotive Guide*.

Service History

To help customers keep track of the performed services for their vehicles, Siebel eService for Automotive provides the Service History view as an addition to Siebel eService.

Customers can click the My Service History link in the My Account view to display the Service History list, which includes all of their past service history. They can also click the VIN number (#) field in the My Vehicles view to display a Vehicle form and a Service History list for a specific vehicle.

In the Service History list, customers can click the SH number (#) field of any service history in the list to display a Service History form that includes information about that service history and a Services Performed list that includes all of the actions to respond to the service.

You can import service history records from the Dealer Management System (DMS) for the dealer. Alternatively, customers can add the service history themselves by clicking the New button of the Service History list in Siebel eService for Automotive. For more information about service history, see *Siebel Automotive Guide*.

Administering Siebel eService for Automotive

This topic lists the tasks that are specific to Siebel eService for Automotive. For information about administrative tasks that are consistent in Siebel Financial Services, see *Siebel eService Administration Guide*.

To administer Siebel eService for Automotive, administrators perform the following tasks:

- "Activating Vehicle Registration Workflows" on page 66
- "Sharing Preventive Maintenance Documents with Customers" on page 66

Activating Vehicle Registration Workflows

Before customers can use Siebel eService for Automotive to register their vehicles, you must activate the vehicle registration workflows.

To activate vehicle registration workflows

1. In Siebel Automotive, navigate to the Administration - Runtime Events screen, then the Events view.
2. Query for the value *eAuto*Reg* in the Object Name field.
3. If the query displays any records, then delete them all and continue with the next step. If the query does not display any records, then continue with the next step.
4. Navigate to the Administration - Business Process screen, then the Workflow Processes view.
5. Query for the value eAuto Vehicle-Reg* in the Business Object field.

   Several records appear. Active records have a value of Active in the Status field.
6. If any record is not active, then select the record, and click Activate.

   The Status field of the record changes to Active. After the status of every record is Active, customers can proceed with vehicle registration.

Sharing Preventive Maintenance Documents with Customers

You can share preventive maintenance documents with customers by adding the documents as attachments to preventive maintenance plans in Siebel Automotive. For example, you can create a document with detailed instructions for servicing an automobile, and attach the document to the appropriate preventive maintenance plan.

Then, customers who use that preventive maintenance plan can click a preventive maintenance action in the Actions list in Siebel eService for Automotive to display a form with detailed information about the action and a list of attachments. The customers can click any attachment in the list to download and display the document.

To share a preventive maintenance document with a customer

1. In Siebel Automotive, navigate to the Preventive Maintenance screen.
2. In the Plans list, select the record for the plan that the document applies to.
3. Click the Attachments view tab.
4. In the Attachments list, click New File.
5. In the Choose file dialog box, select the file that you want to add as an attachment, and click Open.

   The file is added as an attachment to the plan.

7

Siebel eService for Communications, Media, and Energy

This chapter describes Siebel eService for Communications, Media, and Energy. It includes the following topics:

- About Siebel eService for Communications, Media, and Energy on page 69
- Differences Between Siebel eService and Siebel eService for CME on page 69

About Siebel eService for Communications, Media, and Energy

Siebel eService for Communications, Media, and Energy is a Web portal that allows your customers to perform the following tasks:

- Submit and track service requests.
- Track the status of orders.
- Manage products through their life cycle.
- Search a knowledge base for solutions to frequently asked questions and for other information.
- Troubleshoot problems using interactive guides.
- Locate your nearest retail or service location.
- Collaborate with service agents in real time by sharing Web pages, documents, and other desktop information.

Differences Between Siebel eService and Siebel eService for CME

To review the differences between Siebel eService and Siebel eService for Communications, Media, and Energy, see the following information:

- "Differences in the Customer Portal for CME" on page 69
- "Differences in Personalization for CME" on page 71

Differences in the Customer Portal for CME

The customer portal for Siebel eService for Communications, Media, and Energy is different from the customer portal for Siebel eService. For information about the portal that customers use to access Siebel eService, see *Siebel eService Administration Guide*.

The most important differences include the following differences:

- Support for complex account management
- Support for complex orders that include products and services

NOTE: Service requests are also known as trouble tickets in the communications industry. The term *trouble ticket* is used in Siebel Communications for internal, agent-facing applications, but the term *service request* is used in the customer portal because people who use the product through the Web might not be familiar with this industry-specific term. In Siebel Communications, you can access the All Trouble Tickets view to see service requests submitted through the customer portal.

Support for Complex Account Management

In the communications, media, and energy industries, a single customer can frequently have multiple accounts for different types of service at different locations. For example, a customer can have accounts for electric and gas service at many locations.

Siebel Communications and Siebel Energy allow you to define complex account hierarchies. For example, you might define a parent account for a customer's business, separate child accounts for each utility service at each of the customer's sites, and several billing accounts for billing the service at different groups of sites. For more information about account hierarchies, see the information about accounts in *Siebel Communications Guide* or *Siebel Energy Guide*.

NOTE: A contact can see an account if either the Proxy Employee value specified in the .cfg file for Siebel eService, Siebel eSales, and Siebel eCustomer for Financial Services, or the login name in the Employee Login Name field in the User list of the Administration - User screen is one of the names in the Account Team field of that account record.

The My Account view allows customers to work with multiple accounts.

Customers click the current account link of the My Account view to display the Current Account view, which includes information about their current account and a Select Account list that includes all of their accounts. They can use this Current Account view to perform the following tasks:

- **Change the current account.** Customers can use the Current Account list at the bottom of the view to select the current account. Siebel eService displays service requests, billing information, and other information for the current account.
- **Select the primary account.** Customers can use the Primary Account list at the bottom of the view to select the primary account.
- **Add new accounts.** Customers can click the Create New Account button to create and enter information about a new account.
- **Add new addresses.** Customers can click the Add button of the Current Account Address list to add new addresses for the current account.

Support for Complex Orders Including Products and Services

In the communications, media, and energy industries, customers frequently place complex orders, which include products and services. For example, a customer might order a cell phone and cell phone service. The cell phone might have a warranty that expires after a year, while the cell phone service continues until the customer ends the service.

For communications, media, and energy industries, Siebel eService for Siebel Industry Solutions supports these complex bundles of products and services. The Siebel eService for Siebel Industry Solutions home page has a link named My Products and Services, instead of the Register My Product link on the Siebel eService home page. There is also a Products and Services applet in the My Account view. These features allow customers to view information about the products and services for the account for which they are currently logged in.

Differences in Personalization for CME

Personalization changes exist for customer applications because a single contact can have multiple accounts in Siebel eService Communications, Media, and Energy.

Any account-specific personalization rules are evaluated using the primary account of the contact. When the contact logs in, the login process loads the profile for contact's primary account into memory. When the contact selects an account, the process does not flush the profile of the primary account out of memory and load a new one. Table 18 shows the profile attribute values that the process changes.

Table 18. Profile Attribute Changes for Account Selection

Attribute Name	Value
SessionAccountId	ROW_ID
SessionAccountName	NAME
CustomerAccountId	MASTER_OU_ID
DefaultPriceListId	CURR_PRI_LST_ID

You cannot change this behavior, so account-driven personalization rules always use the primary account of the contact.

However, if you want to use a specific field value of the current account for personalization, then you can write Siebel VB (Visual Basic) code to get the field value from the account. When the user selects an account, the following global variables that can be accessed using Siebel VB are set:

- AccountId
- AccountName

To access these variables, use the InvokeMethod event, and use the SetProfileAttr method to set a dynamic profile attribute. For more information about personalization, see *Siebel Personalization Administration Guide*.

8 Siebel Public Sector eService

This chapter describes Public Sector eService, and provides information about how to use the Siebel Public Sector eService Web site. It includes the following topics:

- About Siebel Public Sector eService on page 73
- Differences Between Siebel eService and Siebel Public Sector eService on page 73
- Using Siebel Public Sector eService on page 74
- Registering on Siebel Public Sector eService on page 74
- Managing Applications on page 75
- Managing Cases on page 82
- Managing Incidents on page 88

About Siebel Public Sector eService

Siebel Public Sector eService is a Web portal that enables citizens to perform the following tasks:

- Determine benefits that apply to them and apply for those benefits.
- View information about their cases and update those cases with additional information.
- Request appointments and appeals for their cases.
- Report incidents to public sector agencies and view reported incidents.

Differences Between Siebel eService and Siebel Public Sector eService

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 click the New User hyperlink to 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.

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*.

Using Siebel Public Sector eService

This topic lists the tasks that citizens might perform in the Siebel Public Sector eService Web site.

To use Oracle's Siebel Public Sector eService, citizens perform the following tasks:

- "Registering on Siebel Public Sector eService" on page 74
- "Managing Applications" on page 75
- "Managing Cases" on page 82
- "Managing Incidents" on page 88

Registering on Siebel Public Sector eService

Citizens must register in the Siebel Public Sector eService Web site if they want to manage applications, manage cases, and view reported incidents. When you register, you provide personal and contact information about yourself, and you create a user ID and password for yourself.

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

To register on Siebel Public Sector eService

1. In the Siebel Public Sector eService Web site, click New User in the User Login applet on the home page.
2. In the Personal Information applet, enter the appropriate data, and click Next.
3. In the Contact Information applet, enter the appropriate data, and click Next.

4. In the Usage Terms applet, click I agree.

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

5. In the Registration Confirmation applet, click Finish.

Managing Applications

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

- "Applying for Benefits" on page 75
- "Resuming the Submission of Applications" on page 77
- "Viewing the Status of Submitted Applications" on page 79
- "Revising Rejected Applications" on page 80
- "Adding Attachments to Applications" on page 81
- "Cancelling Applications" on page 81
- "Deleting Applications" on page 82

Applying for Benefits

Citizens can apply for benefits by completing and then submitting applications in the Siebel Public Sector eService Web site.

To apply for benefits, citizens can enter information in an Oracle Policy Automation interview session that they access in the Siebel Public Sector eService Web site. This information includes data about themselves (such as their name, social security number, date of birth, contact information, and address), about their finances (such as income, financial assets, and expenses) and about their households (such as other people living with them and their finances).

Generally, the citizen who creates an application is the primary contact for that application. However, if another user creates an application for a citizen, then that user is not the primary contact for the application. Only the user who creates an application can access that application in the Siebel Public Sector eService Web site.

NOTE: The described behavior of the Oracle Policy Automation interview session in this topic applies to the preconfigured, sample rulebase for Oracle Policy Automation. If customers use a different rulebase, then this behavior does not apply. For more information about the sample rulebase, see *Siebel Public Sector Guide*.

The following guidelines apply to the user interface in the interview session:

- Siebel Public Sector assigns a case ID to an application in the interview session. The case ID identifies the Oracle Policy Automation interview session. Siebel Public Sector also assigns a case number to an application in the Siebel Public Sector application. The case ID is not the same as the case number.

- You must enter a value in fields that have a star icon.
- If you enter an invalid value in a field, then an error message appears when you attempt to continue to the next screen, and you must correct the field value before you can continue to the next screen.
- A diagram near the bottom each screen graphically depicts your progress in completing the application.
- If you close the interview session before clicking the Save link, then the data that you enter in the interview session is not saved, and you do not see a warning message about the unsaved data. If you click the Save link to save an application, but you do not submit that application to the agency, then agents can see, but not process, the application record in the Siebel Public Sector application.

To apply for benefits

1. In the Siebel Public Sector eService Web site, click the Service tab.
2. In the Quick Links applet, click the Apply For Benefits hyperlink.

   The first screen of the Oracle Policy Automation interview session appears. You can click links in the Further Information section of this screen to access information about benefit plans in a different browser session.

3. Click Apply Now, and enter information on each screen of the interview session that applies to you.
4. Perform the following actions to navigate in the interview session:
   - To temporarily save the data in the current screen and to navigate to the next screen, click Continue. (You must click Save to save the application record.)
   - To add records to a screen of the interview session, click Add.

     For example, you can add household members on the screen for people in the household.

   - To remove records from a screen of the interview session, select the Remove check box, and click Remove.

     For example, you can remove household members from the screen for people in the household.

   - To save an incomplete application or to later submit a completed application, click Save.

     The Save Successful dialog box appears showing a case ID link for the application. To access this application later, you can add the case ID link for the saved application to your bookmarks, or you can copy this link to another application, such as a Microsoft Word document. After you obtain the information that you need from this dialog box, close it. For more information, see "Resuming the Submission of Applications" on page 77.

- To review the information that you entered in the application, click Data Review.

  To change the information in the Data Review screen, click the link the precedes the information that you want to change, change the information in the screen of the interview session that appears, and then click Continue.

  To continue to enter application data in screens of the interview session that you have not yet completed, click Summary, and then click Update Application to see the first incomplete screen. After you complete all the screens for an application, the screen with the summary of the benefits for which you are eligible appears when you click Summary.

5. On the screen that indicates that your application is complete, complete the following steps:
   a. Note the application number.
   b. Select the radio button to submit the application to the agency.

      If you are not ready to submit the application, then do not change the radio button selection. You must click Save on the next screen to submit the application to the agency. After you submit an application, you cannot change the application information unless an agent rejects the application. For more information, see "Revising Rejected Applications" on page 80.
   c. (Optional) Enter any additional comments for the application.
6. On the screen with a summary of the benefits for which you are eligible, complete the following steps:
   a. To view more information about the decision hierarchy that describes why you are eligible for a benefit plan, click the Why? links in the text next to the benefit plan.

      You can click Summary to return to the screen with the summary of benefits.
   b. To view more information about a benefit plan, click the link for the benefit plan.

      This information appears in a different browser session.
   c. To print the application, click Print My Application.

      You can print the application only if you select the radio button to submit the application in Step 5.
   d. Click Save.

      The Save Successful dialog box appears showing a case ID link for the application.

Resuming the Submission of Applications

Citizens can access their saved applications to finish entering data and to submit the applications to an agency for processing. They can access these saved applications by using the case ID link or the My Applications view.

Using the Case ID Link

When citizens save an application, the Save Successful dialog box appears showing a case ID link for the application. They can add the case ID link for the saved application to their bookmarks, or they can copy this link to another application, such as a Microsoft Word document. Later, they can access this case ID link to resume application submission.

Although you can access the case ID link to change data in an application that you already submitted to an agency, your changes have no effect because you cannot resubmit that application to the agency. For information about revising and resubmitting a rejected application, see "Revising Rejected Applications" on page 80.

NOTE: When citizens use the case ID link to resume submission of an application, they do not enter login credentials to access a Siebel Public Sector eService Web site. Consequently, for security reasons, customer deployments can exclude the case ID link in the Save Successful dialog box.

To resume the submission of an application by using the case ID link

1. Access the case ID link by using one of the following methods:
   - Select the bookmark for the case ID link in your bookmarks.
   - Copy the case ID link in an application, such as a Microsoft Word document, to the URL field for your browser.

     The first incomplete screen of the interview session appears.
2. Enter information on the appropriate screens of the interview session.

   For more information about completing the saved application, see "Applying for Benefits" on page 75.

Using the My Applications View

Citizens can access the My Applications view to see applications with a Status field value of Saved. They can open these saved applications to resume application submission.

To resume the submission of an application by using My Applications view

1. In the Siebel Public Sector eService Web site, click the My Applications tab.
2. (Optional) To find a specific application, click Query, enter the search criteria in the fields in the My Applications form, and click Go.

   NOTE: For the form fields in which you can type text, you can use a wildcard to search, which in this case is an asterisk (*). For example, you can type **89** in the Application number (#) field to find all applications that contain the number *89* within the application number.
3. Select the saved application for which you want to resume submission.
4. Click Open.

   The interview session for Oracle Policy Automation opens.

5. Click Update Application.

   The first incomplete screen of the interview session appears.

6. Enter information on the appropriate screens of the interview session.

   For more information about completing the saved application, see "Applying for Benefits" on page 75.

Viewing the Status of Submitted Applications

An agent can accept or reject a submitted application in the Siebel Public Sector application. To accept the submitted application for further processing, the agent finds matching contact records for the application, and then uploads the application into the Siebel Public Sector application. After upload, the Status field for the application record changes from Submitted to Processed.

Also after upload, a case record for the application is automatically created in the Siebel Public Sector application. The citizen who is the primary contact for the application can view this case record in the Siebel Public Sector eService Web site. For more information, see "Viewing Cases" on page 83.

To reject the submitted application because it contains incomplete or incorrect data, the agent changes the Status field for the application record from Submitted to Rejected. Also, the agent selects a value in the Reason Rejected field for the application record, and might enter additional comments about the rejection in the Comments field for the application record. For more information about accepting or rejecting submitted applications, see *Siebel Public Sector Guide*.

To view the status of a submitted application

1. In the Siebel Public Sector eService Web site, click the My Applications tab.
2. (Optional) To find a specific application, click Query, enter the search criteria in the fields in the My Applications form, and click Go.

   NOTE: For the form fields in which you can type text, you can use a wildcard to search, which in this case is an asterisk (*). For example, you can type **89** in the Application number (#) field to find all applications that contain the number *89* within the application number.

3. In the My Applications applet, complete the following steps:
   a. Note the value in the Status field of the application.
      - ❑ If the value is Processed, then an agent accepted the application for further processing.
      - ❑ If the value is Rejected, then an agent rejected the application because it contains incomplete or incorrect data.
      - ❑ If the value is Submitted, then an agent has not yet accepted or rejected the application.

   b. If the Status field value is Rejected, then note the value in the Reason Rejected field, and note any additional information about rejecting the application that the agent entered in the Comments field.

Revising Rejected Applications

To revise rejected applications, citizens can access applications with a Status field value of Rejected if the Reason for Rejection field value is Incomplete Information. After they revise and save a rejected application, the application is automatically resubmitted to the agency.

To revise a rejected application

1. In the Siebel Public Sector eService Web site, click the My Applications tab.

   The following table describes some of the fields.

Field	Description
Status	Displays the status of the application.
Reason Rejected	Displays the agent’s reason for rejecting the application for further processing.
Comments	Displays comments that the agent entered about rejecting the application.

2. (Optional) To find a specific application, click Query, enter the search criteria in the fields in the My Applications form, and click Go.

   NOTE: For the form fields in which you can type text, you can use a wildcard to search, which in this case is an asterisk (*). For example, you can type **89** in the Application number (#) field to find all applications that contain the number *89* within the application number.

3. Select the application that you want to revise.
4. Click Open.

   The interview session for Oracle Policy Automation opens.

5. To review the information that you entered in the application, click Data Review.

   To change the information in the Data Review screen, click the link the precedes the information that you want to change, change the information in the screen of the interview session that appears, and then click Continue.

   For more information about completing the rejected application, see “Applying for Benefits” on page 75.

6. Click Save.

   The Save Successful dialog box appears showing a case ID link for the application. The Status field value for the application changes to Submitted, and the application is automatically resubmitted to the agency.

Adding Attachments to Applications

To support the information that citizens include in applications, they can add attachments to the applications. The attachments that citizens add also appear in the Application Attachments view of the Applications screen in the Siebel Public Sector application.

In the Siebel Public Sector application, an agent can add attachment records to an application. If a citizen has access to the application in the Siebel Public Sector eService Web site, then the citizen can view the attachment records.

In the My Applications view, citizens can add attachments to applications with a Status field value of Saved, Submitted, or Rejected. You cannot add attachments to applications with a Status field value of Cancelled or Processed. If you want to add an attachment after an application is processed, then add the attachment to the appropriate case record. For more information, see "Updating Cases" on page 83.

To add an attachment to an application

1. In the Siebel Public Sector eService Web site, click the My Applications tab.
2. (Optional) To find a specific application, click Query, enter the search criteria in the fields in the My Applications form, and click Go.

   NOTE: For the form fields in which you can type text, you can use a wildcard to search, which in this case is an asterisk (*). For example, you can type **89** in the Application number (#) field to find all applications that contain the number *89* within the application number.

3. To add an attachment to the application, complete the following steps:
   a. Click the hyperlink in the Application number (#) field for the application.
   b. In the Application Attachments applet, click Add.
   c. In the Attachments form, click the select button for the Attachment Name field.
   d. In the Add Attachment dialog box, select a file or enter a URL, and then click Add.
   e. (Optional) Enter a description of the attachment in the Comments field.
   f. Click Save.

      In the Application Attachments applet, the new attachment record appears. You cannot change or delete this attachment.

Cancelling Applications

Citizens might decide to not apply for benefits after starting an application, or they might want to discard an existing application, and create a new application. In the My Applications view, citizens can cancel applications with a Status field value of Saved, Submitted, or Rejected. When they cancel an application, the Status field value changes to Cancelled.

To cancel an application

1. In the Siebel Public Sector eService Web site, click the My Applications tab.
2. (Optional) To find a specific application, click Query, enter the search criteria in the fields in the My Applications form, and click Go.

   NOTE: For the form fields in which you can type text, you can use a wildcard to search, which in this case is an asterisk (*). For example, you can type **89** in the Application number (#) field to find all applications that contain the number *89* within the application number.

3. Select the application that you want to cancel.
4. Click Cancel Application.

   The Status field value for the application record changes to Cancelled.

Deleting Applications

To clear unneeded records from the My Applications screen, citizens can delete application records with a Status field value of Saved, Rejected, or Cancelled. Although agents can view applications with any Status field value in the Siebel Public Sector application, they cannot view applications after citizens delete them.

To delete an application

1. In the Siebel Public Sector eService Web site, click the My Applications tab.
2. (Optional) To find a specific application, click Query, enter the search criteria in the fields in the My Applications form, and click Go.

   NOTE: For the form fields in which you can type text, you can use a wildcard to search, which in this case is an asterisk (*). For example, you can type **89** in the Application number (#) field to find all applications that contain the number *89* within the application number.

3. Select the application that you want to delete.
4. Click Delete.

Managing Cases

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

- "Viewing Cases" on page 83
- "Updating Cases" on page 83
- "Requesting Appointments for Cases" on page 84
- "Viewing the Status of Appointment Requests" on page 85
- "Requesting Appeals for Cases" on page 86

- “Viewing the Status of Appeal Requests” on page 87

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. In the Siebel Public Sector eService Web site, click the Service tab.
2. In the Quick Links applet, click the Check Case Status hyperlink.
3. In the My Cases applet, click the hyperlink in the Case number (#) field for the case that you want to view.

   Details about the case appear in an applet 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. In the Siebel Public Sector eService Web site, click the Service tab.
2. In the Quick Links applet, click the Check Case Status hyperlink.
3. (Optional) To find a specific case, click Query, enter the search criteria in the fields in the My Cases form, and click Go.

   NOTE: For the form fields in which you can type text, you can use a wildcard to search, which in this case is an asterisk (*). For example, you can type **Arson** in the Name field to find all cases that contain the word *Arson* in the case name. The search logic is case sensitive, so the word *Arson* might yield different search results than the word *arson*.

4. In the My Cases applet, click the hyperlink in the Case number (#) field for the case that you want to update.
5. If you want to add an attachment to the case, then complete the following steps:
   - a In the Attachments applet, click Add.
   - b In the Attachments form, click the select button for the Attachment Name field.
   - c In the Add Attachment dialog box, select a file or enter a URL, and then click Add.
   - d (Optional) Enter a description of the attachment in the Comments field.
   - e Click Submit.

     In the Attachments applet for the case, the new attachment record appears. You cannot change or delete this attachment.

6. If you want to add information about an activity that is associated with the case, then complete the following steps:
   - a In the Activities applet, click Add.

     To create an activity that is an appointment request, see "Requesting Appointments for Cases" on page 84.

   - b In the Activities form, complete the appropriate fields, and select Web Update in the Type field.
   - c Click Submit.

     In the Activities applet for the case, a new activity record appears. You cannot change or delete this activity, but an agent can change (but not delete) this activity in the Siebel Public Sector application.

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. In the Siebel Public Sector eService Web site, click the Service tab.

2. In the Quick Links applet, click the Check Case Status hyperlink.
3. (Optional) To find a specific case, click Query, enter the search criteria in the fields in the My Cases form, and click Go.

   NOTE: For the form fields in which you can type text, you can use a wildcard to search, which in this case is an asterisk (*). For example, you can type **Arson** in the Name field to find all cases that contain the word *Arson* in the case name. The search logic is case sensitive, so the word *Arson* might yield different search results than the word *arson*.

4. In the My Cases applet, click the hyperlink in the Case number (#) field for the case for which you want to request an appointment.
5. In the Activities applet, complete the following steps:
   a. Click Add.
   b. In the Activities form, complete the appropriate fields, and select Appointment in the Type field.
   c. Click Submit.

      In the Activities applet for the case, an activity record for the appointment appears. 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.

6. 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 an attachment to a case, see Step 5 in "Updating Cases" on page 83.

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. In the Siebel Public Sector eService Web site, click the Service tab.
2. In the Quick Links applet, click the Check Case Status hyperlink.
3. (Optional) To find a specific case, click Query, enter the search criteria in the fields in the My Cases form, and click Go.

   NOTE: For the form fields in which you can type text, you can use a wildcard to search, which in this case is an asterisk (*). For example, you can type **Arson** in the Name field to find all cases that contain the word *Arson* in the case name. The search logic is case sensitive, so the word *Arson* might yield different search results than the word *arson*.

4. In the My Cases applet, click the hyperlink in the Case number (#) field of the case for which you want to view more information about an appointment request.
5. 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. In the Siebel Public Sector eService Web site, click the Service tab.
2. In the Quick Links applet, click the Check Case Status hyperlink.
3. (Optional) To find a specific case, click Query, enter the search criteria in the fields in the My Cases form, and click Go.

   NOTE: For the form fields in which you can type text, you can use a wildcard to search, which in this case is an asterisk (*). For example, you can type **Arson** in the Name field to find all cases that contain the word *Arson* in the case name. The search logic is case sensitive, so the word *Arson* might yield different search results than the word *arson*.

4 In the My Cases applet, select the case for which you want to request an appeal, and click Appeal Request.

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

5 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.

6 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 an attachment to a case, see Step 5 in "Updating Cases" on page 83.

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:

- The Appealed field for the original case is checked to indicate the original case is appealed.
- A new appeal case appears in the My Cases applet.
- 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 In the Siebel Public Sector eService Web site, click the Service tab.

2 In the Quick Links applet, click the Check Case Status hyperlink.

3 (Optional) To find a specific case, click Query, enter the search criteria in the fields in the My Cases form, and click Go.

   NOTE: For the form fields in which you can type text, you can use a wildcard to search, which in this case is an asterisk (*). For example, you can type **Arson** in the Name field to find all cases that contain the word *Arson* in the case name. The search logic is case sensitive, so the word *Arson* might yield different search results than the word *arson*.

4 In the My Cases applet, note the designation in the check box for the Appealed field for the case for which you requested an appeal.

   - If the check box is checked, then an agent accepted the appeal request, and created a new appeal case that you can access.

     The Name field for this appeal case is the name of the original case followed by Appeal text and a date. This new appeal case contains information about the appeal of the original case.

   - If the check box is not checked, then an agent either rejected the appeal request or has not yet accepted or rejected the appeal request.

5 In the My Cases applet, click the hyperlink in the Case number (#) field of the case for which you want to view more information about an appeal request.

6 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.

Managing Incidents

To manage incidents, citizens perform the following tasks:

- "Reporting Incidents" on page 88
- "Viewing Reported Incidents" on page 89

Reporting Incidents

Both registered citizens who enter a user ID and password to access the Siebel Public Sector eService Web site and anonymous citizens can report incidents to public sector agencies. An incident represents the information about an event that might be of interest to an agency.

To report an incident

1 In the Siebel Public Sector eService Web site, click the Service tab.

2. In the Quick Links applet, click the Report Incident hyperlink.
3. In the Incident Report form, complete the fields.
4. Click Submit.

Viewing Reported Incidents

Only registered citizens, who enter a user ID and password to access the Siebel Public Sector eService Web site, can view a list of their reported incidents.

To view reported incidents

1. In the Siebel Public Sector eService Web site, click the Service tab.
2. In the Quick Links applet, click the Check Incident Status hyperlink.
3. (Optional) To find a specific incident, click Query, enter the search criteria in the fields in the Check Incident Status form, and click Go.

   NOTE: For the form fields in which you can type text, you can use a wildcard to search, which in this case is an asterisk (*). For example, you can type **Arson* in the Incident Summary field to find all incidents that contain the word *Arson* in the incident summary. The search logic is case sensitive, so the word *Arson* might yield different search results than the word *arson*.

Index

A

Account Detail view, about navigation control to 15

account downloads
- about and configuration process for 25
- about creating data map for 31
- adding a new value to File Format drop-down list for 30
- creating integration object for new file type for 31
- modifying workflow for 31

Account Nickname field, displaying name in 25

account transaction information
- about downloading 16
- activating workflow for 29

AccountId, accessing 71

AccountName, accessing 71

Accounts page
- about 14
- about Credit and Loans applet in summary view in 16
- about Deposits and Investments applet in summary view in 15
- about download in account detail views in 16
- about Select Account applet in account detail views in 16
- calculation of total asset and liability balance fields in 15

Alternative Medicine Search hyperlink, about 44

appeal requests, viewing status of 87

appeals, requesting for cases 86

applications
- adding attachments to 81
- cancelling 81
- deleting 82
- managing 75
- resuming the submission of 77
- revising rejected 80
- viewing status of submitted 79

appointment requests, viewing status of 85

appointments, requesting for cases 84

attachments, adding to applications 81

Automotive
- about and functionality for 59
- about Dealer Locator in 61
- about My Account view in and differences from eService 62
- about setting up preventive maintenance for 63
- about using My Vehicles view to display all vehicles in 63
- activating vehicle registration workflows in 66
- administering 66
- displaying auto policy coverage comparisons in 46
- entering service requests in 64
- global buttons for 60
- home page differences from eService 60
- important differences from eService 60
- inventory search for vehicles in 61
- making home page visible for 61
- registering vehicles in 64
- sharing preventive maintenance documents with customers in 66
- viewing service history in 65
- visibility of preventive maintenance actions to customer in 64

B

beneficiary, designating 56

benefits, applying for 75

Bill Pay page
- about 17
- actions for electronic bill payment in 17
- authorizing and enrolling customer accounts in 31
- determining whether customer is enrolled in 32
- reviewing payees and payments for contacts in 33
- unenrolling customers in 32

C

cases
- managing 82
- requesting appeals for 86
- requesting appointments for 84
- updating 83
- viewing 83

Claim Payments hyperlink, about using to

- **report claims** 40
- **claims, about** 40
- **classes, setting up** 43
- **Communications, Media, and Energy (CME)**
  - about and functionality for 69
  - contact visibility for an account in 70
  - customer portal differences from eService 69
  - differences from eService 69
  - personalization differences from eService 71
  - support for complex account hierarchies in 70
  - support for complex orders in 70
  - using My Account view to work with multiple accounts in 70
- **contacts, reviewing payees and payments for** 33
- **contract providers**
  - *See* providers
- **Credit and Loans applet in summary view, about** 16
- **customer accounts**
  - authorizing and enrolling customers in 31
  - unenrolling customers in 32
- **customer portal, differences between Communications, Media, and Energy (CME) and eService** 69
- **Customer Service page**
  - about and types of service requests in 18
  - mapping between eBanking and Finance 18
- **customers**
  - determining whether enrolled 32
  - entering service requests for 64
  - sharing preventive maintenance documents with 66
  - viewing service history for 65
  - visibility of preventive maintenance actions to 64

D

- **data map, about creating** 31
- **Dealer Locator, about** 61
- **Dealer Management System (DMS)** 65
- **Deposits and Investments applet in summary view, about** 15
- **doctors**
  - *See* providers
- **documents, sharing with customers** 66
- **download**
  - about in account detail views 16
  - activating workflow for 29
- **drug interaction information, setting up link to** 45

E

- **eBanking**
  - about Accounts page in 14
  - about and features of 9
  - about Bill Pay page in 17
  - about Credit and Loans applet in summary view in 16
  - about Customer Service page in 18
  - about Deposits and Investments applet in summary view in 15
  - about download in account detail views in 16
  - about home page and views in 13
  - about Login page in 13
  - about making user interface consistent for 27
  - about Select Account applet in account detail views in 16
  - about setting display sequence for financial accounts in home page of 28
  - about Transfers page in 16
  - about using Siebel Personalization for 28
  - adding account download file types for 30
  - administering 27
  - assigning separate sequence intervals to group financial accounts in 29
  - calculation for total asset and liability balance fields in 15
  - configuring service requests in 28
  - differences from eService 12
  - features in user interface for 12
  - managing 31
  - managing personal profiles in 24
  - mapping to Finance for Customer Service page 18
  - purposes of 11
  - setting default sequence of financial accounts in 29
  - using 33
- **eBrokerage**
  - about and functionality for 10
  - about home page and views in 13
  - about Login page in 13
  - about making user interface consistent for 27
  - about Relationship page in 19
  - about setting display sequence for financial accounts in home page of 28
  - about Trades page in 19
  - about using Siebel Personalization for 28
  - adding investment holdings in 35
  - adding investment interests in 35
  - administering 27
  - assigning separate sequence intervals to

group financial accounts in 29
channels for call center help in 10
configuring service requests in 28
editing investment holdings in 35
editing investment interests in 36
features in 11
features in user interface for 12
managing 31
mapping to Finance for Relationship page 19
purposes of 11
setting default sequence of financial accounts in 29
using 33

eCustomer
about 57
about home page for 58
features in user interface for 57

eEnrollment
about and functionality for 51
about displaying providers in 56
adding family members to list of enrollable members in 55
administering 53
designating beneficiary in 56
enrolling family members for coverage in 55
features in user interface for 51
form requirements for Literature page in 52
searching for providers in 56
setting up provider search for 53
using 54

eEvents page, about 39

electronic bill payment
about 17
actions for 17
authorizing and enrolling customer accounts for 31
determining whether customer is enrolled for 32
reviewing payees and payments for contacts for 33
unenrolling customers for 32

energy
See Communications, Media, and Energy (CME)

eService
differences from Communications, Media, and Energy (CME) 69
differences from eBanking 12
differences from Public Sector 73
important differences from Automotive 60

external funds transfers
See transfers

F

family members
adding to list of enrollable members 55
enrolling for coverage 55

File Format drop-down list, adding a new value to 30

Finance
mapping to eBanking for Customer Service page 18
mapping to eBrokerage in Relationship page 19

financial accounts
about and example 14
about setting display sequence of 28
assigning separate sequence intervals to group 29
setting default sequence of 29

Find Provider form applet, fields in 53

FINS eBanking Home Page View, about 13

FINS eBrokerage Bond Trade Form applet, user properties for 23

FINS eBrokerage Home Page View, about 13

FINS eBrokerage Mutual Fund Purchase Form applet, user properties for 23

FINS eBrokerage Mutual Fund Sale Form applet, user properties for 22

FINS eBrokerage Stock Trade Form applet, user properties for 21

FINS eBrokerage Transfer Securities In applet, user properties for 24

formulary search, setting up 45

funds
about checks for transferring 17
transferring into or out of an account 34

G

global buttons, for Automotive 60

group benefits
about 39
viewing information for 48

group policies, about 39

H

health insurance
about displaying providers for 56
adding family members to 55
administering partner and claim center locators for 46
changing primary care providers for (HMO only) 48
designating beneficiary for 56
displaying auto policy coverage comparisons

for 46
enrolling family members for coverage in 55
searching for providers for 56
setting up alternative medicine search for 44
setting up classes and seminars for 43
setting up formulary search for 45
setting up healthcare discounts for 43
setting up link to drug interactions information for 45
setting up pharmacy locator for 44
setting up printable online documents for 46
setting up provider search for in eEnrollment 53
setting up provider search for in Siebel Insurance eService 42
setting up service provider search for 46
viewing group benefit information for 48
viewing information about providers for 48
viewing personal policy information for 47

Healthcare Member responsibility, about 41

holdings
See investment holdings

home page
about and views for in eBanking 13
about and views for in eBrokerage 13
about for eCustomer 58
about setting display sequence for financial accounts in 28
Automotive differences from eService 60
creating responsibilities-based 41
for eEnrollment 52
for Siebel Insurance eService 38
making visible for Automotive 61

I

incidents
managing 88
reporting 88
viewing reported 89

insurance
administering partner and claim center locators for 46
changing primary care providers for (HMO only) 48
displaying auto policy coverage comparisons for 46
setting up alternative medicine search for 44
setting up classes and seminars for 43
setting up formulary search for 45
setting up healthcare discounts for 43
setting up link to drug interactions information for 45
setting up pharmacy locator for 44
setting up printable online documents for 46
setting up provider search for 42
setting up service provider search for 46
viewing group benefit information for 48
viewing information about providers for 48
viewing personal policy information for 47

Insurance Member responsibility, about 41

Interests applet
adding investment interests in 35
editing investment interests in 36

inventory search, for vehicles 61

investment holdings
adding 35
difference from making trades 34
editing 35

investment interests
adding 35
editing 36

InvokeMethod event, using to access global variables 71

L

Literature page
form requirements for in eEnrollment 52
form requirements for in Siebel Insurance eService 38

Login page, about for eBanking and eBrokerage 13

M

media
See Communications, Media, and Energy (CME)

My Account view
about and differences from eService 62
using to work with multiple accounts 70

My Products and Service link, about using to place complex orders 70

My Profile page, about using and mapping eBanking to Finance for 24

My Service link, using to view service history 65

My Service Requests link, using to view service requests 64

My Vehicles view, about using to display all vehicles 63

N

names and nicknames, in personal profiles 25

O

online banking
  See eBanking
online documents, setting up printable 46
Original Equipment Manufacturer (OEM) 59

P

partner and claim center locators, administering 46
personal policies
  about 39
  viewing information in 47
personal profiles, about using My Profile page for 24
Personalization (Siebel Personalization), about using for eBanking and eBrokerage 28
pharmacy
  setting up formulary search 45
  setting up link to drug interactions information 45
  setting up pharmacy locator 44
preventive maintenance
  about setting up for vehicles 63
  sharing documents with customers 66
  visibility of actions to customer 64
primary care providers (PCPs)
  See providers
product attributes, displaying to eEnrollment users 53
provider search
  setting up for eEnrollment 53
  setting up for Siebel Insurance eService 42
providers
  about displaying 56
  changing (HMO only) 48
  searching for 56
  viewing information about 48
Public Sector
  about and functionality 73
  differences from eService 73
  registering on 74
  using 74

R

Relationship page, about and mapping between eBrokerage and Finance in 19
responsibilities
  about creating 41
  about preconfigured 41
  setting up in Siebel Insurance eService 41

S

Salutation applet, about 38
Select Account applet in account detail views, about 16
seminars, setting up 43
service history, viewing 65
service provider search, setting up 46
service requests
  about submitting in Siebel Insurance eService 39
  configuring for eBanking and eBrokerage 28
  entering in Automotive 64
Siebel eBanking
  See eBanking
Siebel eBrokerage
  See eBrokerage
Siebel eCustomer for Financial Services
  See eCustomer
Siebel eEnrollment for Financial Services
  See eEnrollment
Siebel eService for Automotive
  See Automotive
Siebel eService for Communications, Media, and Energy
  See Communications, Media, and Energy (CME)
Siebel Insurance eService
  about and functionality for 37
  about claims in 40
  about Contact Us hyperlink in 40
  about creating responsibilities for 41
  about eEvents page in 39
  about group benefits in 39
  about Help hyperlink in 40
  about home page for 38
  about Log In/Out hyperlink in 40
  about My Profile hyperlink in 40
  about personal policies in 39
  about submitting service requests in 39
  administering 41
  administering partner and claim center locators in 46
  changing primary care providers in (HMO only) 48
  displaying auto policy coverage comparisons in 46
  features in user interface for 38
  form requirements for Literature page in 38
  preconfigured responsibilities for 41
  setting up alternative medicine search in 44
  setting up classes and seminars in 43
  setting up formulary search in 45
  setting up healthcare discounts in 43

- setting up link to drug interactions information in 45
- setting up pharmacy locator in 44
- setting up printable online documents for 46
- setting up provider search in 42
- setting up responsibilities in 41
- setting up service provider search in 46
- using 47
- viewing group benefit information in 48
- viewing information about providers in 48
- viewing personal policy information in 47

Siebel Personalization, about using for eBanking and eBrokerage 28

Siebel Public Sector eService
- *See* Public Sector

Sub Status field, for triggering availability of enrollment 55

T

Trades page
- about 19
- about cancelling trades in and changing cancellation behavior in 20
- about trade error checking in 20
- user properties for applets in 20

Transfer Money In and Transfer Money Out applet, about 34

Transfers page
- about 16
- about checks for transferring funds in 17
- transferring funds into or out of an account in 34

trouble tickets
- *See* service requests

V

Vehicle Identification Number (VIN) 64

vehicles
- about setting up preventive maintenance for 63
- about using My Vehicles view to display all 63
- activating registration workflows for 66
- entering service requests for 64
- inventory search for 61
- registering 64
- sharing preventive maintenance documents with customers for 66
- viewing service history for 65

View Claims hyperlink, about using to view claims 40