



Siebel eService Administration Guide for Siebel Open UI

Siebel Innovation Pack 2015, Rev. B
August 2016

ORACLE®

Copyright © 2005, 2016 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 about 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: About Siebel eService

- Tasks for Customers on the Siebel eService Web Site 15
- Tasks for Customer Service Representatives in Siebel eService 16
- Features of Siebel eService 16
- Requirements for Installing Siebel eService 17
- About Deploying Siebel eService 18

Chapter 3: Setting Up Siebel eService

- About Setting Up Siebel eService 19
- Roadmap for Setting Up Siebel eService 20
- About the Application Object Manager Components for Siebel eService 21
- Process of Adding the Application Object Manager Components for Siebel eService 21
 - Editing the new_comp_sia.dat File 21
 - Running the new_compdef_sia Script 24
- Process of Adding the Virtual Directories for Siebel eService 25
 - Editing the new_virdirs Script 25
 - Running the new_virdirs Script 26

Chapter 4: Configuring Siebel eService

- About Configuring Siebel eService 29
- About Configuring Oracle Knowledge for Siebel eService 30
- Configuring Siebel eService 30
- Configuration Tools for the Siebel eService Web Site 31
- Integrating Oracle Policy Automation With Siebel Public Sector eService 32
 - Prerequisites for Integrating Oracle Policy Automation 33
 - Securing Web Service Communications with Oracle Policy Automation 37
 - Showing Details of Oracle Policy Automation in Siebel Public Sector eService 38

- Control Types for Integrating Oracle Policy Automation 39
- Custom Properties for Control Types 39
- Custom Properties for Screens 41
- Custom Properties for Entities 42
- Manifest Files for View and Applet of OPA Interview Service 43
- Parameters for Configuring Interview Sessions 44
- Setting Up the Applet for Twitter 46
 - Obtaining a Twitter Widget 46
 - Displaying the Twitter Widget in Siebel eService 48
 - Designating the Height and Width of the Twitter Timeline 49

Chapter 5: Administering Siebel eService

- About Administering Siebel eService 51
- About the Security Framework for Siebel eService 51
 - About Authentication for Siebel eService 52
 - Access Control for Siebel eService 53
 - About Data Privacy for Siebel eService 53
- About Email Notifications 54
- Administering Navigation Links 54
 - Constructing Expressions 57
- Process of Administering Web Access 58
 - Activating the Workflow for Email Password Button 59
 - Registering Customers 59
 - Reassigning Passwords 60
- Configuring the Applets for Program Information 61
- Process of Setting Up Office Locations 62
 - Importing Geocode Data 62
 - Creating Divisions for Office Locations 63
 - Creating Categories for Office Locations 64
 - Creating Office Locations 64
 - Linking Search Results to Map Services 65
- Setting Up Information for Email 66
- Process of Administering Service Requests 67
 - Adding Updates to Service Requests 67
 - Creating Solutions 68
 - Associating Solutions with Service Requests 69
 - Associating Attachments with Service Requests 69
- Process of Setting Up Email Notifications 70

- Enabling Component Groups and Policies for Email Notifications 70
- Designating Customers for Email Notifications 71
- Changing Parameters for Generate Triggers Component 71
- Starting the Task for Generate Triggers Component 72
- Changing Parameters for Workflow Monitor Agent Component 72
- Starting the Task for Workflow Monitor Agent Component 73

Chapter 6: Using Siebel eService

- Managing User Profiles on the Siebel eService Web Site 75
 - Registering on the Siebel eService Web Site 75
 - Updating User Profiles 76
- Accessing the Siebel eService Web Site 76
 - Logging In to the Siebel eService Web Site 77
 - Obtaining a New Password 77
- Obtaining Program Information on the Siebel eService Web Site 78
 - Searching the Knowledge Database for Program Information 78
 - Reviewing Program Information 79
 - Reviewing News Articles 79
- Contacting the Web Site Host 80
 - Finding Office Locations of the Web Site Host 80
 - Sending Email to the Web Site Host 81
- Accessing Twitter on the Siebel eService Web Site 82
- Managing Service Requests on the Siebel eService Web Site 82
 - Submitting Service Requests 83
 - Adding Attachments to Service Requests 83
 - Adding Updates to Service Requests 84
 - Viewing Solutions for Service Requests 85

Chapter 7: Using Siebel Public Sector eService

- About Siebel Public Sector eService 87
 - About National Identification Numbers 88
 - About Contacts in Siebel Public Sector 88
- Determining Benefits Eligibility on Siebel Public Sector eService 88
- Managing Applications on Siebel Public Sector eService 89
 - Applying for Benefits 89
 - Resuming the Submission of Applications 91
 - Viewing the Status of Submitted Applications 92
 - Revising Rejected Applications 93
 - Adding Attachments to Applications 94

- Cancelling Applications 95
- Deleting Applications 95
- Managing Cases on Siebel Public Sector eService 96
 - Viewing Cases 96
 - Updating Cases 97
 - Requesting Appointments for Cases 99
 - Viewing the Status of Appointment Requests 100
 - Requesting Appeals for Cases 101
 - Viewing the Status of Appeal Requests 101

Appendix A: Workflows for Siebel eService

- Workflows for Registration 103
 - User Registration Initial Process Workflow 103
 - User Registration Process OUI Workflow 105
 - PUB Citizen User Registration Process Workflow 107
 - User Registration SubProcess OUI Workflow 107
 - User Registration Forgot Password (CX eService) Workflow 109
 - PUB Citizen User Registration Forgot Password Process Workflow 110
- Workflows for Interview Sessions 110
 - OPA Integration Workflow 111
 - OPA Integration Sub Workflow 112
 - OPA Interview Service Main Workflow 113
 - OPA Get PreSeed Data Workflow 117
 - OPA Interview Service Sub Workflow 119
 - OPA Process Submit Data Workflow 123
 - OPA End Interview Workflow 123
 - OPA Get Meta Data Service For PUB Sample Intake Contact Workflow 124
 - OPA Metadata Service - CheckAlive Workflow 125
- Workflows for Cases 126
 - PUB Citizen Create Case Activity Workflow 126
 - PUB Citizen Case Re-open Workflow 126

Appendix B: Business Services for Oracle Policy Automation

- OPA Interview Framework Service 129
 - AddPropertiesToPropertySet Method 130
 - AddSoapHdrFilter Method 130
 - CacheSessionId Method 130
 - ChangePropertysetType Method 131
 - Clearflags Method 131
 - ConvertSiebelIntObjToStartInterviewReqIntObj Method 131

ErrorHandling Method	131
Get Action Method	131
GetAdminMappingInfo Method	131
GetAdminMappingInfoAndCache Method	132
GetCachedIO Method	132
GetPropertySet Method	132
HasRequestSent Method	132
InvokeWorkflow Method	132
PopulateOutPutProperties Method	133
Prepare Request Method	133
PrepareRequestAfterSubmit Method	133
PrepareRequestGetInputData Method	133
PrepareRequestGetSeedData Method	133
PrepareRequestInvestigateWithPrevScreen Method	134
PrepareRequestStartInterview Method	134
ProcessResponse Method	134
SetErrors Method	134
SetSearchSpecToSiebelMsg Method	134
ShowErrors Method	134
PUB OPA Utilities Service	135
UpsertRecord Method	135
Metadata Filter Service	135
Request Filter Method	136
Response Filter Method	136

Index

1

What's New in This Release

What's New in Siebel eService Administration Guide for Siebel Open UI, Siebel Innovation Pack 2015, Rev. B

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

Table 1. New Product Features in Siebel eService Administration Guide for Siebel Open UI, Siebel Innovation Pack 2015, Rev. B

Topic	Description
"Setting the Application Level User Property" on page 34	New topic. It includes information on adding the ClientBusinessService business service to the Application object.
"Configuring the Inbound Web Service for OPA Metadata Web Service" on page 35	New topic. It includes information about configuring the inbound Web service for Oracle Policy Automation (OPA) Metadata Web service.
"Exposing the Siebel Metadata to OPA" on page 35	New topic. It includes information about exposing Siebel OPA integration objects (other than contacts) to OPA for metadata mapping.
"Setting Up the OPA Hub Connection" on page 36	New topic. It includes information about setting up an OPA connection.

What's New in Siebel eService Administration Guide for Siebel Open UI, Siebel Innovation Pack 2015, Rev. A

Table 2 lists the changes in this revision of the documentation to support Siebel Innovation Pack 2015, Patchset 5. The new features listed in this table are available only if you install and deploy Innovation Pack 2015, Patchset 5 or later. For more information, see *Siebel Patchset Installation Guides for Siebel Innovation Packs* (Doc ID 1614310.1) on My Oracle Support.

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

Table 2. New Product Features in Siebel eService Administration Guide for Siebel Open UI, Siebel Innovation Pack 2015, Rev. A

Topic	Description
"Prerequisites for Integrating Oracle Policy Automation" on page 33	Modified topic. It includes information about the sample database for applying for benefits, about additional workflows to activate, about an additional business service that calls the InvokeWorkflow method, and about an additional option to configure the Close button.
"Showing Details of Oracle Policy Automation in Siebel Public Sector eService" on page 38	New topic. It includes information about showing details of Oracle Policy Automation in Siebel Public Sector eService.
"Custom Properties for Entities" on page 42	New topic. It includes information about the custom properties for entities.
"Manifest Files for View and Applet of OPA Interview Service" on page 43	New topic. It includes information about the manifest files for the OPA Interview Service View and the OPA Interview Service List Applet.
"Parameters for Configuring Interview Sessions" on page 44	New topic. It includes information about the parameters for configuring interview sessions.
"Determining Benefits Eligibility on Siebel Public Sector eService" on page 88	Modified topic. It includes information about the current user interface for determining benefits eligibility.
"Managing Applications on Siebel Public Sector eService" on page 89	New topic. It includes information about how to manage applications on a Siebel eService Web site.

Table 2. New Product Features in Siebel eService Administration Guide for Siebel Open UI, Siebel Innovation Pack 2015, Rev. A

Topic	Description
"Workflows for Interview Sessions" on page 110	<p>Modified topic. It includes information about the following workflows:</p> <ul style="list-style-type: none"> ■ OPA Interview Service Main Workflow ■ OPA Get PreSeed Data Workflow ■ OPA Interview Service Sub Workflow ■ OPA Process Submit Data Workflow ■ OPA End Interview Workflow ■ OPA Get Meta Data Service For PUB Sample Intake Contact Workflow ■ OPA Metadata Service - CheckAlive Workflow
Appendix B, "Business Services for Oracle Policy Automation"	New appendix. It includes information about the business services for Oracle Policy Automation.

What's New in Siebel eService Administration Guide for Siebel Open UI, Siebel Innovation Pack 2015

Table 3 lists the changes in this revision of the documentation to support this release of the software.

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

Table 3. New Product Features in Siebel eService Administration Guide for Siebel Open UI, Siebel Innovation Pack 2015

Topic	Description
"Administering Navigation Links" on page 54	Modified topic. It includes information about the fields to display the number of records in the location to which a link navigates.
"Constructing Expressions" on page 57	New topic. It includes information about how to construct an expression to restrict the number of records in the record count for the location to which a link navigates.

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

Table 4 lists the changes in this revision of the documentation to support this release of the software.

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

Table 4. New Product Features in Siebel eService Administration Guide for Siebel Open UI, Siebel Innovation Pack 2014

Topic	Description
"Tasks for Customers on the Siebel eService Web Site" on page 15	Modified topic. It includes information about performing tasks on the Siebel eService Web site.
"About Configuring Oracle Knowledge for Siebel eService" on page 30	New topic. It includes information about configuring Oracle Knowledge for Siebel eService.
"Configuration Tools for the Siebel eService Web Site" on page 31	Modified topic. It include information about Web templates on the Siebel eService Web site.
"Integrating Oracle Policy Automation With Siebel Public Sector eService" on page 32	New topic. It includes information about integrating Oracle Policy Automation with Siebel Public Sector eService.
"Setting Up the Applet for Twitter" on page 46	New topic. It includes information about how to set up the applet for Twitter on the Siebel eService Web site.
"Configuring the Applets for Program Information" on page 61	New topic. It includes information about how to configure the applets that contain program information on the Siebel eService Web site.
Chapter 6, "Using Siebel eService"	New chapter. It includes information about how customers can use the Siebel eService Web site.
Chapter 7, "Using Siebel Public Sector eService"	New chapter. It includes information about how citizens can use the Siebel Public Sector eService Web site.
"User Registration Initial Process Workflow" on page 103	Modified topic. It includes information about additional steps in the workflow.
"PUB Citizen User Registration Process Workflow" on page 107	New topic. It includes information about the PUB Citizen User Registration Process Workflow.
"PUB Citizen User Registration Forgot Password Process Workflow" on page 110	New topic. It includes information about the PUB Citizen User Registration Forgot Password Process Workflow.
"OPA Integration Workflow" on page 111	New topic. It includes information about the OPA Integration Workflow.
"OPA Integration Sub Workflow" on page 112	New topic. It includes information about the OPA Integration Sub Workflow.

Table 4. New Product Features in Siebel eService Administration Guide for Siebel Open UI, Siebel Innovation Pack 2014

Topic	Description
“PUB Citizen Create Case Activity Workflow” on page 126	New topic. It includes information about the PUB Citizen Create Case Activity Workflow.
“PUB Citizen Case Re-open Workflow” on page 126	New topic. It includes information about the PUB Citizen Case Re-open Workflow.

2

About Siebel eService

This chapter includes overview information about Siebel eService. It includes the following topics:

- [Tasks for Customers on the Siebel eService Web Site on page 15](#)
- [Tasks for Customer Service Representatives in Siebel eService on page 16](#)
- [Features of Siebel eService on page 16](#)
- [Requirements for Installing Siebel eService on page 17](#)
- [About Deploying Siebel eService on page 18](#)

Tasks for Customers on the Siebel eService Web Site

Siebel eService provides a Web site where customers can access service information. They can view more details on the Web site by clicking icons and drilling down on links.

Customers can perform the following tasks on the Siebel eService Web site:

- **Log in.** Customers who do not register on the Siebel eService Web site can view only certain sections of the Web site, such as company contact information. They can register on the Web site to create their profiles, and then gain access to additional functionality on the Web site, such as functionality to create and submit service requests and to update their profiles. For more information, see [“Registering on the Siebel eService Web Site” on page 75](#) and [“Accessing the Siebel eService Web Site” on page 76](#).

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

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

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

- **Manage user profiles.** Customers who register on the Siebel eService Web site can update their profile information and passwords. For more information, see [“Updating User Profiles” on page 76](#).

- **Obtain program information.** Customers can review program information. Program information includes news articles and frequently asked questions (FAQs) about programs. For more information, see [“Obtaining Program Information on the Siebel eService Web Site” on page 78.](#)
- **Find office locations.** Customers can find the company office locations that are nearest to them so that they can conveniently communicate with the people in these offices. They can view information about offices, such as postal addresses, phone numbers, and fax numbers. For more information, see [“Finding Office Locations of the Web Site Host” on page 80.](#)

Application administrators can link search results for office locations to map services so that customers can view applicable directions and a map from an online map service provider.
- **Send email to your company.** Customers can communicate through email with your company. For more information, see [“Sending Email to the Web Site Host” on page 81.](#)
- **Use Twitter.** Customers can use Twitter to communicate with your company and with other users of the Siebel eService Web site. For more information, see [“Accessing Twitter on the Siebel eService Web Site” on page 82.](#)
- **Manage service requests.** Customers who register on the Siebel eService Web site can submit, add updates to, and track service requests about issues that they encounter. For more information, see [“Managing Service Requests on the Siebel eService Web Site” on page 82.](#)

Tasks for Customer Service Representatives in Siebel eService

Because the Siebel eService Web site allows customers to serve themselves, customer service representatives have more time to work on other tasks. Customer service representatives can use Siebel eService to perform the following tasks to help customers:

- Review service requests that customers submit on the Siebel eService Web site and that Siebel Assignment Manager assigns to them.
- Access customer history that is independent of the channel of communication that the customer uses.
- Respond to email that customers submit on the Siebel eService Web site. Customer service representatives can view their inbound email queues, and for each message, view the related customer profile and service request information. Also, they can use solution records to compose replies to inbound email.
- Exchange knowledge and information with customers in Twitter on the Siebel eService Web site.
- Create and update user names and passwords for customers. The customer service representative typically must be authenticated by a directory, such as Netscape LDAP Directory Server or Microsoft Active Directory Server, using the Siebel security adaptor.

Features of Siebel eService

Siebel eService includes the following features:

- **Integration with your company Web site.** You can configure Web pages, views, applets, and cascading style sheets to conform to your business model and the look and feel of your company Web site. For more information, see [“Configuring Siebel eService” on page 30](#).
- **Web-delegated customer administrators.** In a business-to-business situation, you can create Web-delegated customer administrators for the customer company. These administrators can create and change information in customer profiles, such as the user names for their customers. Consequently, the administrative load at the host company is decreased. For more information, see [“About Authentication for Siebel eService” on page 52](#).
- **Data visibility controls.** You can control the views and data that customers can see on the Siebel eService Web site. The responsibility, organization, access group, and position of a customer determine these views and this data. For more information, see [“Access Control for Siebel eService” on page 53](#).
- **Email notifications.** By using Siebel Workflow, you can notify customers through email of changes in the status of their service requests. For more information, see [“About Email Notifications” on page 54](#).

NOTE: Email notifications are not included in the preconfigured Siebel eService application, but you can implement this feature.

Requirements for Installing Siebel eService

The following items are required to install Siebel eService:

- **Database server.** For a list of supported database servers, including version and connectivity software information, see *Siebel System Requirements and Supported Platforms* on Oracle Technology Network.
- **Siebel Enterprise Server.** For a list of Siebel Enterprise Server requirements, see *Siebel System Requirements and Supported Platforms* on Oracle Technology Network.
- **Web server.** For a list of supported Web servers, including vendor and hardware software configuration information, see *Siebel System Requirements and Supported Platforms* on Oracle Technology Network.

NOTE: For Siebel CRM product releases 8.1.1.9 and later and for 8.2.2.2 and later, the system requirements and supported platform certifications are available from the Certifications tab on My Oracle Support. For information about Certifications, see article 1492194.1 (Article ID) on My Oracle Support.

For more information about installing Siebel eService for Siebel Open UI, see *Siebel Installation Guide for Microsoft Windows* or *Siebel Installation Guide for UNIX*.

NOTE: The *Siebel Bookshelf* is available on Oracle Technology Network (<http://www.oracle.com/technetwork/indexes/documentation/index.html>) and Oracle Software Delivery Cloud. It might also be installed locally on your intranet or on a network location.

Siebel eService for Siebel Open UI uses the Self Service Object Manager (*LANG*) component (*SServiceObjMgr_lang* alias) in the Siebel Call Center component group. You must make sure that Siebel Open UI is enabled for this component by verifying that the *EnableOpenUI* and *HighInteractivity* parameters for this component are set to a value of *True*. For Siebel eService for Siebel Open UI, you must again implement any customizing that you implemented for Siebel eService for standard interactivity.

The configuration file for Siebel eService for Siebel Open UI is *sservice.cfg*, and the virtual directory for Siebel eService for Siebel Open UI is *sservice_lang*. For information about the setup tasks that you must perform to deploy Siebel eService for Siebel Open UI for an existing deployment that you originally installed for an earlier version, see [Chapter 3, "Setting Up Siebel eService."](#)

About Deploying Siebel eService

After Siebel eService is installed, you can configure it, administer it, and deploy it as an integrated part of your company Web site.

Using a text editor or an HTML authoring tool, you can change the Siebel Web templates (SWT files) and cascading style sheets to integrate the appropriate company layout and formatting. For example, you might change the background color or font size, and decide not to use the HTML frameset. For more information, see [Chapter 4, "Configuring Siebel eService."](#)

After the configuration of Siebel eService is complete, the application administrator can set up the functionality that customers can access on the Siebel eService Web site. For more information, see [Chapter 5, "Administering Siebel eService."](#)

After the configuration and administration tasks are complete, the application developer can work with the general Webmaster who can help integrate the Siebel eService Web site into your company Web site. Typical tasks for this integration follow:

- Copy new HTML and images to the public directory on the Web server computer.
- Add a new link from your company Internet or intranet Web site to Siebel eService.

3

Setting Up Siebel eService

This chapter includes information about the setup tasks that you must perform to deploy Siebel eService for Siebel Open UI for an existing deployment that you originally installed for an earlier version. It includes the following topics:

- [About Setting Up Siebel eService on page 19](#)
- [Roadmap for Setting Up Siebel eService on page 20](#)
- [About the Application Object Manager Components for Siebel eService on page 21](#)
- [Process of Adding the Application Object Manager Components for Siebel eService on page 21](#)
- [Process of Adding the Virtual Directories for Siebel eService on page 25](#)

About Setting Up Siebel eService

Siebel eService for Siebel Open UI was initially released in Siebel CRM version 8.1.1.11 and version 8.2.2.4. (These releases are also known as Siebel Innovation Pack 2013.) References in this chapter to the *current release* are to Siebel CRM version 8.1.1.11, version 8.2.2.4, or a later version.

Whether you must perform the tasks described in this chapter depends on which of the following installation cases applies to you:

- If you install the current release in a new deployment (or as a new installation) and perform the required configuration tasks after installation, or if you install the current release as a patch installation for an existing installation of Siebel Innovation Pack 2013 for which you previously performed the tasks in this chapter, then the Application Object Manager components and virtual directories for Siebel eService for Siebel Open UI are available for all installed and deployed languages. You do not have to perform the tasks described in this chapter.
- If you install the current release as a patch installation for an existing Siebel CRM installation of an earlier version, such as version 8.1.1.10, version 8.2.2.3, or an earlier version, then, to use this Siebel eService application, you must perform the tasks in this chapter. These tasks create the Application Object Manager components and virtual directories that Siebel eService for Siebel Open UI uses for all installed and deployed languages.

NOTE: For the Siebel Enterprise Server and the Siebel Web Server Extension (SWSE), installing a Siebel Fix Pack release for the current release as a patch installation is also called performing a migration installation. For more information about performing a migration installation, see the *Siebel Installation Guide* for the operating system you are using.

The tasks described in this chapter apply to any languages that are part of your existing deployment before you install the current release. For a multilingual deployment, you must perform some tasks multiple times, once for each language.

After you install the current release (using either of the installation cases) and set up Siebel eService for Siebel Open UI, you can use the Configuration Wizard tasks to deploy any additional languages on the Siebel Server and the SWSE. These tasks add all of the applicable Application Object Managers and virtual directories for these languages, including those for Siebel eService for Siebel Open UI. After you perform these tasks for the additional languages, you do not have to perform the tasks that are described in this chapter. For more information about installing and deploying Siebel Business Applications with multiple languages, see the *Siebel Installation Guide* for the operating system you are using.

Roadmap for Setting Up Siebel eService

To set up Siebel eService for Siebel Open UI for an existing deployment, perform the following processes and tasks:

- 1 Review the information in [“About Setting Up Siebel eService” on page 19](#).
For more information about installing Siebel eService, see [“Requirements for Installing Siebel eService” on page 17](#).
- 2 Install the current release of Siebel CRM as a patch installation (migration installation) for an existing installation of Siebel CRM version 8.1.1.10, version 8.2.2.3, or an earlier version.
NOTE: The overall installation process includes many specific tasks and requirements that are not mentioned in this topic. For more information about installing Siebel CRM, see the *Siebel Installation Guide* for the operating system you are using.
- 3 Run Incremental Repository Merge for the Siebel database.
NOTE: You must run Incremental Repository Merge after you install the current release of Siebel CRM as a patch installation (migration installation) for an existing installation of an earlier version. For more information about running Incremental Repository Merge, see *Siebel Database Upgrade Guide*.
- 4 Add the Application Object Manager components for Siebel eService for Siebel Open UI.
For more information, see [“Process of Adding the Application Object Manager Components for Siebel eService” on page 21](#).
- 5 Add the virtual directories on the Web server for Siebel eService for Siebel Open UI.
For more information, see [“Process of Adding the Virtual Directories for Siebel eService” on page 25](#).

About the Application Object Manager Components for Siebel eService

The Application Object Manager component for Siebel eService for Siebel Open UI is Self Service Object Manager (*LANG*), where *LANG* is the three-letter code for each applicable language, such as ENU for U.S. English or JPN for Japanese. The alias for this component is *SServiceObjMgr_lang*, such as *SServiceObjMgr_enu* or *SServiceObjMgr_jpn*. These components are defined in the Siebel Call Center component group. The application name for these components is Siebel Service Portal. These components use the *sservice.cfg* configuration file.

Perform the tasks to create and configure these server components for existing installations for which these components are not currently defined. For more information, see [“Process of Adding the Application Object Manager Components for Siebel eService” on page 21](#).

Then you perform the task to create the corresponding virtual directories on the Web server to support these components.

Process of Adding the Application Object Manager Components for Siebel eService

To add the Application Object Manager components, perform the following tasks:

1 [“Editing the new_comp_sia.dat File” on page 21](#)

Edit the *new_comp_sia.dat* file to include a definition for the Self Service Object Manager component.

2 [“Running the new_compdef_sia Script” on page 24](#)

Perform these tasks on each Siebel Server on which you run these components. Repeat these tasks, as needed, for each additional language that you support. For more information, see [“About the Application Object Manager Components for Siebel eService” on page 21](#).

NOTE: Perform this process only if it is required for your installation case. For more information, see [“About Setting Up Siebel eService” on page 19](#).

This process is a step in [“Roadmap for Setting Up Siebel eService” on page 20](#).

Editing the new_comp_sia.dat File

You edit the *new_comp_sia.dat* file to define the Self Service Object Manager (*LANG*) component, where *LANG* is an installed language. You can edit this file and then run the *new_compdef_sia* script on additional Siebel Servers, as necessary.

NOTE: For any additional languages that you support for this application, repeat the following task (but change the content that you specify in [Step 7 on page 22](#)) and repeat the task in [“Running the new_compdef_sia Script” on page 24](#).

This task is a step in “[Process of Adding the Application Object Manager Components for Siebel eService](#)” on page 21.

To edit the new_comp_sia.dat file

- 1** Stop the Siebel Server.
- 2** For the Siebel Gateway Name Server, complete the following steps:
 - a** Stop the Siebel Gateway Name Server.
 - b** Back up the siebns.dat file on the Siebel Gateway Name Server.
 - c** Restart the Siebel Gateway Name Server.
- 3** On the Siebel Server computer, navigate to *SI EBSRVR_HOME/bin/lang*.

In this directory, *SI EBSRVR_HOME* is the Siebel Server installation location, and *lang* is the three-letter code for the language for which you edit the new_comp_sia.dat file. (Use the backslash for Microsoft Windows; use the forward slash for UNIX or Linux.)
- 4** Back up the existing file new_comp_sia.dat.
- 5** Using an appropriate text editor, such as Notepad on Microsoft Windows, open the new_comp_sia.dat file.

NOTE: When you edit new_comp_sia.dat, do not enter any special characters, such as tabs.
- 6** If the file does not contain a section for the Siebel Call Center component group, then add the following information in the component group section of the file:
 - a** As needed, append an entry for the CallCenter component group, defined as follows:

```
[Component Group]
CallCenter = Siebel Call Center
```
 - b** As needed, create a section for the CallCenter component group, defined as follows:

```
[Call Center]
FullName = Siebel Call Center
Description = Siebel Call Center Components
CreateDisabled = TRUE
```
- 7** Add the following information in the component section of the file:
 - a** Add a new entry for the Self Service Object Manager component in the existing components section, defined as follows:

```
[Components]
SServiceObjMgr_enu = Self Service Object Manager (ENU)
```

In this example, you add the required definitions for U.S. English (ENU) in the new_comp_sia.dat file located in *SI EBSRVR_HOME/bin/ENU*. Substitute other language codes as needed for your specific task. For example, you can add the required definitions for French (FRA).

- b Add a new section for the Self Service Object Manager component, defined as follows:

```
[SServiceObjMgr_enu]
FullName      = Self Service Object Manager (ENU)
Alias         = ISSObjMgr
Description   = Siebel Self Service Object Manager
CompGrp      = Call Center
CompType     = AppObjMgr
FixedParam: DataSource          = ServerDataSrc
FixedParam: Lang                = ENU
Param: CfgRepositoryFile       = siebel_sia.srf
Param: LocalCode                = ENU
Param: MaxTasks                 = 20
FixedParam: ConfigFile         = sservice.cfg
FixedParam: NamedDataSource     = ServerDataSrc, GatewayDataSrc, DataMart
Param: CFGApplicationName      = Siebel Service Portal
Param: CFGApplicationTitle     = Siebel Service Portal
Param: CFGApplicationSplashText = Siebel Service Portal
Param: SearchDefName           = SelfServiceDefiniton
Param: ProxyEmployee           = PROXYE
Param: Logindomain              = EXTERNAL
Param: AllowAnonUsers           = TRUE
Param: EnableCDA                = FALSE
Param: EnableEmailClientAutomation = FALSE
Param: ListRowStyle             = Siebel List
Param: LoginView                = Login View (SelfService)
Param: SystemSWFName            = dCCHtmlType.swf
Param: UserAgentFile            = ua.ini
Param: AllowAnonUsers           = TRUE
Param: AppletSelectStyle       = Applet Select
Param: HighInteractivity       = TRUE
Param: EnableOpenUI             = TRUE
```

NOTE: The information that you specify includes several required parameter settings for the component. Some of the parameters enable Siebel Open UI, which this application requires. You can use Siebel Server Manager to configure several of the parameter settings later, for example, to tune application performance.

- 8 Save the new_comp_sia.dat file.

Next, run the new_compdef_sia script. For more information, see [“Running the new_compdef_sia Script” on page 24.](#)

Running the new_compdef_sia Script

You run the new_compdef_sia script to add the server component definition that you add in the new_comp_sia.dat file that you edit for each language. For each language, the script adds the Application Object Manager component that Siebel eService for Siebel Open UI (the Self Service Portal application) uses. Perform this task immediately after you perform the task to edit the new_comp_sia.dat file. For more information, see [“Editing the new_comp_sia.dat File” on page 21](#).

When you run the script, you must specify the same language that you specify within the edited sections of the new_comp_sia.dat file.

NOTE: For any additional languages that you support for this application, repeat the task in [“Editing the new_comp_sia.dat File” on page 21](#) (but change the content that you specify in [Step 7 on page 22](#)) and repeat this task.

This task is a step in [“Process of Adding the Application Object Manager Components for Siebel eService” on page 21](#).

To run the new_compdef_sia script

- 1 Log in as a Siebel administrator user on the Siebel Server computer.
- 2 Set the SIEBEL_HOME environment variable to SES_HOME/si ebsrvr. (Use the backslash for Microsoft Windows; use the forward slash for UNIX or Linux.)
- 3 Open a command window or shell window and run a command as follows:
 - On Microsoft Windows, run a command like the following command:

```
new_compdef_sia.bat siebelgatewaynameserver:port siebelenterprise username password language
```
 - On UNIX or Linux operating systems, run a command like the following command:

```
./new_compdef_sia.ksh siebelgatewaynameserver:port siebelenterprise username password language
```

In these commands, *siebelgatewaynameserver* is the name of the Siebel Gateway Name Server, *port* is the port number that it uses, *siebelenterprise* is the name of the Siebel Enterprise, *username* is the name of the account that runs the script, *password* is the password for this account, and *language* is the language for which you create the Application Object Manager component. Specifying the port number is optional if the Siebel Gateway Name Server uses the default port number, 2320.

For example, on Microsoft Windows, you might run a command like the following command:

```
new_compdef_sia.bat siebgtwy1 myenterprise sadmi n password ENU
```

- 4 When prompted, verify that the parameters are correct.
- 5 For each language, repeat [Step 3](#) and [Step 4](#).

6 Restart the Siebel Server.

The new component is added for each specified language.

Next, create the virtual directories. For more information, see [“Process of Adding the Virtual Directories for Siebel eService” on page 25](#).

Process of Adding the Virtual Directories for Siebel eService

To add the virtual directories, perform the following tasks:

1 [“Editing the new_virdirs Script” on page 25](#)

Edit the new_virdirs script to include the virtual directory name required for Siebel eService for Siebel Open UI (the Self Service Portal application).

2 [“Running the new_virdirs Script” on page 26](#)

Run the new_virdirs script and specify all of the languages for which you want to create a virtual directory.

Perform these tasks on each Web server where you install Siebel Web Server Extension (SWSE) and on which you require these virtual directories. This process also updates the eapps.cfg file for the SWSE to add language-specific application sections. Perform this process only once so that multiple sections are not added to the file.

NOTE: Perform this process only if it is required for your installation case. For more information, see [“About Setting Up Siebel eService” on page 19](#).

This process is a step in [“Roadmap for Setting Up Siebel eService” on page 20](#).

Editing the new_virdirs Script

You edit the new_virdirs script to specify the virtual directory name that Siebel eService for Siebel Open UI (the Self Service Portal application) requires. The virtual directory name is also used for the application section in the eapps.cfg file. You can run an edited script on additional Web servers, as necessary.

This task is a step in [“Process of Adding the Virtual Directories for Siebel eService” on page 25](#).

To edit the new_virdirs script

1 Stop the Web server.

2 Back up the eapps.cfg file and the Web server configuration file, such as obj.conf, http.conf, magnus.conf, and so on.

3 Navigate to *SWSE_HOME/conf* g.

In this directory, *SWSE_HOME* is the SWSE installation location. (Use the backslash for Microsoft Windows; use the forward slash for UNIX or Linux.)

- 4 Back up the existing new_virdirs script as follows:
 - On Microsoft Windows, the name of the script is new_virdirs.bat.
 - On UNIX or Linux, the name of the script is new_virdirs.sh.
- 5 Using an appropriate text editor, such as Notepad on Microsoft Windows, open new_virdirs.bat or new_virdirs.sh.

NOTE: When you edit the script, do not enter any special characters, such as tabs.

- 6 Add the elements for the Self Service Portal application to an existing entry in this file as follows so the file creates a new virtual directory and new eapps.cfg file section for the application:

```
%JAVA_HOME%\j ava -j ar %ORACLE_HOME1%\confi g\new_vi rdi rs. j ar
{sal esm, servi cem, sservi ce} {Sal esmObj Mgr, Servi cemObj Mgr, SServi ceObj Mgr}
{epharmam, cgm} {ePharmaMObj Mgr, CGMObj Mgr} %LANG
```

In this entry, sservi ce is the name of the virtual directory and SServi ceObj Mgr is the name of the corresponding Application Object Manager, in each case without the corresponding language code. (The language-specific items are created when you run the script.)

- 7 Save the new_virdirs script.

Next, run the new_virdirs script to add the virtual directories for all specified languages. For more information, see ["Running the new_virdirs Script" on page 26](#).

Running the new_virdirs Script

You run the new_virdirs script to add the virtual directories for all specified languages that Siebel eService for Siebel Open UI (the Self Service Portal application) uses. Perform this task immediately after you perform the task to edit the new_virdirs script. For more information, see ["Editing the new_virdirs Script" on page 25](#).

NOTE: If running the new_virdirs script does not create the required virtual directories, then you must restore the files on the Web server from the backup files that you create in [Step 2 on page 25](#).

This task is a step in ["Process of Adding the Virtual Directories for Siebel eService" on page 25](#).

To run the new_virdirs script

- 1 Navigate to *SWSE_HOME/confi g*.
- 2 Open a command window or shell window and run a command as follows:

- On Microsoft Windows, run a command like the following command:

```
new_vi rdi rs. bat / languages
```

- On UNIX or Linux operating systems, run a command like the following command:

```
./new_vi rdi rs. sh / languages webserver/ locati on
```

In these commands, *languages* is a three-letter language code or a comma-separated list of language codes, and *webserver/location* is the installation location of the Web server instance.

For example, on Microsoft Windows, you might enter a command like the following command to create the virtual directories for U.S. English (ENU), French (FRA), and Japanese (JPN):

```
new_virtual_dirs.bat ENU, FRA, JPN
```

- 3 Specify the anonymous user for Siebel eService for Siebel Open UI by adding parameters like the following parameters to the `eapps.cfg` file:

```
AnonUserName = guestusername  
AnonPassword = guestuserpassword
```

Specify the anonymous user name and password in each language-specific application section, `[/sservice_lang]`.

NOTE: Add values similar to the values defined for other applications, such as Siebel eService for standard interactivity. In most cases, the `AnonPassword` value represents an encrypted value. To specify a different password, encrypt the password first by using the `encryptstring` utility. For more information, see *Siebel Security Guide*.

- 4 Restart the Web server.
- 5 Start a browser and start the Self Service Portal application by entering an appropriate URL, such as the following URL for French:

```
https://server_name/sservice_fra
```


4

Configuring Siebel eService

This chapter includes information about configuring the look and feel of the Siebel eService Web site. It includes the following topics:

- [About Configuring Siebel eService on page 29](#)
- [About Configuring Oracle Knowledge for Siebel eService on page 30](#)
- [Configuring Siebel eService on page 30](#)
- [Configuration Tools for the Siebel eService Web Site on page 31](#)
- [Integrating Oracle Policy Automation With Siebel Public Sector eService on page 32](#)
- [Setting Up the Applet for Twitter on page 46](#)

About Configuring Siebel eService

You can use Siebel Tools to perform the following tasks to configure Siebel eService for your business model:

- Configure Siebel business components, applets, views, and all other objects of Siebel eService as needed. For example, set declarative properties or add Web scripts.
- Create new controls, applets, views, or Web pages as needed, and add charts to views, as needed.
- Associate applets, views, and Web pages with the appropriate Siebel Web templates (SWT files).
- Map the fields, controls, and applets to the placeholders in the appropriate template.
 - Fields and controls are mapped into an applet.
 - Applets are mapped into a view.
 - Views are mapped to a Web page (a Web page container).

In Siebel Tools, the application name for configuring Siebel eService is Siebel Service Portal. For more information, see *Configuring Siebel Open UI*.

About Configuring Oracle Knowledge for Siebel eService

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

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

Administrators can use the Knowledge Management Configuration view of the Administration - Application screen to set up additional criteria for the information about programs in applets on the Siebel eService Web site. This view shows the URL of the Information Manager Server for Oracle Knowledge. A custom physical renderer that is associated with the applets reads the additional criteria and uses widgets in Oracle Knowledge to pass the configuration information to the server for Oracle Knowledge. The physical renderer then gets the resulting data from the server and displays it in the applets. For more information about setting up the additional criteria, see [“Configuring the Applets for Program Information” on page 61](#).

Configuring Siebel eService

You can configure the look and feel of the Siebel eService Web site to incorporate the brand identity of your company. The Siebel eService Web site includes Siebel Web templates (SWT files) and controls (such as buttons and drop-down lists) that you can configure.

Configuring Siebel eService is a modular process that separates style and structure (cascading style sheets and Siebel Web templates) from the binding to data (HTML display objects). You can use Siebel Web templates to reuse style and structure across multiple HTML display objects to propagate style and structure changes across HTML display objects.

To configure Siebel eService

- 1 Identify the Web pages, views, applets, and other objects of Siebel eService that you want to change.
- 2 Using a text editor or an HTML authoring tool, change the Siebel Web templates (SWT files) as necessary to incorporate the appropriate company layout and formatting.
- 3 Using Siebel Tools, associate each applet with an Applet Web template, each view with a View Web template, and each Web page with a Page Container Web template.
- 4 Using Siebel Tools, configure the HTML display objects (controls, applets, and views).

- Define new applets, views, and Web pages for Siebel eService.
 - Define drilldowns where appropriate, such as from summary information to detailed information.
 - Establish mapping between controls and list columns to the corresponding placeholders in the Applet Web templates.
- 5 Compile the repository changes into an SRF file.
 - 6 Test and debug the configuration.

Configuration Tools for the Siebel eService Web Site

Siebel eService includes a set of Siebel Web templates and style sheets that determine the look and feel of the Siebel eService Web site. You change Siebel Web templates and style sheets by using a text editor or an HTML authoring tool. Additionally, a set of object definitions (controls) are grouped together according to object functions and object characteristics. You change Siebel object definitions (controls) by using Siebel Tools. For information about working with Siebel Web templates, cascading style sheets, and controls, see *Using Siebel Tools*.

The configuration tools for the Siebel eService Web site are as follows:

- **Page Container Web Template.** Displays persistent information, such as help, logout links, or a company logo. This template is `CCPageContainer_ss.swt`.
 - The following templates apply to views:
 - **View Web Template.** Defines the layout of a view. This template is `CCViewContainer_Home_ss.swt`.
 - **View With Home Page Web Template.** Defines the layout of the view for the home page. This template is `SSViewContainer_Home.swt`.

View templates dictate how the applets are mapped or placed.
 - **Applet Web Template.** Defines the layout of an applet. This template is `CCAppletFormGridLayout_ss.swt`.
- Applet templates dictate how the controls and fields are mapped or placed.
- The following templates apply to form applets:
 - **Applet Form Section Web Template.** Defines the layout of a form applet. This template is `CCAppletFormSection_ss.swt`.
 - **Detail Applet Web Template.** Defines the layout of a detailed form applet. This template is `SSAppletDetailForm.swt`.
 - **Form Applet Web Template.** Defines the layout of a form applet. This template is `SSAppletFormGridLayout.swt`.
 - **Form Base Applet Web Template.** Defines the layout of a form applet in an applet that can display forms or tiles. This template is `SSAppletFormGridLayout_Base.swt`.

- The following template applies to list applets:
 - **Oracle Knowledge Applet Web Template.** Defines the layout of the program applet and the news article applet for Oracle Knowledge. This template is SSAppletOKList.swt.
- The following templates apply to tile applets:
 - **Tile List Applet Web Template.** Defines the layout of a tile list applet. This template is CCAppletList_Tile_NavLink_ss.swt.
 - **Vertical Tile List Applet Web Template.** Defines the layout of a tile list applet when the tiles appear vertically. This template is SSAppletVerticalTile.swt.
 - **Attachment Tile Applet Web Template.** Defines the layout of an attachment tile applet. This template is CCAppletList_Tile_SRAttachments_ss.swt.
- The following templates apply to other applets:
 - **Login Applet Web Template.** Defines the layout of the login applet. This template is SSAppletLogin.swt.
 - **Explicit Login Applet Web Template.** Defines the layout of the login applet when you must log in to the eService Web site again. This template is SSAppletExplicitLogin.swt.
 - **Oracle Knowledge Search Applet Web Template.** Defines the layout of the Oracle Knowledge search applet. This template is SSAppletOKSearch.swt.
 - **Social Media Applet Web Template.** Defines the layout of a social media applet. This template is SSAppletSingleDiv.swt.
- **Cascading Style Sheets.** Determine the color schemes and other styles in the Siebel Web templates. You can change the rules-defined style sheet to configure the appearance of the Siebel eService Web site. For more information about using cascading style sheets to configure the appearance of the Siebel eService Web site, see *Configuring Siebel Open UI*.
- **Controls.** Determine how customers interact with the Siebel eService Web site. A control is functionality in the applet that usually shows data from a field in the business component or invokes programming logic. One control that is set up in Siebel Tools corresponds to one data control in an applet, such as a text box, check box, or command button.

Integrating Oracle Policy Automation With Siebel Public Sector eService

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

- [“Prerequisites for Integrating Oracle Policy Automation” on page 33](#)
- [“Setting the Application Level User Property” on page 34](#)
- [“Configuring the Inbound Web Service for OPA Metadata Web Service” on page 35](#)
- [“Exposing the Siebel Metadata to OPA” on page 35](#)
- [“Setting Up the OPA Hub Connection” on page 36](#)

- [“Securing Web Service Communications with Oracle Policy Automation” on page 37](#)
- [“Showing Details of Oracle Policy Automation in Siebel Public Sector eService” on page 38](#)
- [“Control Types for Integrating Oracle Policy Automation” on page 39](#)
- [“Custom Properties for Control Types” on page 39](#)
- [“Custom Properties for Screens” on page 41](#)
- [“Custom Properties for Entities” on page 42](#)
- [“Manifest Files for View and Applet of OPA Interview Service” on page 43](#)
- [“Parameters for Configuring Interview Sessions” on page 44](#)

Prerequisites for Integrating Oracle Policy Automation

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

- Create and deploy the rulebases in OPA.

Sample rulebase projects are packaged in Siebel Tools, and you can extract the rulebase projects from the following directories:

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

```
Tools_install_location\REPPATCH\ApplyForBenefits.zip
```

When you deploy the sample rulebase for screening, you must change its deployment name to Screening so that it functions with the preconfigured OPA integration. Similarly, when you deploy the sample rulebase applicable to applying for benefits, its deployment name must be ApplyForBenefits so that it functions with the preconfigured OPA integration.

- Activate the appropriate workflows.
 - For implementations applicable to releases before Innovation Pack 2015, Patchset 5, activate the following workflows:
 - OPA Integration Workflow. You must also reload the runtime events for this workflow. For more information about this workflow, see [“OPA Integration Workflow” on page 111](#).
 - OPA Integration Sub Workflow. For more information about this workflow, see [“OPA Integration Sub Workflow” on page 112](#).
 - For implementations applicable to release Innovation Pack 2015, Patchset 5 or later, activate the following workflows:
 - OPA Interview Service Main Workflow. For more information about this workflow, see [“OPA Interview Service Main Workflow” on page 113](#).
 - OPA Interview Service Sub Workflow. For more information about this workflow, see [“OPA Interview Service Sub Workflow” on page 119](#).
 - OPA Get PreSeed Data Workflow. For more information about this workflow, see [“OPA Get PreSeed Data Workflow” on page 117](#).

- OPA Process Submit Data Workflow. For more information about this workflow, see [“OPA Process Submit Data Workflow” on page 123](#).
 - OPA End Interview Workflow. For more information about this workflow, see [“OPA End Interview Workflow” on page 123](#).
 - OPA Get Meta Data Service For PUB Sample Intake Contact Workflow. For more information about this workflow, see [“OPA Get Meta Data Service For PUB Sample Intake Contact Workflow” on page 124](#).
 - OPA Metadata Service - CheckAlive Workflow. For more information about this workflow, see [“OPA Metadata Service - CheckAlive Workflow” on page 125](#).
- Use the InvokeWorkflow method in the appropriate business service to call the appropriate workflow.
- For implementations applicable to releases before Innovation Pack 2015, Patchset 5, the Invoke Workflow method in the OPA Interface Service business service calls the OPA Integration Workflow. For information about other methods in this business service, see [“OPA Integration Workflow” on page 111](#) and [“OPA Integration Sub Workflow” on page 112](#).
 - For implementations applicable to release Innovation Pack 2015, Patchset 5 or later, the Invoke Workflow method in the OPA Interview Framework Service business service calls the OPA Interview Service Main Workflow. For more information about the methods in this business service, see [Appendix B, “Business Services for Oracle Policy Automation.”](#)

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

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

For implementations applicable to release Innovation Pack 2015, Patchset 5 or later, you can use the Close Button LIC parameter and the IsCloseButtonRequired parameter to configure the Close button. For more information about these parameters, see [“Parameters for Configuring Interview Sessions” on page 44](#).

Setting the Application Level User Property

If you want to integrate Oracle Policy Automation (OPA) with Siebel Public Sector Self Service, you must first set up the application level user property for new applications. This allows the OPA Interview Screen on the Siebel Open UI client to invoke the Siebel Business Service to post the Interview data.

To set the application level user property

- Add the following application level user property to the Application object in the repository:
 - **User Property Name.** Enter ClientBusinessService.

- **Value.** Enter the name of the business service.

NOTE: For the Siebel Citizen Service Portal application, the ClientBusinessService business service is already set to OPA Interview Framework Service.

Configuring the Inbound Web Service for OPA Metadata Web Service

If you want to integrate Oracle Policy Automation (OPA) with Siebel Public Sector Self Service, you must first configure the inbound Web service for OPA Metadata Web service.

NOTE: To work with inbound Web services you must be in the Siebel Call Center client.

To configure the Inbound Web service for OPA Metadata Web Service

1 In Siebel Call Center, choose Site Map and locate Inbound Web Services.

2 Create the required Web service records in the Inbound Web Services list.

NOTE: For more information on working with Inbound Web services and service ports, see *Siebel CRM Web Services Reference*.

3 Create a new service port for each Web service record in the Service Ports list.

NOTE: For more information, see [“OPA Get Meta Data Service For PUB Sample Intake Contact Workflow”](#) on page 124.

4 Create an operation record for each newly created service port in the Operations list, using the following parameter values:

- **Name.** Enter the operation name in the correct format. For example, if the CheckAlive method has the prefix Sample, then the operation Name is SampleCheckAlive.
- **Request Filter Service Display.** Enter Metadata Filter Service.
- **Request Filter Method Display.** Enter Request Filter Method.
- **Response Filter Service Display.** Enter Metadata Filter Service.
- **Response Filter Method Display.** Enter Response Filter Method.

Exposing the Siebel Metadata to OPA

This task is required if you need to expose the Siebel OPA integration objects (other than contacts) to OPA for metadata mapping.

NOTE: The Contacts integration object is available as standard in Siebel OPA integration.

The OPA metadata service is implemented based on OPA-defined XSD schema. In the request message description, the Siebel server expects the *OperationName_Input* element, but it is unavailable. Also, the Siebel server adds the *OperationName_Output* element in the response message description. To overcome this issue, the Siebel server uses a filter service to add the *OperationName_Input* element and to remove the *OperationName_Output* element.

To expose the Siebel metadata to OPA

- 1 Do one of the following:
 - Modify the existing workflow “[OPA Get Meta Data Service For PUB Sample Intake Contact Workflow](#)” on page 124 to expose the new integration object.

Step 1 of this workflow uses the PUB Sample Intake Contact integration object in the input argument, however you can change this to suit your requirements.
 - Create a new workflow similar to the “[OPA Get Meta Data Service For PUB Sample Intake Contact Workflow](#)” on page 124 and use the Integration Object name in the input argument in the Get IO Definition step. In the Inbound Web Service, choose the newly created Workflow in the Service Ports applet.

Setting Up the OPA Hub Connection

This procedure is mandatory if a metadata service is used.

To set up an OPA Hub Connection

- 1 Set up a connection to a Web service data source.

For more information, see the *Oracle Policy Automation Documentation Library*.
- 2 Update the connection details in the OPA hub as follows:
 - **Name.** Enter the name of the new connection.
 - **URL.** Enter the URL, which is available in the Address field of the Service Port view located in the Administration View for Inbound Web Services.
 - **Version.** Enter the correct Web services version. For example:
`http://xmlns.oracle.com/policyautomation/hub/12.2/metadata/types`
 - **SOAP Action Pattern.** Enter a pattern in the following format:
`document/version:prefix of operation name{0}`

For example:
`document/http://xmlns.oracle.com/policyautomation/hub/12.2/metadata/types:PUBContact_{0}`

NOTE: Use the same version that you used in the Version field. You must also use the same operation prefix name as described in Step 4 in “[Configuring the Inbound Web Service for OPA Metadata Web Service](#)” on page 35.
 - **Requires WS-Security Username token in SOAP actions.** Enter your Siebel user login details.

Securing Web Service Communications with Oracle Policy Automation

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

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

To secure Web service communications with Oracle Policy Automation

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

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

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

Some fields are described in the following table.

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

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

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

3 Change the following:

- **Secure Connection.** Change to YES or TRUE.
- **SSO System Name.** Change to the system name that you designate in [Step 2](#) (for example, OPA_INT).
- **Siebel Login Id.** Change to the login name that you designate in [Step 2](#) (for example, SADMIN).

For implementations applicable to releases before Innovation Pack 2015, Patchset 5, these values are process properties in the OPA Integration Sub Workflow. For implementations applicable to release Innovation Pack 2015, Patchset 5 or later, these values are parameters in the OPA Integration Mapping View of the Administration - Integration screen.

Showing Details of Oracle Policy Automation in Siebel Public Sector eService

To show the details of Oracle Policy Automation in Siebel Public Sector eService, you create a runtime event.

To show details of Oracle Policy Automation in Siebel Public Sector eService

- 1 In Siebel Public Sector, navigate to the Administration - Runtime Events screen, then the Action Sets view.
- 2 In the Action Sets list, create a new record, and complete the fields as appropriate.
An action set with a name of OPA_BusSvc is available in the preconfigured Siebel application.
- 3 In the Actions list for the new action set, create a new record, and complete the fields as appropriate.

Some fields are described in the following table.

Field	Comments
Name	Type the name of the action. An action with a name of OPA_Action is available in the preconfigured Siebel application.
Action Type	Select an action type of BusService.
Sequence	Type a sequence of 1.
Business Service Name	Type the following name: Dyna Frame UI Service.
Business Service Method	Type the following method: BuildDynaFrame

- 4 Navigate to the Events view.

- 5 In the Events list, create a new record, and complete the fields as appropriate.

Some fields are described in the following table.

Field	Comments
Sequence	Type a sequence of 1.
Object Type	Select an object type of Applet.
Object Name	Select the applet that is used to render the Oracle Policy Automation interview session (for example, OPA Interview Service List Applet).
Event	Select an event of DisplayApplet.
Action Set Name	Type the action set name that you create in Step 2 .

Control Types for Integrating Oracle Policy Automation

Table 5 compares the control types in Oracle Policy Modeling (OPM), in Siebel Public Sector eService, and in HTML files for Web pages in Siebel Public Sector eService.

Table 5. Control Types in OPM, Siebel Public Sector eService Web Sites, and HTML Files

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

Custom Properties for Control Types

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

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

Custom Properties for Labels

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

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

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

where:

Label 1 is the value for this key.

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

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

where:

Label 1 is the value for this key.

Custom Properties for Images

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

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

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

where:

`SBL_IMG_ID` is the value for this key.

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

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

```
</img>
```

Custom Properties for Additional Controls

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

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

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

where:

SBL_LBL_1 is the value for the SBL_LBL_ID key.

SBL_CTRL_1 is the value for the SBL_CTRL_ID key.

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

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

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

Custom Properties for Screens

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

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

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

- **SBL_TEMPLATE_NAME.** Specifies the template name for the screen.
You use the value for this key when you designate the name of the HTML file for a Web page.
- **SBL_TITLE_ID.** Specifies the ID of the title for the screen.
You use the value for this key when you designate the attribute ID value of the title for a screen in the HTML file for a Web page. An example follows:

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

where:

SBL_TITLE is the value for this key.

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

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

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

where:

SBL_BTN_NEXT is the value for this key.

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

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

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

where:

SBL_BTN_BACK is the value for this key.

- **SBL_IS_LAST_SCREEN.** Specifies whether the screen is the last screen in a series of screens.

For the last screen in a series of screens, enter a value of YES for this key. For other screens in the series, enter a value of NO for this key.

Custom Properties for Entities

Custom properties for entities allow you to render them in the user interface. This functionality is supported for implementations applicable to release Innovation Pack 2015, Patchset 5 or later.

In the Oracle Policy Modeling tool, you can define the following custom properties for entities, and provide a value for each custom property:

- **SBL_ENTITY_ID**

You use the this custom property in the HTML file to design the layout for the entity data capture. AssetId indicates the entity in the user interface in [“Example HTML file for Entity Custom Properties” on page 43](#).

Entity control can be rendered as a list applet (or Grid) or tile applet (or Card). For a list applet, you create a div element with an ID attribute that contains the value in the SBL_ENTITY_ID custom property and a data-mode attribute of Grid. The first 3 lines of the example HTML code apply to a grid.

For a tile applet, you create a div element with ID attribute that contains the value in the SBL_ENTITY_ID custom property and a data-mode attribute of Tile. Include the layout showing how the fields are rendered in the tile record. The div id has a value such as #tile_1. The lines after the first 3 lines of example HTML code apply to a tile.

■ SBL_ENTITY_TITLE

You can use this optional custom property if you want to have a custom label for the entity in the Siebel user interface. This custom property refers to a label control, and uses the text in that label control. For example, if the value for this custom property is CON_ASSET_LABEL for the financial asset entity, the label control in the entity must have a SBL_LBL_ID custom property with a value of CON_ASSET_LABEL.

Example HTML file for Entity Custom Properties

If you want to provide the Grid and Card toggle button in the user interface, then your HTML file must include both the Grid and Tile layout configuration in the following example:

```
<div id="AssetId" class="siebui -span-xs-12 siebui -span-sm-12 siebui -span-md-12
siebui -span-lg-12 siebui -span-xl -12" data-mode="Grid">
</div>
<div class="siebui -applet-fg siebui -span-xs-12 siebui -span-sm-12 siebui -span-md-12
siebui -span-lg-12 siebui -span-xl -12">
  <div id="AssetId" data-mode="Tile">
    <div id="#tile_1">
      <div class="siebui -span-xs-12 siebui -span-sm-12 siebui -span-md-6
siebui -span-lg-6 siebui -span-xl -6">
        <div class="siebui -label">
          <span id="AssetType_Lbl" style="display: none;"></span>
        </div>
        <div class="siebui -value">
          <input id="AssetType_Ctrl" style="display: none;" type="text"
name="AssetType_Ctrl" aria-labelledby="AssetType_Lbl"/>
        </div>
      </div>
      <div class="siebui -span-xs-12 siebui -span-sm-12 siebui -span-md-6
siebui -span-lg-6 siebui -span-xl -6">
        <div class="siebui -label">
          <span id="Amount_Lbl" style="display: none;"></span>
        </div>
        <div class="siebui -value">
          <input id="Amount_Ctrl" style="display: none;" type="text"
name="Amount_Ctrl" aria-labelledby="Amount_Lbl"/>
        </div>
      </div>
    </div>
  </div>
</div>
</div>
```

Manifest Files for View and Applet of OPA Interview Service

In Siebel Public Sector, you can navigate to the Manifest Administration view of the Administration - Application screen to access the manifest files for the following objects:

■ OPA Interview Service View (Usage Type field of Presentation Model).

This object includes the opaviewpm.js file. This JavaScript file processes user actions, such as Next, Back, Close, Save, and Submit. It also processes error responses from Oracle Policy Automation (OPA), and shows the appropriate error message to the user.

■ OPA Interview Service View (Usage Type field of Physical Renderer).

This object includes the opaviewpr.js file. This JavaScript file loads the HTML templates and associates them with the DOM (Document Object Model). It binds the runtime events with the view buttons. User actions, such as Next, Back, Close, Save, and Submit, are associated with runtime events.

■ OPA Interview Service List Applet (Usage Type field of Presentation Model).

This object includes the dynacontrollistpm.js file. This JavaScript file processes the data that the server forwards, and relays this data to the listpmodal.js file.

■ OPA Interview Service List Applet (Usage Type field of Physical Renderer).

This object includes the following files:

- dynacontrolgridpr.js. This JavaScript file renders the interview screen in tabular format, inherited from the jqgridrenderer.js file.
- dynacontrolformpr.js. This JavaScript file renders the interview session in form format.
- dynacontrolportraitpr.js. This JavaScript file renders the interview session in tile format.

Parameters for Configuring Interview Sessions

In Siebel Public Sector, you can navigate to the OPA Integration Mapping View of the Administration - Integration screen to configure parameters that control the behavior and appearance of the user interface for interview sessions. These parameters also control security features of interview sessions.

Table 6 describes the parameters you can use to configure interview sessions.

Table 6. Parameters for Configuring Interview Sessions

Parameter	Default Value	Description
Close Button LIC	CLOSE_BUTTON	Designates the language independent code used to translate the Close button.
CustomButtonId1	MyApplicationsBtnId	Designates a custom button ID in the HTML template. An interview session can have multiple custom buttons.
CustomButtonInvoke Method1	FrameEventMethod WFMMyApplications	Designates the method to invoke when a citizen clicks a custom button, such as Go to View.
CustomButtonLIC1	VIEW_APPLICATIONS	Designates the language independent code used to translate the custom button.

Table 6. Parameters for Configuring Interview Sessions

Parameter	Default Value	Description
DefaultVisualMode	Tile	Designates the default visual mode for the Oracle Policy Automation (OPA) layout.
EnableVisualMode	TRUE	Designates whether the OPA layout can be rendered in different visual modes, such as tile mode or grid mode.
Is Support Preseed	TRUE	Designates whether the Siebel seed data is needed in OPA when starting an interview session.
IsCloseButtonRequired	TRUE	Designates whether the Close button is required for an interview session. If this parameter is set to TRUE, then configure the Close Button LIC parameter.
IsSaveButtonRequired	TRUE	Designates whether the Save button is required for an interview session. If this parameter is set to TRUE, then configure the Save Button LIC parameter.
IsSnapshotRequired AfterSubmit	TRUE	Designates whether the Save operation is needed when submitting an application.
Preseed Search Spec	"[Contact.Id]= "" + Loginid() + ""	Designates the search specifications needed to get the Siebel data to seed the interview session.
Rulebase	ApplyForBenefits	Designates the rulebase deployment name.
SSO System Name	OPA Interview Service	Designates the system name associated with the symbolic URL that specifies the OPA HUB URL.
Save Button LIC	SAVE_BUTTON	Designates the language independent code used to translate the Save button.
Save Current Screen Data	TRUE	Designates whether the Save operation saves the data in the current screen. By default, OPA saves the data on the previous screen and the screens before the previous screen, and not the data on the current screen.
Secure Connection	FALSE	Designates whether the OPA connection is secure through an authenticated user.
Siebel Login Id	SAMPLE	Designates the Siebel login ID that is mapped to the OPA user name and password in the SSO System Admin List view.
StaticAppletName	OPA Interview Service List Applet	Designates the name of the static applet in the Siebel repository.

Table 6. Parameters for Configuring Interview Sessions

Parameter	Default Value	Description
WorkflowName	OPA Interview Service Main Workflow	Designates the name of the workflow in the Siebel repository.
xmlns:i18n	http://www.w3.org/2005/09/ws-i18n	Used for internalization.
xmlns:wsse	http://docs.oasis-open.org/wss/2004/01/oasis-200401-wsswssecurity-secext-1.0.xsd	Establishes a secure connection.
xmlns:wsu	http://docs.oasis-open.org/wss/2004/01/oasis-200401-wsswssecurity-utility-1.0.xsd	Passes user credentials in the Simple Object Access Protocol (SOAP) header.

Setting Up the Applet for Twitter

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

- 1 "Obtaining a Twitter Widget" on page 46
- 2 "Displaying the Twitter Widget in Siebel eService" on page 48
- 3 "Designating the Height and Width of the Twitter Timeline" on page 49

Obtaining a Twitter Widget

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

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

For more information about configuring Twitter widgets, see the Client Side Options section at

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

To obtain a Twitter widget

- 1 Navigate to
https://twitter.com/settings
- 2 Enter your Twitter user name and password to access the widget page.
- 3 Click the Widgets link in the left pane.
- 4 Click Create New.

You use the Twitter timeline tool to configure the public Twitter widget that appears in a Web site.

- 5 Click the Search tab, and provide values for the following fields to configure the timeline:
 - a **Search Query.** The search word or hashtag that the Twitter timeline shows (for example, #Oracle, #Siebel, #hadoop, and so on).
 - b **Options.** Options about the content in Tweets. These options include the following check boxes:
 - Only show top Tweets
 - Safe search mode (Exclude sensitive content and profanity)
 - Auto-expand photos
 - c **Height.** The height of the Twitter timeline.
 - d **Theme.** The background color (white or black) of the Tweets.
 - e **Link color.** The color for the links that appear in the Tweets.

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

- 6 Click Create Widget.

The following message appears: Your widget has been created.

Below the preview of the timeline, generated code appears. You copy and paste this generated code into an empty div element of a Web template file. For more information, see [“Displaying the Twitter Widget in Siebel eService” on page 48](#).

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

An example of the code around the widget ID follows:

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

where:

twitter-wjs is the widget ID.

You note the widget ID because you will enter this ID into an empty div element of a Web template file. For more information, see [“Displaying the Twitter Widget in Siebel eService” on page 48](#).

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

- c Launch the file in a browser.

Displaying the Twitter Widget in Siebel eService

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

To display the Twitter widget in Siebel eService

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

The file content follows:

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

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

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

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

where:

widget ID is the widget ID that you note in [Step 7](#) of ["Obtaining a Twitter Widget" on page 46](#).

- b After the script tag, copy and paste the generated code that appears when you complete [Step 6](#) of ["Obtaining a Twitter Widget" on page 46](#).
- 3 In Siebel tools, create a new Web template with a name and a filename of Twitter.swt.
- 4 Create an empty form applet with a name of Twitter, and complete the followings steps for this applet:
 - a Set the class name to CSSFrameBase.
 - b In the Base mode of the applet Web template, set the Web template to Twitter.swt.
 - c Add the applet to the view where you want Tweets to appear.

- 5 Compile the changes in the [Step 3](#) and [Step 4](#) into the Siebel Repository File.
- 6 Clear the browser cache, and re-start Siebel eService.

Designating the Height and Width of the Twitter Timeline

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

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

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

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

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

5

Administering Siebel eService

This chapter includes information about administering and setting up the functionality that customers can access on the Siebel eService Web site. It includes the following topics:

- [About Administering Siebel eService on page 51](#)
- [About the Security Framework for Siebel eService on page 51](#)
- [About Email Notifications on page 54](#)
- [Administering Navigation Links on page 54](#)
- [Process of Administering Web Access on page 58](#)
- [Configuring the Applets for Program Information on page 61](#)
- [Process of Setting Up Office Locations on page 62](#)
- [Setting Up Information for Email on page 66](#)
- [Process of Administering Service Requests on page 67](#)
- [Process of Setting Up Email Notifications on page 70](#)

About Administering Siebel eService

After configuring Siebel eService, you perform the procedures in this chapter to set up the functionality that customers can access on the Siebel eService Web site. Unless noted otherwise, you use Siebel Call Center to perform these procedures. After you set up or change information in Siebel Call Center, customers with appropriate access can automatically see the information on the Siebel eService Web site.

About the Security Framework for Siebel eService

To establish a secured application security framework, you determine the application functionality and data content that apply to public access and the application functionality and data content that apply to registered customers. To protect privacy and avoid conflicts, you must authenticate registered customers and control the data and application functionality each authenticated customer can access. For more information, see [“About Authentication for Siebel eService” on page 52](#) and [“Access Control for Siebel eService” on page 53](#).

You typically consider the following issues when you set up a security framework:

- **Anonymous use.** Set up the Siebel eService Web site to allow nonregistered customers limited access.

- **Registration.** Set up a means to allow nonregistered customers to register on the Siebel eService Web site.
- **Authentication.** Set up a means to store and then authenticate the user name and password of the registered customers.
- **Access control.** Set up a means to control customer access to views and data on the Web site.

About Authentication for Siebel eService

The customer management and authentication processes control access for the following customers:

- **Anonymous customers.** Customers who do not register on the Siebel eService Web site can view only certain sections of the Web site, such as the company contact information. These customers can register, create their profiles, and gain access to additional functionality on the Web site. They can also obtain user names and passwords from customer service representatives.
- **Registered customers.** Customers who register on the Siebel eService Web site have their user names and passwords authenticated in subsequent visits. After they log in to the Web site, they have access to views appropriate to the responsibilities that an application administrator assigns to them. For example, they can create service requests.

An application administrator or customer service representative can perform the following tasks for customers:

- Create records for customer profiles.
- Add or change user names and passwords for customer profiles.
- Change information in customer profiles, such as postal addresses, email addresses, and telephone numbers.

A Web-delegated customer administrator is a designated administrator at a customer company in a business-to-business situation. These administrators are assigned a Siebel responsibility that allows them to add or change customer information for the account. This Siebel responsibility gives them access to the Web Channel Users view of the Administration - User screen in Siebel Call Center where they can work with customer information.

User names and passwords are typically stored in an external authentication directory, such as Netscape LDAP Directory Server or Microsoft Active Directory Server. The Siebel security adapter interface and the appropriate LDAP parameter settings support the integration between Siebel eService and an external authentication directory. With this support, the directory authenticates registered customers, and then the customers are authorized to access the Siebel eService Web site. For more information about customer management and authentication support, see *Siebel Security Guide*.

Access Control for Siebel eService

Table 7 shows the mechanisms you can use to control customer access to data.

Table 7. Access Control Mechanisms

Basis of Access	Access Control Mechanism
Application Functionality	Responsibility (Role)
Data Partitions	Organization
Group Membership	Access Community
Ownership	Position

To control user access to data, you perform the following tasks:

- Create customer lists.
- Create access groups.
- Assign the appropriate customer lists to the access groups.
- Create catalogs and the categories for those catalogs.
- Associate the data with the catalog categories.
- Assign access groups to the appropriate categories.

For more information about access control, see *Siebel Security Guide* and *Siebel eSales Administration Guide*.

About Data Privacy for Siebel eService

Data privacy supports communication and data transfer through the Internet. By using the Internet SSL and encryption technology, Siebel applications can support a secured communication protocol. This technology also allows for the necessary protection of your transmitted data from a possible security breach, such as network spoofing. For more information about Internet security for Siebel applications, see *Siebel Security Guide*.

About Email Notifications

Email notifications alert customers about important information. For example, you can send email notification to alert a customer when the status of an open service request changes or when a customer service representative associates a solution with the service request. Also for example, you can escalate a service request that is outstanding for longer than a week by sending an email notification to the manager of a call center.

NOTE: Email notifications are not included in the preconfigured Siebel eService application, but you can implement this feature. For more information, see [“Process of Setting Up Email Notifications” on page 70](#).

You use Siebel Workflow to define the business rules that automate business processes and procedures. Siebel eService provides the following sample workflow policies that send email notifications to customers:

- **eService Activity Policy.** Sends an email when an activity is added to a service request.
- **eService Attachment Policy.** Sends an email when a file attachment is added to a service request.
- **eService Registration Request Policy.** Sends an email containing the user ID and password.
- **eService Service Request Update Policy.** Sends an email when the status of a service request is updated.

You might have to change the workflow policy conditions for your business model. You must also enable Email Manager for these email notifications. For information about Email Manager, see *Siebel Business Process Framework: Workflow Guide*.

Administering Navigation Links

Customers can use navigation links on the Siebel eService Web site to access specific site content, such as service requests, office information, and contact information. A group of navigation links can appear as a carousel on the Siebel eService Web site. Also, a navigation link can designate a gateway to an external Web site. An external Web site might be a social media Web site, such as the Web site for Twitter.

You can configure the navigation links that are available to customers, the images that are associated with these links, the behavior of these links when customers click them, the display names of these links, the locations on the Siebel eService Web site where these links appear, and the display of the number of records in the location to which these links navigate.

To administer navigation links

- 1 Navigate to the Administration - Application screen, then the Navigation Links view.

- In the Navigation Links list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Navigation Link Name	Type the name of the navigation link. This link, but not this link name, appears on the Siebel eService Web site.
Image Source	Type the relative path to the image file for the navigation link on the Web server, or type the path to the external Web site that contains the image file for the navigation link. The Web server must be able to access this file. For example, if you want to type the relative path to the image file in the Images directory, then this field value uses the following format: images/filename (for example, images/LocateOffice.png).
Action	Select the action that occurs when customers click the navigation link. Values for this field follow: <ul style="list-style-type: none"> ■ View Drilldown. For this value, the view that is designated in the View Name field appears when customers click the navigation link. ■ Invoke Task. For this value, the task that is designated in the Task Name field starts when customers click the navigation link. ■ Goto URL. For this value, the external Web site that is designated in the URL field appears when customers click the navigation link. ■ Invoke Business Service. For this value, the business service that is designated in the Business Service Name field is called when customers click the navigation link.
Task Name	Select the name of the task that starts when customers click the navigation link. This field applies only if you select a value of Invoke Task in the Action field.
View Name	Select the name of the view that appears when customers click the navigation link. This field applies only if you select a value of View Drilldown in the Action field.
URL	Type the path for the external Web site that appears when customers click the navigation link. This field applies only if you select a value of Goto URL in the Action field.
Display Name	Type the display name for the navigation link name. This link name appears on the Siebel eService Web site.
Active	Select this check box to show the navigation link on the Siebel eService Web site. Clear this check box to hide the navigation link on the Siebel eService Web site.
Description	Type a description of the navigation link.
Business Service Name	Select the name of the business service that is called when customers click the navigation link. This field applies only if you select a value of Invoke Business Service in the Action field.

Field	Comments
Business Service Method Name	Select the applicable method in the business service. You must select a business service before you can select a method in it.
Max Record Count Displayed	<p>Select a value in this field to display the number of records in the location to which the link navigates. For navigation links that appear in tiles, this record count appears beneath the display name for the navigation link. For navigation links that appear in lists, this record count appears in a field for the records of the list. For information about configuring record counts for navigation links, see <i>Configuring Siebel Open UI</i>.</p> <p>Select this field only if you select a value of View Drilldown in the Action field. Values for this field follow:</p> <ul style="list-style-type: none"> ■ Null. Select this value to not display the record count for the location to which the link navigates. ■ 99. Select this value to display no more than 99 in the record count for the location to which the link navigates. If more than 99 records exist, then the record count appears as 99+. ■ 999. Select this value to display no more than 999 in the record count for the location to which the link navigates. If more than 999 records exist, then the record count appears as 999+. <p>If an error is encountered when displaying the record count, then the value in the Enable Developer Mode system preference in the System Preferences view of the Administration - Application screen determines how the record count appears as follows:</p> <ul style="list-style-type: none"> ■ If this system preference is Y, then: <ul style="list-style-type: none"> ■ For navigation links that appear in tiles, a question mark appears for the record count. You can click this question mark to view the error message. ■ For navigation link that appear in lists, the Record Count field for the link shows the error message. ■ If this system preference is N, then: <ul style="list-style-type: none"> ■ For navigation links that appear in tiles, no record count appears. ■ For navigation link that appear in lists, the Record Count field for the link is blank.
Search Spec	Type an expression to restrict the number of records in the record count that you designate in the Max Record Count Displayed field. When you click the select button for this field, the Expression Designer dialog box appears. In this dialog box, you can construct this expression. For more information, see "Constructing Expressions" on page 57 .

Field	Comments
Business Component	Select the business component for the record count. The business components that are available for selection depend on the value in the View Name field.
Application Name	Select the application in which you want to display the navigation link. For example, select Siebel Citizen Service Portal to display the navigation link only in Siebel Public Sector eService, or select Siebel Service Portal to display the navigation link only in Siebel eService. If you select no value in this field, then the navigation link appears in all applications that include it.

- 3 In the Applets list, add a record for each applet on the Siebel eService Web site in which you want the navigation link to appear.
- 4 If you want to show the display name for the navigation link in a different language, then add a record for the display name in the appropriate language in the Translations list.
- 5 If the method that you select in the Business Service Method field includes input parameters, then add a record for each parameter in the Business Service Parameters list.

Some fields are described in the following table.

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

Constructing Expressions

When you click the select button for the Search Spec field in the Navigation Links view of the Administration - Application screen, the Expression Designer dialog box appears. In this dialog box, you can construct an expression to restrict the number of records in the record count for the location to which to link navigates.

The procedure in this topic shows you have to construct an expression to restrict the record count for the LOCATE OFFICE link to only records with a City field value of San Francisco, but you can use the Expression Designer to construct a variety of other expressions.

To construct an expression

- 1 Navigate to the Administration - Application screen, then the Navigation Links view.

- 2 In the Navigation Links list, query for the record with a Display Name field of LOCATE OFFICE.
Make sure that the Max Record Count Displayed field for the record contains a non-null value and that the Business Component field for the record contains a value. Otherwise, no business component fields are available for selection in [Step 4](#).
- 3 Click the select button in the Search Spec field for this record.
- 4 In the Expression Designer dialog box that appears, complete the following steps:
 - a Select Business Component Fields in the Categories list, All in the SubCategories list, and City in the Elements list.
 - b Click Add Element.
[City] appears in the Expression field.
 - c Click the equal sign (=).
[City]= appears in the Expression field.
 - d Type 'San Francisco' after the equal sign.
[City]='San Francisco' appears in the Expression field.
 - e (Optional) Click Validate to verify that the syntax in the Expression field is correct.
If the syntax contains an error, then the Errors field shows an error message. You must correct this error before you are allowed to save the expression. If the syntax does not contain an error, then the Errors field indicates that no error exists.
 - f Click Save.
The expression that you constructed appears in the Search Spec field for the record.

Process of Administering Web Access

To administer Web access, perform the following tasks:

- 1 ["Activating the Workflow for Email Password Button" on page 59](#)
- 2 ["Registering Customers" on page 59](#)
- 3 ["Reassigning Passwords" on page 60](#)

NOTE: Web access administration in Siebel Call Center is not included in the preconfigured Siebel eService application, but you can implement this feature.

Activating the Workflow for Email Password Button

The Email Password button automatically generates a random password for a customer and sends an email containing that password to the customer. This button functions only if you activate the Contact Password Reset workflow. For more information about workflows, see *Siebel Business Process Framework: Workflow Guide*.

NOTE: In addition to activating the workflow, you must enable the Communications Management component group and create the email profile that is used to send the email.

This task is a step in [“Process of Administering Web Access”](#) on page 58.

To activate the workflow for the Email Password button

- 1 Navigate to the Administration - Business Process screen, Workflow Deployment, and then the Active Processes view.
- 2 In the Active Workflow Processes list, query for the Contact Password Reset workflow.
If the workflow is not returned, then it is not yet activated.
- 3 If the workflow is not yet activated, then complete the following steps:
 - a Scroll up to the Repository Workflow Processes list.
 - b Select the workflow from the list, and click Activate.
- 4 Stop and restart the Siebel Server.

Registering Customers

Customer service representatives can register customers in the Web Access form. For more information about customer administration, see *Siebel eSales Administration Guide*.

When customers perform self registration, they can select a user name, a password, and a challenge question. The challenge question confirms the customer's identity when the customer forgets a password.

This task is a step in [“Process of Administering Web Access”](#) on page 58.

To register a customer

- 1 Navigate to the Contacts screen, then the Contacts List view.
- 2 In the Contacts list, add a record, and complete the necessary fields.
- 3 Drill down on the Last Name field for the customer record.
- 4 Navigate to the Web Access view.

- 5 In the Web Access form, complete the necessary fields.

Some fields are described in the following table.

Field	Comments
User ID	Type the ID for the customer.
Responsibility	Select a value of Web Registered User. Responsibilities determine the views that a customer is allowed to access. Application administrators determine the available values in this field. For these values, the Web Access field is selected in the Responsibilities view of the Administration - Application screen. For more information, see <i>Siebel Security Guide</i> .
User Type	Select a value of Web Registered User.
Challenge Question	Type a question for which only the customer knows the answer.
Answer to Challenge Question	Type the answer to the challenge question.

- 6 To automatically generate a random password and send an email containing that password to the customer, click Email Password.

You do not see random passwords that are automatically generated. For more information, see ["Activating the Workflow for Email Password Button" on page 59](#).

Reassigning Passwords

When customers forget their passwords, customer service representatives can use the Web Access form to verify their identities and reassign new passwords. They can automatically generate a random password and send an email containing that password to the customer.

This task is a step in ["Process of Administering Web Access" on page 58](#).

To reassign a password

- 1 Navigate to the Contacts screen, then the Contacts List view.
- 2 In the Contacts list, drill down on the Last Name field for the customer record.
- 3 Navigate to the Web Access view.
- 4 In the Web Access form, complete the following steps:
 - a If necessary, verify the customer's identity by asking the question in the Challenge Question field.
 - b To automatically generate a random password and send an email containing that password to the customer, click Email Password.

Configuring the Applets for Program Information

Siebel eService is integrated with Oracle Knowledge so that customers can review information about programs on the Siebel eService Web site. This information includes details about programs, frequently asked questions (FAQs) about programs, and news articles about programs. Program information appears in applets on the Siebel eService Web site. Administrators can configure criteria for the information that appears in these applets. For more information, see [“About Configuring Oracle Knowledge for Siebel eService” on page 30](#).

To configure an applet for programs

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

The following table describes some of the fields.

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

Field	Description
Sort By	Select the field value by which records are sorted in the applet.
Type	Select the type of records to include in the applet. Values include: <ul style="list-style-type: none"> ■ common. Records that the user accessed the most often. ■ recent. Records that the user accessed the most recently. ■ popular. Records that all users accessed the most often.

Process of Setting Up Office Locations

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

Customers can perform office location searches by using a city, state, or ZIP code query. In the results of the search, the offices appear in order of proximity, along with relevant information, such as location names, addresses, operating hours, telephone numbers, and distances from a location.

To set up office locations, perform the following tasks:

- 1 "Importing Geocode Data" on page 62
- 2 "Creating Divisions for Office Locations" on page 63
- 3 "Creating Categories for Office Locations" on page 64
- 4 "Creating Office Locations" on page 64
- 5 "Linking Search Results to Map Services" on page 65

Importing Geocode Data

The geocode data includes location references. You can import Geocode data in one of the following ways:

- Using the Import command in Siebel Call Center.
- Using Siebel Enterprise Integration Manager. For information about importing data with Siebel Enterprise Integration Manager, see *Siebel Enterprise Integration Manager Administration Guide*.

The imported geocode data is stored in the (S_ZIPCODE) database table. [Table 8](#) shows the columns in this database table that must have data.

Table 8. Data Model for S_ZIPCODE Table

Column	Description
ZIP Code	Postal code in alphanumeric text.
City	Name of city.

Table 8. Data Model for S_ZIPCODE Table

Column	Description
State	Name of state or province. This field can be blank for certain countries.
Country	Name of the country.
Latitude	Latitude number (0 to plus or minus 90). A plus sign (+) denotes the Northern Hemisphere, and a minus sign (-) denotes the Southern Hemisphere.
Longitude	Longitude number (0 to plus or minus 180). A plus sign (+) denotes the Eastern Hemisphere, and a minus sign (-) denotes the Western Hemisphere).

You can import a maximum of 2,000 geocode data records for each Import command on Siebel Call Center. You must store the geocode data in a file that contains the column heading information in [Table 8](#).

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

This task is a step in [“Process of Setting Up Office Locations” on page 62](#).

To import geocode data with the Import command

- 1 Navigate to the Administration - Data screen, then the ZIP Code Administration view.
- 2 In the ZIP Geocodes list, click the cogwheel icon, and then select Import.
The Import dialog box appears.
- 3 In the Import dialog box, complete the following steps:
 - a Click Choose File to select a file in the Input File field.
This file is the geocode data file.
 - b For the Input Format field, select Comma Separated Text File or Tab Delimited Text File for the geocode data file.
 - c For the Input Source field, select Auto Mapping.
 - d For the Conflict Resolution field, select Overwrite Existing Record.
 - e Click Next.
- 4 Make sure the values for the import fields match the values for the Siebel fields, and click Next.
A view log appears when the import process is complete.

Creating Divisions for Office Locations

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

This task is a step in [“Process of Setting Up Office Locations” on page 62](#).

To create a division for an office location

- 1 Navigate to the Administration - Group screen, then the Internal Divisions view.
- 2 In the Divisions list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Organization Flag	Select this check box if the division is associated with an organization.
Partner Flag	Displays a check in the check box if the organization is a channel partner. You select the check box in the Partner Flag field for the organization in the Organizations view of the Administration - Group screen to indicate that the organization is a channel partner.

Creating Categories for Office Locations

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

This task is a step in ["Process of Setting Up Office Locations"](#) on page 62.

To create a category for an office location

- 1 Navigate to the Administration - Data screen, then the List of Values view.
- 2 In the List of Values list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Type	Select a value of BUSINESS_CATEGORY. This field designates the category type for the office locations.
Displayed Value	Type the name of category value that the customers see.
Language Independent Code	Type the language independent field value that is used to search for the category. For example, in the Spanish version of Siebel eService, you might see Oficinas de Ventas for the Displayed Value field, but the Language Independent Code value is Sales Offices.

Creating Office Locations

You can create searchable office locations.

This task is a step in ["Process of Setting Up Office Locations"](#) on page 62.

To create an office location

- 1 Navigate to the Administration - Application screen, then the Branch Locator view.
- 2 In the Branch Locations list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Branch	Type the name that you want the customer to see in the results view.
Category	Select the category for the office location. For more information, see “Creating Categories for Office Locations” on page 64 .
Longitude	Type the longitude for the office. If you do not enter a value, then the longitude value from the S_ZIPCODE table for the value in the ZIP Code field is used.
Latitude	Type the latitude for the office. If you do not enter a value, then the latitude value from the S_ZIPCODE table for the value in the ZIP Code field is used.
Division	Select an existing internal division or channel partner. For more information, see “Creating Divisions for Office Locations” on page 63 .
Address	Select the address for the office.

Linking Search Results to Map Services

In the preconfigured Siebel eService application, search results for office locations are not linked to map services. Application administrators can link search results for office locations to map services so that customers can view applicable directions and a map from an online map service provider. Some map service providers follow:

- **Google Maps™**. You can link to the map service in Google Maps. You must comply with the terms of the service agreement when using the services of Google Maps.
- **MapQuest®**. LinkFree is a free service of MapQuest that allows you to link directly to the MapQuest Web site so that customers can view maps for any address. The Mapquest map service page is automatically loaded for office locations. Customers must submit a brief registration form to Mapquest to make the link available on their Web sites. For information about legal terms, contact Mapquest.
- **Yahoo!®** You can link to the directions and map service in Yahoo! You must comply with the terms of the service agreement when using the services of Yahoo!

To link search results for office locations to a map service provider, you must change the user property values in the Service Provider Search Engine business service in Siebel Tools. The URL address format and variable values depend on the URL call of the service provider. Review the latest URL syntax of the map provider. For information about Siebel Tools, see *Using Siebel Tools*.

This task is a step in [“Process of Setting Up Office Locations” on page 62](#).

Setting Up Information for Email

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

You must enable the Communications Management component group to process inbound email. This component group is started with the Siebel Server process to process inbound email. You can verify a successful email submission in Siebel Call Center by checking the logged event for this task in the Administration - Server Management screen. For more information, see *Siebel CTI Administration Guide*.

Siebel Communications Server processes inbound and outbound communication messages for the Siebel application. Siebel eService uses Siebel Communications Server to process the inbound structured email forms that customers submit. For more information, see *Siebel CTI Administration Guide*.

To set up information for email

- 1 Navigate to the Administration - Application screen, then the Contact Us view.
- 2 In the Email, Fax and Mail Accounts list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Account	Type the name of the account. Customers see this name in the drop-down list for the To field of the email form in the Contact Us view of the Siebel eService Web site when both of the following conditions are met: <ul style="list-style-type: none"> ■ The customers are associated with the organization for the account. ■ The account has an email address.
Account Type	Displays a value of Contact Us.
Address	Select the address for the account. When you click the select button for this field, the Company Addresses dialog box appears. You can select multiple addresses, but only one address can be the primary address for the account. In the dialog box, you can also create a new address record. <p>When you select or create an address record, the other fields in the Email, Fax and Mail Accounts list are populated with the data from that record. If an existing record in the Company Addresses dialog box has no values or incorrect values in the fields for the email address, telephone number, or fax number, then you can change the values for these fields in the dialog box.</p>
Email	Displays the email address for the address that you select or create in the Company Address dialog box.

Field	Comments
Phone #	Displays the telephone number for the address that you select or create in the Company Addresses dialog box.
Fax #	Displays the fax number for the address that you select or create in the Company Addresses dialog box.

- 3 Navigate to the Email Subjects view.
- 4 Add an email subject record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Name	Type a name for the subject record.
Subject	Type the text for the subject record. Enter at least one subject for each account with an email address. You can create multiple subjects for an account with an email address.

Process of Administering Service Requests

To administer service requests, perform the following tasks:

- 1 [“Adding Updates to Service Requests” on page 67](#)
- 2 [“Creating Solutions” on page 68](#)
- 3 [“Associating Solutions with Service Requests” on page 69](#)
- 4 [“Associating Attachments with Service Requests” on page 69](#)

Adding Updates to Service Requests

Customer service representatives might want to add an update to a service request to ask the customer for more information about the issue or to notify the customer that they are currently investigating the issue. To add an update to a service request, you associate with the service request an activity that describes the nature of the update. Customers who can access that service request can view the activity record under the Updates heading of the service request on the Siebel eService Web site.

This task is a step in [Process of Administering Service Requests on page 67](#).

To add an update to a service request

- 1 Navigate to the Service Requests screen, then the Service Request List view.

- 2 In the Service Requests list, drill down on the SR number (#) field for the service request to which you want to add an update.
- 3 Navigate to the Activities view.
- 4 In the Activities list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Description	Type the description of the update to the service request.
Type	Select a value to categorize the nature of the update. Applicable values include Information Needed and Web Update.
Start	Displays the starting date and time for the activity. This field does not affect the update to the service request on the Siebel eService Web site.
Due	Displays the ending date and time for the activity. This field does not affect the update to the service request on the Siebel eService Web site.
Status	Displays the status of the activity. This field does not affect the update to the service request on the Siebel eService Web site.

Creating Solutions

Before you can associate solutions with service requests, you must create the solution records.

This task is a step in [Process of Administering Service Requests on page 67](#).

To create a solution

- 1 Navigate to the Administration - Solution screen, then the Solutions view.
- 2 In the Solutions list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Name	Type the name of the solution. The customer does not see this name.
Description	Type the description of the solution. This field has a text limit of 2 kilobytes.
Status	Select a value for the status of the solution.
Type	Select a value of Solution in this field.
Publish Internal	Select this check box to designate that people within your company can view the solution.
Publish External	Select this check box to designate that people who access the Siebel eService Web site can view the solution.

Associating Solutions with Service Requests

When you associate solutions with service requests, customers who can access those service requests can view the solution records under the Solutions heading of the service requests on the Siebel eService Web site.

This task is a step in [Process of Administering Service Requests on page 67](#).

To associate a solution with a service request

- 1 Navigate to the Service Requests screen, then the Service Request List view.
- 2 In the Service Requests list, drill down on the SR number (#) field for the service request to associate with a solution.
- 3 Navigate to the Solutions view.
- 4 In the Solutions list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Name	Displays the name of the solution that you select in the Add Solutions dialog box.
Description	Displays the description for the solution that you select in the Add Solutions dialog box.
Comments	Type additional comments relevant to the solution.

Associating Attachments with Service Requests

When you associate attachments with service requests, customers who can access those service requests can view the attachments under the Attachments heading of the service requests on the Siebel eService Web site.

This task is a step in [Process of Administering Service Requests on page 67](#).

To associate an attachment with a service request

- 1 Navigate to the Service Requests screen, then the Service Request List view.
- 2 In the Service Requests list, drill down on the SR number (#) field for the service request to associate with an attachment.
- 3 Navigate to the Attachments view.
- 4 In the Attachments list, add a record as follows:
 - a To add a file, click New File, and navigate to and select a file in the dialog box that appears.
 - b To add a URL, click New URL, and designate the URL in the dialog box that appears.

- 5 Complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Attachment Name	Displays the name of the file that you select or the URL that you designate. You can select a different file or URL in the Add Attachment dialog box for this field. Files can be HTML files, PDF files, executable files, and dynamic link library files.
Comments	Type additional comments relevant to the attachment.

Process of Setting Up Email Notifications

To set up email notifications, perform the following tasks:

- 1 [“Enabling Component Groups and Policies for Email Notifications” on page 70](#)
- 2 [“Designating Customers for Email Notifications” on page 71](#)
- 3 [“Changing Parameters for Generate Triggers Component” on page 71](#)
- 4 [“Starting the Task for Generate Triggers Component” on page 72](#)
- 5 [“Changing Parameters for Workflow Monitor Agent Component” on page 72](#)
- 6 [“Starting the Task for Workflow Monitor Agent Component” on page 73](#)

Enabling Component Groups and Policies for Email Notifications

To set up email notifications, you first enable the component groups and policies for email notifications.

This task is a step in [“Process of Setting Up Email Notifications” on page 70](#).

To enable the component groups and policies for email notifications

- 1 Navigate to the Administration - Server Configuration screen, then the Enterprises view, and complete the following steps:
 - a Navigate to the Component Groups view.
 - b In the Component Groups list, make sure the following component groups are enabled:
 - Communications Management
 - Workflow Management

- c Stop and restart the Siebel Server.

Siebel Workflow Manager now actively monitors the workflow policies that are online and performs the appropriate actions. Siebel Communication Manager, which interfaces with the SMTP mail server, executes the actual step for sending the email notification.

- 2 Navigate to the Administration - Business Process screen, then the Workflow Policy Group view, and complete the following steps:
 - a In the Policy Groups list, select the eService Group record.
 - b In the Policies list, verify the following information for each record:
 - ❑ The Activation field that is blank or contains a value that is not later than the date and time of testing.
 - ❑ The Expiration field that is blank or contains a date and time that has not already passed.

Designating Customers for Email Notifications

After you enable the component groups and policies, you designate the customers who receive email notifications.

This task is a step in [“Process of Setting Up Email Notifications” on page 70](#).

To designate a customer for email notifications

- 1 Navigate to the Contacts screen, then the Contacts List view.
- 2 For the customer record, make sure the value in the Email field is the correct email address for the customer.
- 3 Drill down on the Last Name field for the customer record.
- 4 Navigate to the More Info view.
- 5 Select the Send Email Updates check box in the form.

Changing Parameters for Generate Triggers Component

The Generate Triggers component creates triggers for the email notifications. You must change the parameters for this component.

This task is a step in [“Process of Setting Up Email Notifications” on page 70](#).

To change the parameters the Generate Triggers component

- 1 Navigate to the Administration - Server Configuration screen, Servers, and then the Components view.
- 2 In the Components list, find and select the Generate Triggers component.
- 3 Navigate to the Component Parameters view.

- 4 In the Component Parameters list, change the EXEC parameter value to TRUE.

Starting the Task for Generate Triggers Component

After you change the parameters for the Generate Triggers component, you log into Server Manager and start the task for this component. Wait until this task is complete before changing the parameters for the Workflow Monitor Agent component.

This task is a step in ["Process of Setting Up Email Notifications" on page 70](#).

To start the task for the Generate Triggers component

- 1 From the command prompt, log in to Server Manager as follows:

```
srvrmgr /e enterprise name /g gateway server name /u database user name /p db passwd
```

- 2 Start the task for the Generate Triggers component by using the following command:

```
srvrmgr> start task for comp GenTrig with Exec="TRUE", pri vuser="Tableowner_name",  
pri vuserpass="Table_password"
```

where:

- *Tableowner_name* is the database table owner name.
- *Table_password* is the database table password.

For more information, see *Siebel Business Process Framework: Workflow Guide*.

- 3 In Server Manager, type the following text:

```
srvrmgr> list task for comp GenTrig
```

Changing Parameters for Workflow Monitor Agent Component

You must change the parameters for the Workflow Monitor Agent component.

This task is a step in ["Process of Setting Up Email Notifications" on page 70](#).

To change the parameters for the Workflow Monitor Agent component

- 1 Navigate to the Administration - Server Configuration screen, Servers, and then the Components view.
- 2 In the Components list, find and select the Workflow Monitor Agent component.
- 3 Navigate to the Component Parameters view.
- 4 In the Component Parameters list, change the following parameter values:
 - Action interval to 1

- Group Name to eService Group
- Use Action Agent to FALSE

Starting the Task for Workflow Monitor Agent Component

After you change the parameters for the Workflow Monitor Agent component, you log into Server Manager and start the task for this component.

If you want to designate additional email customers for email notifications after you complete all of the steps for setting up email notifications, then you do not have to start the task for the Generate Triggers component or the task for the Workflow Monitor Agent component. You can designate the customers. For more information, see [“Designating Customers for Email Notifications” on page 71](#).

This task is a step in [“Process of Setting Up Email Notifications” on page 70](#).

To start the task for the Workflow Monitor Agent component

- 1 From the command prompt, log in to Server Manager as follows:

```
srvrmgr /e enterprise name /g gateway server name /u database user name /p db passwd
```

- 2 Start the task for the Workflow Monitor Agent component by using the following command for the DB2UDB database:

```
srvrmgr> start task for comp WorkMon with tableownpass='db2'
```

For Oracle, use tableownpass=' *table owner's name*'. For MS Sql, use tableownpass='MSSQL'.

- 3 In Server Manager, type the following text:

```
srvrmgr> list task for comp WorkMon
```

- 4 Log out of Server Manager.

6

Using Siebel eService

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

- [Managing User Profiles on the Siebel eService Web Site on page 75](#)
- [Accessing the Siebel eService Web Site on page 76](#)
- [Obtaining Program Information on the Siebel eService Web Site on page 78](#)
- [Contacting the Web Site Host on page 80](#)
- [Accessing Twitter on the Siebel eService Web Site on page 82](#)
- [Managing Service Requests on the Siebel eService Web Site on page 82](#)

Managing User Profiles on the Siebel eService Web Site

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

- [“Registering on the Siebel eService Web Site” on page 75](#)
- [“Updating User Profiles” on page 76](#)

Registering on the Siebel eService Web Site

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

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

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

To register on the Siebel eService Web site

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

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

- 4 Click Register.

The home page appears again.

Updating User Profiles

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

To update a user profile

- 1 Click the Side Menu icon on any page, and select My Profile.
Alternatively, you can click the UPDATE PROFILE link on the home page.
The User Profile view appears.
- 2 Click the pencil icon.
- 3 Change the appropriate fields in the form as necessary, and click Submit.
If you do not want to update your profile, then click the back arrow icon.
The User Profile view appears again.
- 4 Click Change Password.
- 5 Enter data in the appropriate fields in the form, and click Save.
If you do not want to update your password, then click Cancel.
The User Profile view appears again.

Accessing the Siebel eService Web Site

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

- [“Logging In to the Siebel eService Web Site” on page 77](#)
- [“Obtaining a New Password” on page 77](#)

Logging In to the Siebel eService Web Site

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

To log in to the Siebel eService Web site

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

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

- 3 Click Log In.

The home page appears again.

Logging Out of the Siebel eService Web Site

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

To log out of the Siebel eService Web site

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

The home page appears.

Obtaining a New Password

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

To obtain a new password

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

The Challenge Question form appears.

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

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

- 4 Note your temporary password, and click Close.

The home page appears again.

Obtaining Program Information on the Siebel eService Web Site

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

- [“Searching the Knowledge Database for Program Information” on page 78](#)
- [“Reviewing Program Information” on page 79](#)
- [“Reviewing News Articles” on page 79](#)

Searching the Knowledge Database for Program Information

Customers can search the knowledge database for information about all programs. The knowledge database includes information about programs, news articles about programs, and frequently asked questions (FAQs) about programs. If customers want to search the knowledge database for information about a specific program, then they can review program information. For more information, see [“Reviewing Program Information” on page 79](#).

To search the knowledge database for program information

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

A search view appears.

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

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

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

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

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

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

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

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

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

Reviewing Program Information

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

To review program information

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

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

For more information about finding programs in the search view that appears, see [“Searching the Knowledge Database for Program Information” on page 78](#).

Reviewing News Articles

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

To review news articles

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

- If the news article that you want to view appears in the applet, then click the link for the article to view information about the article.
A dialog box showing details about the news article appears. You can close the dialog box after you review its contents.
- If the news article that you want to view does not appear in the applet, then click View More to find the article in the search view that appears.
For more information about finding articles in the search view that appears, see [“Searching the Knowledge Database for Program Information” on page 78](#).

Contacting the Web Site Host

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

- [“Finding Office Locations of the Web Site Host” on page 80](#)
- [“Sending Email to the Web Site Host” on page 81](#)

Finding Office Locations of the Web Site Host

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

To find office locations of the Web site host

- 1 Click the Side Menu icon on any page, and select Locate Office.
Alternatively, you can click the LOCATE OFFICE link on the home page.
The Locate Office view appears.
- 2 Complete the appropriate fields in the form.
You do not have to enter values in all form fields.
Some fields are described in the following table.

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

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

3 Click Submit.

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

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

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

Sending Email to the Web Site Host

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

To send an email to the Web site host

1 Click the Side Menu icon on any page, and select Contact Us.

Alternatively, you can click the CONTACT US link on the home page.

The Contact Us view appears.

2 Complete the fields in the email form.

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

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

A message appears to indicate that the email was sent.

4 Click OK.

The home page appears.

Accessing Twitter on the Siebel eService Web Site

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

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

Developers can use client-side configuration that Twitter provides to hide the hashtag link and the Twitter icon at the top of the Twitter applet. For information about setting up the Twitter applet on the Siebel eService Web site, see [“Setting Up the Applet for Twitter” on page 46](#).

To access Twitter on the Siebel eService Web site

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

Managing Service Requests on the Siebel eService Web Site

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

- [“Submitting Service Requests” on page 83](#)
- [“Adding Attachments to Service Requests” on page 83](#)
- [“Adding Updates to Service Requests” on page 84](#)
- [“Viewing Solutions for Service Requests” on page 85](#)

Submitting Service Requests

Customers can submit service requests about issues that they encounter.

To submit a service request

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

Adding Attachments to Service Requests

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

To add an attachment to a service request

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

- a In the Attachments applet, click Add File.
A dialog box appears.
 - b Locate and select the file that you want to add to the service request, and then click Open.
The dialog box closes, and the file record appears in the Attachments applet.
 - c (Optional) Enter a description of the attachment in the Comments field.
After the attachment is saved, you cannot change or delete it.
- 5 To add a URL attachment, complete the following steps:
- a In the Attachments applet, click Add URL.
The Add URL dialog box appears.
 - b Enter the URL in the URL field, or copy and paste the URL from a Web page into the URL field, and then click Add.
The Add URL dialog box closes, and the URL record appears in the Attachments applet. You can click the hyperlink in the Attachment Name field to access the corresponding Web site.
 - c (Optional) Enter a description of the attachment in the Comments field.
After the attachment is saved, you cannot change or delete it.

Adding Updates to Service Requests

After customers submit service requests, they can add updates to them. However, they cannot change their initial service requests. Also, customer service representatives can use Siebel Call Center to add updates to service requests.

To add an update to a service request

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

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

Viewing Solutions for Service Requests

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

To view the solutions for a service request

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

7

Using Siebel Public Sector eService

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

- [About Siebel Public Sector eService on page 87](#)
- [Determining Benefits Eligibility on Siebel Public Sector eService on page 88](#)
- [Managing Applications on Siebel Public Sector eService on page 89](#)
- [Managing Cases on Siebel Public Sector eService on page 96](#)

About Siebel Public Sector eService

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

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

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

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

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

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

About National Identification Numbers

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

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

About Contacts in Siebel Public Sector

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

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

Determining Benefits Eligibility on Siebel Public Sector eService

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

Before they apply for benefits, citizens can supply some preliminary information about themselves to determine the benefits that might apply to them. They can complete this screening task as many times as they like, and change the information that they supply to determine if their changes affect the benefits that apply to them. They cannot determine the specifics of their actual benefits until after they apply for those benefits. For more information, see ["Applying for Benefits" on page 89](#).

To determine benefits eligibility

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

A message with introductory information about screening for services appears.

- 2 After reading the message, click Next.

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

- 3 Complete the appropriate fields in the form, and click Next.

In the applet that appears, the names of the benefit programs that might apply to you appear, and information about the next steps to apply for those programs appears.

- 4 Complete one of the following steps:

- If you want to change the preliminary information that you supplied, click Back and go to [Step 3](#).
- If you do not want to retain the preliminary information that you supplied, click Close.

The home page of the Siebel Public Sector eService Web site appears.

Managing Applications on Siebel Public Sector eService

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

- [“Applying for Benefits” on page 89](#)
- [“Resuming the Submission of Applications” on page 91](#)
- [“Viewing the Status of Submitted Applications” on page 92](#)
- [“Revising Rejected Applications” on page 93](#)
- [“Adding Attachments to Applications” on page 94](#)
- [“Cancelling Applications” on page 95](#)
- [“Deleting Applications” on page 95](#)

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 sample Oracle Policy Automation rulebase that is shipped with the product is meant to only illustrate the capabilities of the integration between Oracle Policy Automation and a self-service Web site for Siebel Public Sector eService.

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

- 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 visual cue near the top each screen graphically depicts your progress in completing the application. Each step of the visual cue with a number and description represents a screen of the interview session. The steps that you have completed are a light blue color, the step for the screen that currently appears is a dark blue color, and the steps that you have not yet completed are a dark gray color. The steps that you cannot access are a black color. You cannot access steps that are inconsistent with the information that you provide. For example, if you indicate that you have no income, then you cannot access the step to provide details about your income.

The circled numbers on the left and right side of the visual cue show the number of steps that do not appear in the visual cue for the current screen of the interview session. You can click these circled numbers to display the hidden steps.

- If you close the interview session before clicking the Save button, then the data that you entered in the interview session is not saved. If you click the Save button 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 On the home page of the Siebel Public Sector eService Web site, click the APPLY FOR BENEFITS link.

The first screen of the Oracle Policy Automation interview session appears. Information from your user profile is automatically populated in some of the fields on this first screen. You enter additional information on each screen of the interview session that applies to you.

- 2 Perform the following actions to navigate in the interview session:
 - To navigate to the next screen, click Next.
 - To navigate to the previous screen, click Back.

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

A record for the saved application appears in the My Applications applet. For more information about completing saved applications, see [“Resuming the Submission of Applications” on page 91](#).

- 3 Perform the following actions to manage records in the interview session, such as records for household members, income, expenses, and assets:
 - Select the display mode of the records as follows:
 - If you want the records to appear in forms, then click Card.
 - If you want the records to appear in a list, then click List.
 - To add a record, click the plus icon, and enter data in the fields of the record that appears.
 - To edit a record, select the record, and change the field data in the record.
 - To delete a record, select the record, and click the trash can icon.

Although the record no longer appears in the user interface after you click the trash can icon, the record is not actually deleted until you navigate to the next screen of the interview session.

- 4 On the last screen of the interview session, complete the following steps:
 - a To review and correct the application information, click Back, click Back again as many times as necessary, and click Next as many times as necessary to return to the last screen of the interview session.
 - b If the application information is correct, click Submit.

After you click Submit, either a confirmation screen appears with a message indicating that the application submission was successful, or an error message appears indicating why the application submission was unsuccessful. You cannot change the application information on a submitted application unless an agent rejects the application. For more information, see [“Revising Rejected Applications” on page 93](#).

- 5 On the confirmation screen, complete one of the following steps:
 - If you want to view a list of your applications, click View Applications.
The My Applications applet appears.
 - If you do not want to view a list of your applications, click Close.
The home page of the Siebel Public Sector eService Web site appears.

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. These applications have a Status field value of Saved.

To resume the submission of an application

- 1 If a record for the application appears in the My Applications applet on the home page of the Siebel Public Sector eService Web site, then click the hyperlink in the Application Id field of the record.

Records for the applications that are most recently created, submitted, and updated appear in the My Applications applet.

- 2 If a record for the application does not appear in the My Applications applet on the home page of the Siebel Public Sector eService Web site, then complete the following steps:
 - a Click the Side Menu icon, and select My Applications.
 - b (Optional) Query to find a specific application.
 - c In the My Applications applet, select the application for which you want to resume submission.
- 3 Click Resume.

The Resume button is disabled if the application has a Status field value of Submitted, Processed, or Cancelled.

The first incomplete screen of the interview session appears for the saved application.

- 4 Enter information on the appropriate screens of the interview session.

For more information about completing the saved application, see [“Applying for Benefits” on page 89](#).

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 96](#).

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 To access the application, complete the following steps:
 - a Click the Side Menu icon, and select My Applications.
 - b (Optional) Query to find a specific application.

- c In the My Applications applet, select the application that you want to view.
- 2 To review the application details, 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.
- 3 Click the hyperlink in the Application Id field for the application, 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 Rejected field value is Incomplete Information. After they revise a rejected application, they can resubmit the application to the agency.

To revise a rejected application

- 1 If a record for the application appears in the My Applications applet on the home page of the Siebel Public Sector eService Web site, then click the hyperlink in the Application Id field of the record.

Records for the applications that are most recently created, submitted, and updated appear in the My Applications applet.

- 2 If a record for the application does not appear in the My Applications applet on the home page of the Siebel Public Sector eService Web site, then complete the following steps:
 - a Click the Side Menu icon, and select My Applications.
 - b (Optional) Query to find a specific application.
 - c In the My Applications applet, select the application that you want to revise.

- 3 Click Resume.

The interview session appears for the rejected application.

- 4 Enter the necessary information in the application.

For more information about completing the rejected application, see ["Applying for Benefits" on page 89](#).

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.

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 97](#).

To add an attachment to an application

- 1 If a record for the application appears in the My Applications applet on the home page of the Siebel Public Sector eService Web site, then click the hyperlink in the Application Id field of the record.

Records for the applications that are most recently created, submitted, and updated appear in the My Applications applet.

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

- a Click the Side Menu icon, and select My Applications.
- b (Optional) Query to find a specific application.
- c In the My Applications applet, click the hyperlink in the Application Id field for the application to which you want to add an attachment.

- 3 Select the display mode of records in the Attachments applet as follows:

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

- 4 If you want to add a file attachment to the application, then complete the following steps:

- a In the Attachments applet, click New File.
A dialog box appears.
- b Locate and select the file that you want to attach to the application, and then click Open.
The dialog box closes, and the file record appears in the Attachments applet.
- c (Optional) Enter a description of the attachment in the Comments field.
After this attachment is saved, you cannot change or delete it.

- 5 If you want to add a URL attachment to the application, then complete the following steps:

- a In the Attachments applet, click New URL.
The Add URL dialog box appears.

- b** Enter the URL in the URL field, or copy and paste the URL from a Web page into the URL field, and then click Add.

The Add URL dialog box closes, and the URL record appears in the Attachments applet. You can click the hyperlink in the Attachment Name field to access the corresponding Web site.
- c** (Optional) Enter a description of the attachment in the Comments field.

After this attachment is saved, you cannot change or delete it.

Canceling 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. 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** If a record for the application appears in the My Applications applet on the home page of the Siebel Public Sector eService Web site, then click the hyperlink in the Application Id field of the record.

Records for the applications that are most recently created, submitted, and updated appear in the My Applications applet.
- 2** If a record for the application does not appear in the My Applications applet on the home page of the Siebel Public Sector eService Web site, then complete the following steps:
 - a** Click the Side Menu icon, and select My Applications.
 - b** (Optional) Query to find a specific application.
 - c** In the My Applications applet, select the application that you want to cancel.
- 3** Click Cancel Application.

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

Deleting Applications

To clear unneeded records from the My Applications applet, 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 If a record for the application appears in the My Applications applet on the home page of the Siebel Public Sector eService Web site, then click the hyperlink in the Application Id field of the record.

Records for the applications that are most recently created, submitted, and updated appear in the My Applications applet.
- 2 If a record for the application does not appear in the My Applications applet on the home page of the Siebel Public Sector eService Web site, then complete the following steps:
 - a Click the Side Menu icon, and select My Applications.
 - b (Optional) Query to find a specific application.
 - c In the My Applications applet, select the application that you want to delete
- 3 Click the trash can icon.

Managing Cases on Siebel Public Sector eService

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

- [“Viewing Cases” on page 96](#)
- [“Updating Cases” on page 97](#)
- [“Requesting Appointments for Cases” on page 99](#)
- [“Viewing the Status of Appointment Requests” on page 100](#)
- [“Requesting Appeals for Cases” on page 101](#)
- [“Viewing the Status of Appeal Requests” on page 101](#)

Viewing Cases

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

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

To view a case

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

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

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

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

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

Updating Cases

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

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

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

To update a case

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

Records for the cases that are most recently created and updated appear in the My Cases applet on the home page.
- 2** If a record for the case does not appear in the My Cases applet on the home page of the Siebel Public Sector eService Web site, then complete the following steps:
 - a** Click the Side Menu icon, and select My Cases.
 - b** (Optional) Query to find a specific case.
 - c** In the My Cases applet, click the hyperlink in the Case Number field for the case that you want to update.
- 3** If you want to add an attachment to the case, then select the display mode of records in the Attachments applet as follows:
 - If you want the attachment records to appear in forms, then click Card.
 - If you want the attachment records to appear in a list, then click List.
- 4** If you want to add a file attachment to the case, then complete the following steps:
 - a** In the Attachments applet, click New File.

A dialog box appears.
 - b** Locate and select the file that you want to attach to the case, and then click Open.

The dialog box closes, and the file record appears in the Attachments applet.
 - c** (Optional) Enter a description of the attachment in the Comments field.

After this attachment is saved, you cannot change or delete it.
- 5** If you want to add a URL attachment to the case, then complete the following steps:
 - a** In the Attachments applet, click New URL.

The Add URL dialog box appears.
 - b** Enter the URL in the URL field, or copy and paste the URL from a Web page into the URL field, and then click Add.

The Add URL dialog box closes, and the URL record appears in the Attachments applet. You can click the hyperlink in the Attachment Name field to access the corresponding Web site.
 - c** (Optional) Enter a description of the attachment in the Comments field.

After this attachment is saved, you cannot change or delete it.
- 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 the plus (+) icon.

To create an activity that is an appointment request, see ["Requesting Appointments for Cases" on page 99](#).

- b** Complete the appropriate fields for the activity, and select Web Update in the Type field.
- c** Click the arrow-pointing-to-a-box icon to save the activity record.

The new activity record is added to the Activities applet. 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** If a record for the case appears in the My Cases applet on the home page of the Siebel Public Sector eService Web site, then click the hyperlink in the Case Number field of the record.

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

- 2** If a record for the case does not appear in the My Cases applet on the home page of the Siebel Public Sector eService Web site, then complete the following steps:
 - a** Click the Side Menu icon, and select My Cases.
 - b** (Optional) Query to find a specific case.
 - c** In the My Cases applet, click the hyperlink in the Case Number field for the case for which you want to request an appointment.

- 3** In the Activities applet, complete the following steps:

- a** Click the plus (+) icon.
- b** Complete the appropriate fields for the activity, and select Appointment in the Type field.
- c** Click the arrow-pointing-to-a-box icon to save the activity record.

The new activity record for the appointment is added to the Activities applet. The Type field value of the activity record is Appointment, and the Status field value of the activity record is Active. You cannot change or delete this activity, but an agent can change (but not delete) this activity in the Siebel Public Sector application.

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

For information about adding a file attachment to a case, see [Step 4 in “Updating Cases” on page 97](#).

Viewing the Status of Appointment Requests

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

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

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

To view the status of an appointment request

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

Requesting Appeals for Cases

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

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

To request an appeal for a case

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

The Appeal Request button is disabled if the Status field value of the case is Inactive or Submitted.
- 3 In the Request Appeal applet, enter the reason for the appeal, and click Submit.

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

Alternatively, you can wait until an agent accepts your appeal request, and then include the document with the new appeal case that the agent creates. For information about adding a file attachment to a case, see [Step 4 in "Updating Cases" on page 97](#).

Viewing the Status of Appeal Requests

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

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

A

Workflows for Siebel eService

This appendix includes information about the workflows for Siebel eService. It includes the following topics:

- [Workflows for Registration on page 103](#)
- [Workflows for Interview Sessions on page 110](#)
- [Workflows for Cases on page 126](#)

NOTE: If you cannot see all of the detail in some of the larger workflow diagrams in this chapter, then you can view these workflows in Siebel Tools to see a clearer image.

Workflows for Registration

This group of workflow controls user registration for Siebel eService. It includes the following workflows:

- [“User Registration Initial Process Workflow” on page 103](#)
- [“User Registration Process OUI Workflow” on page 105](#)
- [“PUB Citizen User Registration Process Workflow” on page 107](#)
- [“User Registration SubProcess OUI Workflow” on page 107](#)
- [“User Registration Forgot Password \(CX eService\) Workflow” on page 109](#)
- [“PUB Citizen User Registration Forgot Password Process Workflow” on page 110](#)

User Registration Initial Process Workflow

This workflow calls other workflows that complete the registration process for a customer. [Figure 1](#) shows this workflow.

A customer calls this workflow by clicking the Create an account link or the Forgot Your Password? link in the Log In applet on the home page of the Siebel eService Web site.

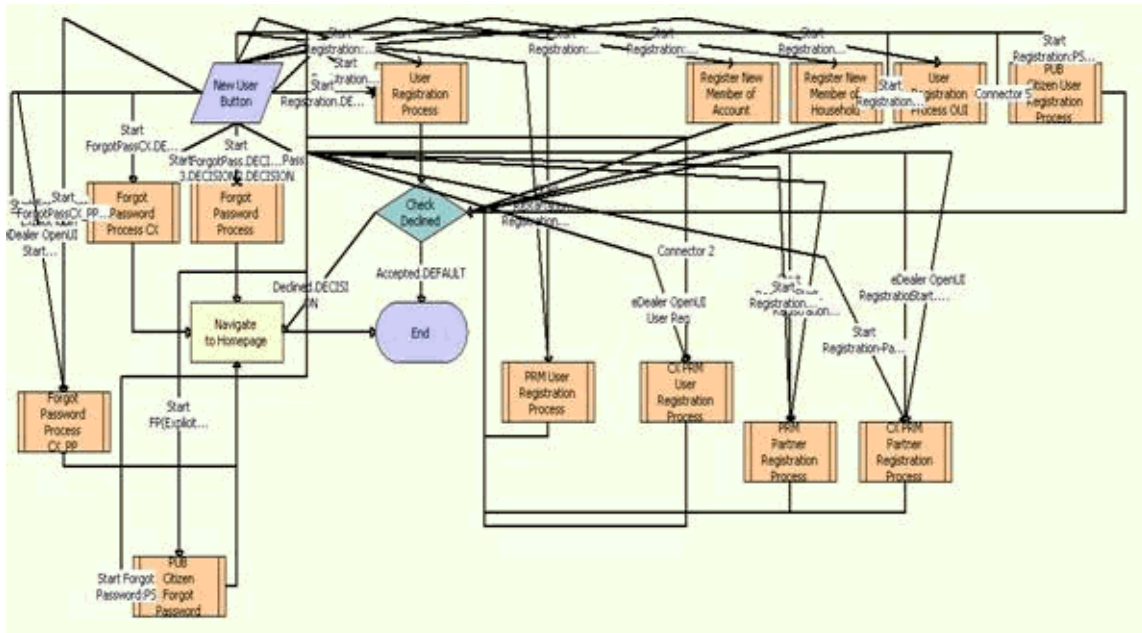


Figure 1. Registration Initial Process Workflow

NOTE: This workflow includes steps that apply to customer registration on Web sites other than the Siebel eService Web site for Siebel Open UI, such as the partner portal Web site. Because this guide documents the functionality for Siebel eService for Siebel Open UI, only the workflow steps that apply to the Siebel eService Web site for Siebel Open UI are included in the workflow description.

Workflow Description. This workflow performs the following actions:

- 1 **User Registration Process OUI.** This step calls the User Registration Process OUI workflow if the customer clicks the Create an account link in the Log In applet of the Siebel eService Web site. For more information, see [“User Registration Process OUI Workflow” on page 105.](#)
- 2 **PUB Citizen User Registration Process.** This step calls the PUB Citizen User Registration Process workflow if the customer clicks the Create an account link in the Log In applet of the Siebel Public Sector eService Web site. For more information, see [“PUB Citizen User Registration Process Workflow” on page 107.](#)
- 3 **Check Declined.** This step determines whether the customer’s registration is accepted or declined during the registration process. If the customer’s registration is accepted, then the workflow terminates.
- 4 **Forgot Password Process CX.** This step calls the User Registration Forgot Password (CX eService) workflow if the customer clicks the Forgot Your Password? link in the Log In applet of the Siebel eService Web site. For more information, see [“PUB Citizen User Registration Forgot Password Process Workflow” on page 110.](#)

- 5 **PUB Citizen Forgot Password.** This step calls the PUB Citizen User Registration Forgot Password Process workflow if the customer clicks the Forgot Your Password? link in the Log In applet of the Siebel Public Sector eService Web site. For more information, see [“User Registration Forgot Password \(CX eService\) Workflow”](#) on page 109.
- 6 **Navigate to Homepage.** This step navigates to the home page of the Siebel eService Web site if the customer’s registration is declined during the registration process or if the customer’s password assignment is complete.

User Registration Process OUI Workflow

This workflow calls another workflow to complete the registration process if the security setup for the customer is valid. [Figure 2](#) shows this workflow.

The User Registration Initial Process workflow calls this workflow as a subprocess.

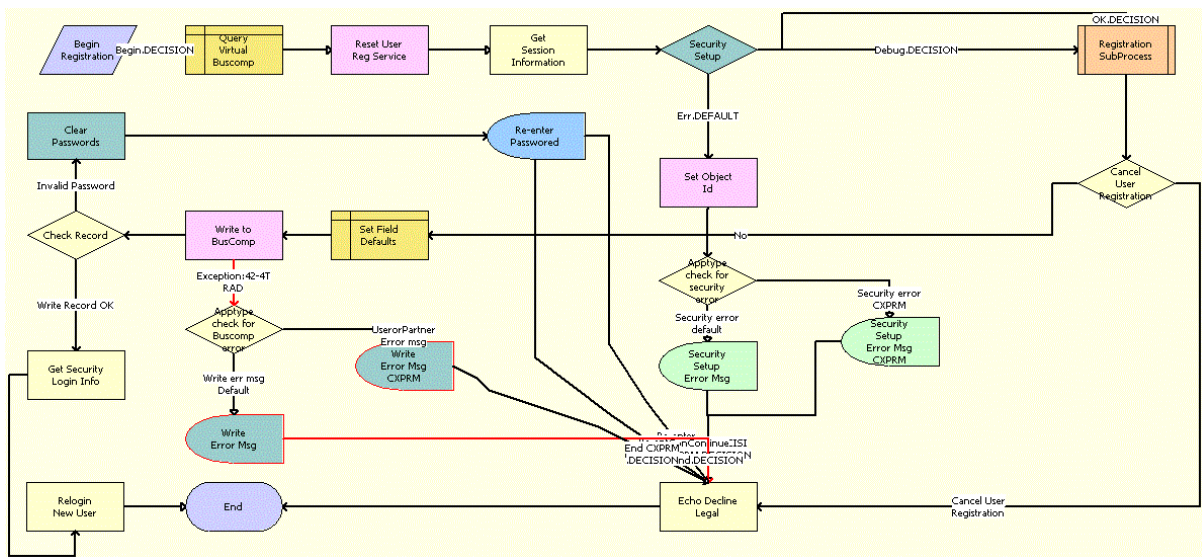


Figure 2. User Registration Process OUI Workflow

NOTE: This workflow includes steps that apply to customer registration on Web sites other than the Siebel eService Web site for Siebel Open UI, such as the partner portal Web site. Because this guide documents the functionality for Siebel eService for Siebel Open UI, only the workflow steps that apply to the Siebel eService Web site for Siebel Open UI are included in the workflow description.

Workflow Description. This workflow performs the following actions:

- 1 **Query Virtual Buscomp.** This step queries the User Registration virtual business component and retrieves the active record.

- 2 Reset User Reg Service.** This step uses a method to prepare the User Registration service and User Registration business component for use. This step works with the User Registration virtual business component to clear all previous data and reset maps for multi-value groups.
- 3 Get Session Information.** This step retrieves the application name and home page view name of the customer's session.
- 4 Security Setup.** This step determines whether the security setup for the customer is valid.
- 5 Set Object Id.** This step sets the object ID if the security setup for the customer is invalid.
- 6 Apptype check for security error.** This step checks for a security error for the type of Web site the customer uses to register.
- 7 Security Setup Error Msg.** This step displays an error message if the security setup for the customer is invalid.
- 8 Registration SubProcess OUI.** This step calls the User Registration SubProcess OUI workflow to complete the registration process if the security setup for the customer is valid. For more information, see "[User Registration SubProcess OUI Workflow](#)" on page 107.
- 9 Cancel User Registration.** This step uses the output from [Step 8](#) to determine whether the registration must be cancelled.
- 10 Echo Decline Legal.** This step sets the value of an output property to indicate that the registration is declined.
- 11 Set Field Defaults.** This step updates the User Registration virtual business component to add a value for the application name.
- 12 Write to BusComp.** This step copies user information from the User Registration virtual business component to the User Registration business component and writes the record.
- 13 Apptype check for Buscomp error.** This step checks for a business component error for the type of Web site the customer uses to register.
- 14 Write Error Msg.** This step displays an error message if [Step 12](#) results in an error.
- 15 Check Record.** This step determines whether the customer registration contains an invalid password
- 16 Clear Passwords.** This step clears the password field if the customer registration contains an invalid password.
- 17 Re-enter Password.** This step displays a message to the customer about entering data in the password field again.
- 18 Get Security Login Info.** This step retrieves the security login information if the customer registration contains a valid password.
- 19 Relogin New User.** This step logs in the customer to the Siebel eService Web site.

PUB Citizen User Registration Process Workflow

This workflow applies to a Siebel Public Sector eService Web site and is identical to the User Registration Process OUI workflow. For more information, see “User Registration Process OUI Workflow” on page 105.

User Registration SubProcess OUI Workflow

The workflow retrieves and validates the registration data of a customer during the registration process. Figure 3 shows this workflow.

The User Registration Process OUI workflow calls this workflow as a subprocess.

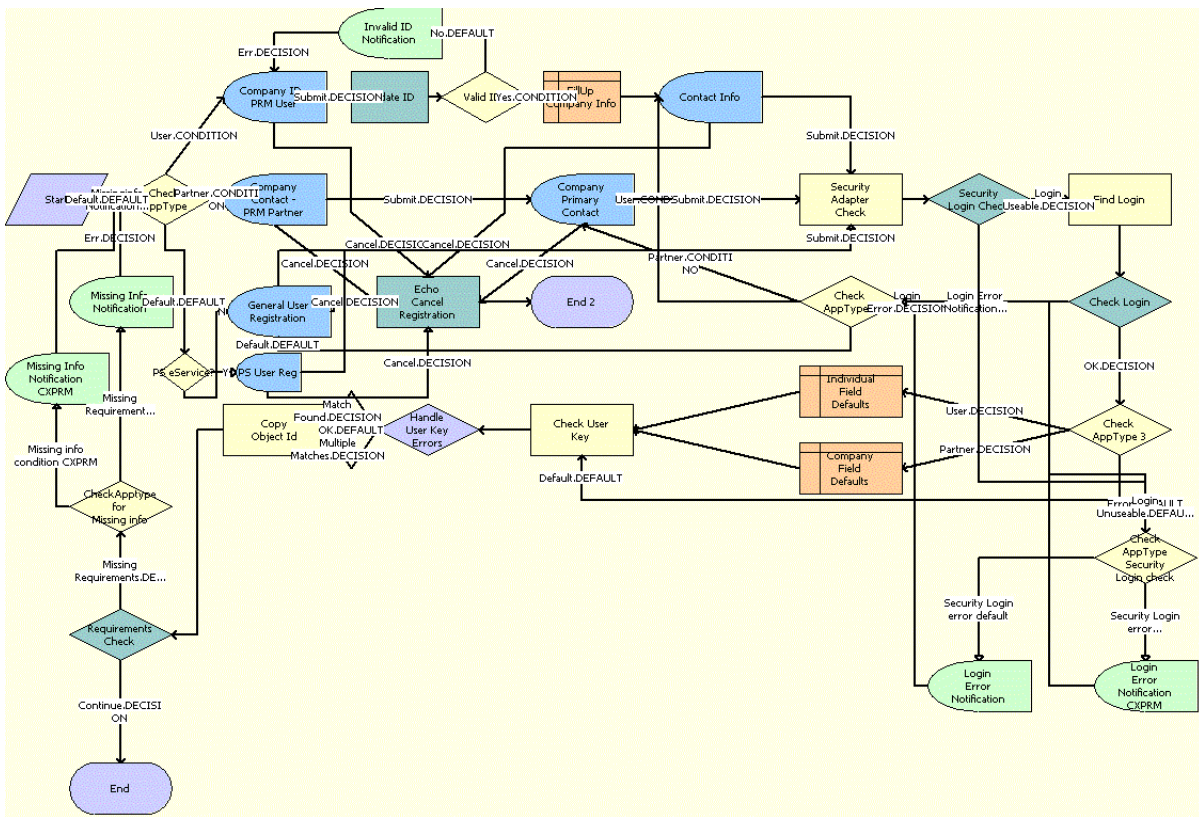


Figure 3. User Registration SubProcess OUI Workflow

NOTE: This workflow includes steps that apply to customer registration on Web sites other than the Siebel eService Web site for Siebel Open UI, such as the partner portal Web site. Because this guide documents the functionality for Siebel eService for Siebel Open UI, only the workflow steps that apply to the Siebel eService Web site for Siebel Open UI are included in the workflow description.

Workflow Description. This workflow performs the following actions:

- 1 **Check AppType.** This step determines the type of Web site the customer uses to register.
- 2 **PS eService?** This step determines whether the type of Web site is the Public Sector eService Web site for Siebel Open UI.
- 3 **General User Registration.** This step displays the appropriate registration form for the customer if the Web site is not the Public Sector eService Web site for Siebel Open UI.
- 4 **Echo Cancel Registration.** This step cancels the registration process when the customer clicks the Cancel button on the registration form.
- 5 **Security Adapter Check.** This step queries the security adapter for the customer's login when the customer clicks the Register button on the registration form.
- 6 **Security Login Check.** This step determines whether the customer's login already exists in the security adapter.
- 7 **Check AppType Security Login check.** This step checks for a security login error for the type of Web site the customer uses to register if the customer login already exists in the security adapter or the Siebel database.
- 8 **Login Error Notification.** This step displays an error message if the security login already exists in the security adapter or the Siebel database.
- 9 **Find Login.** This step queries the Contact table for the customer's login if the customer's login does not already exist in the security adapter.
- 10 **Check Login.** This step determines whether customer's login already exists in the Siebel database.
- 11 **Check AppType 2.** This step determines the type of Web site the customer uses to register so that the appropriate registration form can appear.
- 12 **Check AppType 3.** This step determines the type of Web site the customer uses to register if the customer's login does not already exist in the security adapter or the Siebel database.
- 13 **Check User Key.** This step validates the prospective contact. It checks to determine whether the required fields for the application-specific unique key already exist and returns an error if this key already exists.
- 14 **Handle User Key Errors.** This step determines the type of error that [Step 13](#) returns.
- 15 **Copy Object Id.** This step copies the object ID from one process property to another process property.
- 16 **Requirements Check.** This step determines whether the user key is valid by using the output argument that [Step 13](#) returns.
- 17 **Check Apptype for Missing info.** This step checks for missing information in the registration form for the Web site the customer uses to register.
- 18 **Missing Info Notification.** This step displays an error message if data for the user key is invalid.

User Registration Forgot Password (CX eService) Workflow

This workflow assigns a random password to a customer when the customer forgets a password. Figure 4 shows this workflow.

The User Registration Initial Process workflow calls this workflow as a subprocess when the customer clicks the Forgot Your Password? link in the Log In applet on the home page of the Siebel eService Web site.

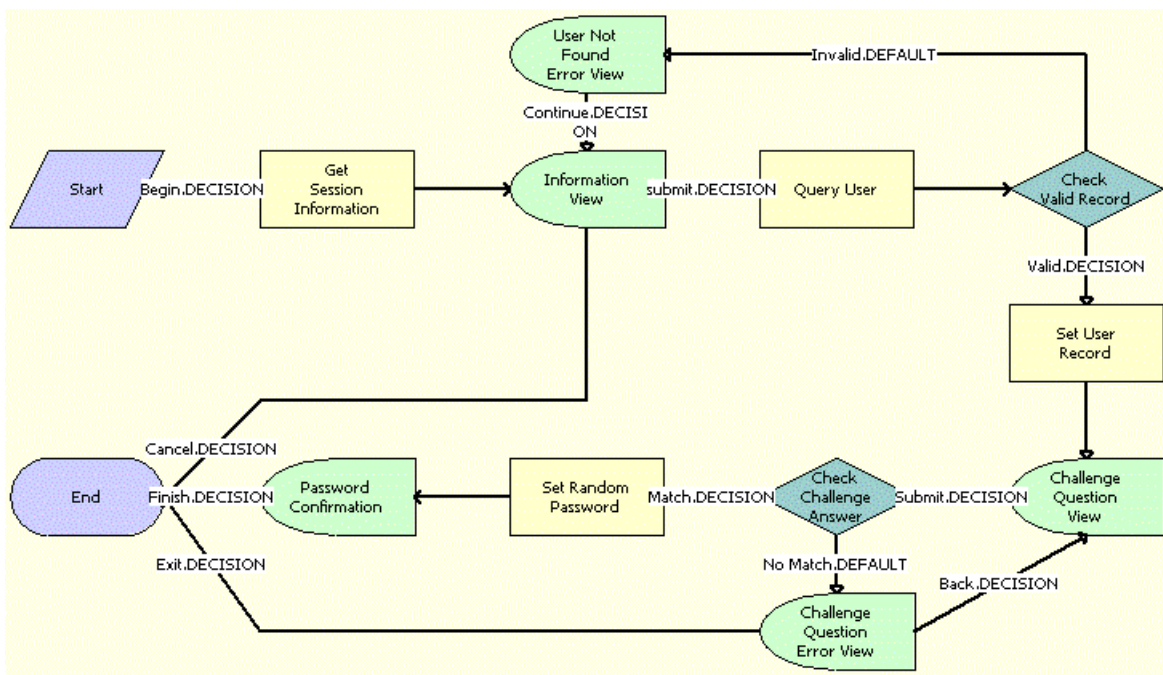


Figure 4. User Registration Forgot Password (CX eService) Workflow

Workflow Description. This workflow performs the following actions:

- 1 Get Session Information.** This step gets information about the customer's session on the Siebel eService Web site.
- 2 Information View.** This step shows the Forgot Password form in which the customer enters contact information.
- 3 Query User.** This step uses the information in the Forgot Password form to find information about the customer after the customer clicks the Submit button on the form.
- 4 Check Valid Record.** This step determines whether a valid contact record for the customer already exists in the Siebel database.
- 5 User Not Found Error View.** This step displays an error message if a valid contact record for the customer does not already exist.

- 6 **Set User Record.** This step accesses the valid contact record for the customer if such a record already exists.
- 7 **Challenge Question View.** This step shows the Challenge Question form in which the customer answers a challenge question that the customer created earlier for identity verification.
- 8 **Check Challenge Answer.** This step uses the information in the Challenge Question form to determine whether the answer to the challenge question is correct after the customer clicks the Submit button on the form.
- 9 **Challenge Question Error View.** This step displays an error message if the answer to the challenge question is incorrect.
- 10 **Set Random Password.** This step generates a random password for the customer if the answer to the challenge question is correct.
- 11 **Password Confirmation.** This step shows the Confirmation form that notifies the customer that an email containing the random password was sent to the customer.

PUB Citizen User Registration Forgot Password Process Workflow

This workflow applies to a Siebel Public Sector eService Web site and is identical to the User Registration Forgot Password Process (CX eService) workflow. For more information, see [“User Registration Forgot Password \(CX eService\) Workflow” on page 109.](#)

Workflows for Interview Sessions

The group of workflows controls processing for interview sessions on a Siebel Public Sector eService Web site. It includes the following workflows:

- [“OPA Integration Workflow” on page 111](#)
- [“OPA Integration Sub Workflow” on page 112](#)
- [“OPA Interview Service Main Workflow” on page 113](#)
- [“OPA Get PreSeed Data Workflow” on page 117](#)
- [“OPA Interview Service Sub Workflow” on page 119](#)
- [“OPA Process Submit Data Workflow” on page 123](#)
- [“OPA End Interview Workflow” on page 123](#)
- [“OPA Get Meta Data Service For PUB Sample Intake Contact Workflow” on page 124](#)
- [“OPA Metadata Service - CheckAlive Workflow” on page 125](#)

OPA Integration Workflow

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

This workflow does not apply to implementations for release Innovation Pack 2015, Patchset 5 or later. For such implementations, the OPA Interview Service Main workflow replaces this workflow. For more information, see [“OPA Interview Service Main Workflow”](#) on page 113.

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

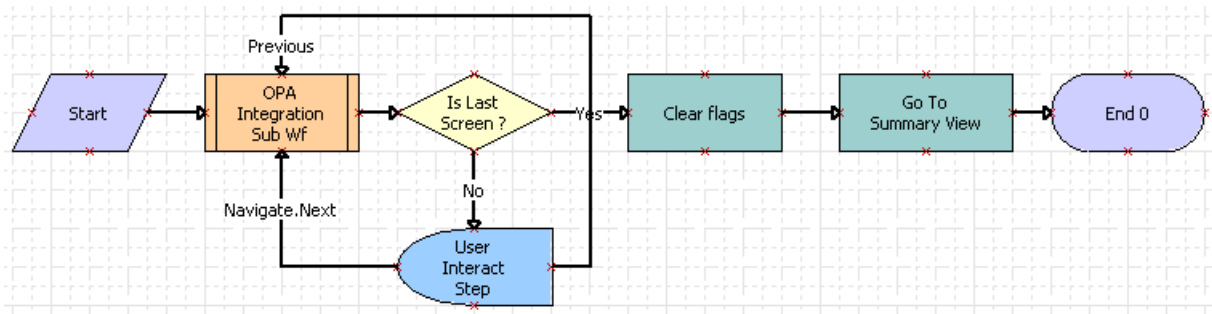


Figure 5. OPA Integration Workflow

Workflow Description. This workflow performs the following actions:

- 1 **OPA Integration Sub Wf.** This step calls the OPA Integration Sub Workflow. For more information, see [“OPA Integration Sub Workflow”](#) on page 112.
- 2 **Is Last Screen?** This step determines whether the screen that currently appears is the last screen of the interview session.
- 3 **User Interact Step.** This step determines the customer action if the screen that currently appears is not the last screen of the interview session. If the customer clicks the Next or Previous button, then the workflow returns to [Step 1](#).

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

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

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

OPA Integration Sub Workflow

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

This workflow does not apply to implementations for release Innovation Pack 2015, Patchset 5 or later. For such implementations, the OPA Interview Service Sub workflow replaces this workflow. For more information, see [“OPA Interview Service Sub Workflow” on page 119](#).

The OPA Integration Workflow calls this workflow as a subprocess.

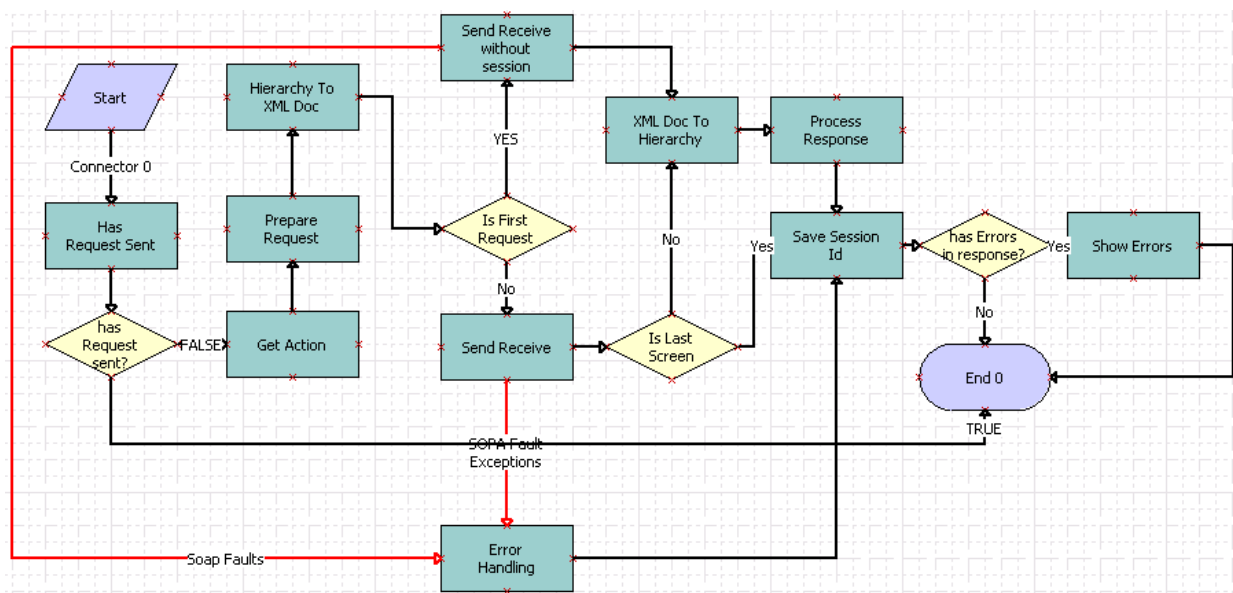


Figure 6. OPA Integration Sub Workflow

Workflow Description. This workflow performs the following actions:

- 1 **Has Request Sent.** This step evaluates whether a request was sent to OPA with the current session ID during the current interview session. This step calls the HasRequestSent method in the OPA Interface Service business service.
- 2 **has Request sent?** This step determines whether a request was sent to OPA with the current session ID during the current interview session. The workflow terminates if TRUE the request was sent.
- 3 **Get Action.** This step evaluates the user action during the interview session and obtains the appropriate action type for that action. Action types include: Start Interview, Investigate, and End Interview. This step calls the Get Action method in the OPA Interface Service business service.
- 4 **Prepare Request.** This step uses the action and the populated user data in the interview session to prepare the request to OPA. This step calls the Prepare Request method in the OPA Interface Service business service.

- 5 **Hierarchy To XML Doc.** This step converts the request from a hierarchy format to an XML format.
- 6 **Is First Request.** This step determines whether the request is the first request by evaluating the sessionId property.
- 7 **Send Receive without session.** This step sends the request without a session ID to OPA if the request is the first request. This method calls the OPA outbound Web service.
- 8 **Error Handling.** This step addresses any Simple Object Access Protocol (SOAP) fault exceptions.
- 9 **Send Receive.** This step sends the request with a session ID to OPA if the request is not the first request. This method calls the OPA outbound Web service.
- 10 **Is Last Screen.** This step determines whether the current screen is the last screen of the interview session by evaluating the Is Last Screen property.
- 11 **XML Doc To Hierarchy.** This step converts the request from XML format to hierarchy format if the current screen is not the last screen of the interview session.
- 12 **Process Response.** This step processes the response from OPA by converting the response to a flat property set and updating the flat property set into the global session. This step calls the ProcessResponse method in the OPA Interface Service business service.
- 13 **Save Session Id.** This step saves the ID of the interview session as a member variable. Subsequent requests use this variable. This step calls the CacheSessionId method in the OPA Interface Service business service.
- 14 **has Errors in response?** This step determines if the OPA response contains validation errors. The workflow terminates if the OPA response does not contain validation errors.
- 15 **Show Errors.** This step shows the error messages during the interview session if the OPA response contains validation errors and SOAP fault exceptions. This step calls the ShowErrors method in the OPA Interface Service business service.

OPA Interview Service Main Workflow

This workflow manages an interview session when customers apply for benefits and screen for services. It drives the interview session by calling other workflows. [Figure 7](#) shows this workflow.

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

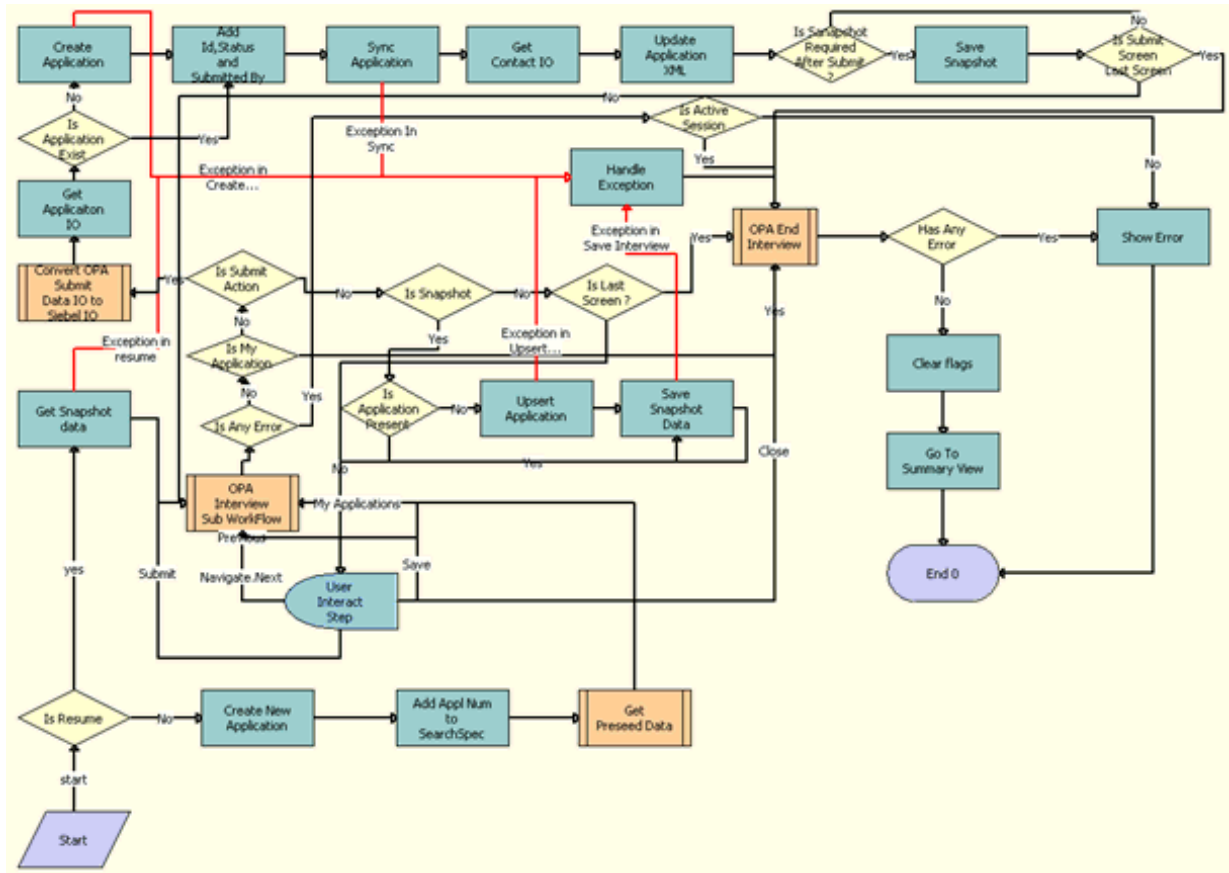


Figure 7. OPA Interview Service Main Workflow

Workflow Description. This workflow performs the following actions:

- 1 **Is Resume.** This step determines whether the action for the interview request applies to resuming an existing interview.
- 2 **Create New Application.** This step calls the UpsertRecord method from the PUB OPA Utilities Service business service. The input arguments to this method are the business component, business object, search spec, input fields, and output fields. This method creates the application record with a Created status, and returns the Id and application number.
- 3 **Add Appl Num to SearchSpec.** This step calls the Eco method from the Workflow Utilities business service to add the application number to a custom search specification.
- 4 **Get Preseed Data.** This step calls the OPA Get PreSeed Data Workflow. For more information, see [“OPA Get PreSeed Data Workflow”](#) on page 117.

- 5 **OPA Interview Sub WorkFlow.** This step calls the OPA Interview Service Sub Workflow. For more information, see [“OPA Interview Service Sub Workflow” on page 119.](#)
- 6 **Get Snapshot data.** This step calls the Upsert Record method from the PUB OPA Utilities Service business service. This method reads the saved interview session with base64 data.
- 7 **User Interact Step.** This step evaluates the user action to render the interview session. The following events are configured in this step:
 - FrameEventMethodWFSave
 - FrameEventMethodWFNavigate
 - FrameEventMethodWFSubmit
 - FrameEventMethodWFMyApplications
 - FrameEventMethodWFClose
- 8 **Is Any Error.** This step determines whether the Oracle Policy Automation (OPA) response contains an error.
- 9 **Is Active Session.** This step determines whether an active interview session exists.
- 10 **Is My Application.** This step determines whether the user clicks the View Applications button in the interview session.
- 11 **Is Submit Action.** This step determines whether the user clicks the Submit button in the interview session.
- 12 **Is Snapshot.** This step determines whether the user clicks the Save button in the interview session.
- 13 **Is Last Screen?** This step determines whether the screen that appears is the last screen of the interview session.
- 14 **Is Application Present.** This step determines whether an application record already exists for the interview session.
- 15 **Upsert Application.** This step calls the UpsertRecord method from the PUB OPA Utilities Service business service. The input arguments to this method are the business component, business object, search spec, input fields, and output fields. This method creates the application record with a Save status, and returns the Id and application number.
- 16 **Handle Exception.** This step calls the ErrorHandling method from the OPA Interview Framework Service business service if errors or Simple Object Access Protocol (SOAP) fault exceptions occur during the OPA outbound proxy call. The input arguments to this method are the fault code and fault string.
- 17 **Save Snapshot Data.** This step calls the UpsertRecord method from the PUB OPA Utilities Service business service. The input arguments to this method are the business component, business object, search spec, input fields, and method. This method creates the interview session record with base64 data.
- 18 **Convert OPA Submit Data IO to Siebel IO.** This step calls the OPA Process Submit Data Workflow. For more information, see [“OPA Process Submit Data Workflow” on page 123.](#)

- 19 Get Application IO.** This step calls the Execute method from the EAI Data Transformation Engine business service. The input argument to this method is the Pub Sample Intake data integration object. This method returns the PUB Intake Application integration object.
- 20 Is Application Exist.** This step determines whether an application record already exists for the interview session.
- 21 Create Application.** This step calls the UpsertRecord method from the PUB OPA Utilities Service business service. The input arguments to this method are the business component, business object, search spec, input fields, and output fields. This method creates the application record with a Save status, and returns the Id and application number.
- 22 Add Id, Status and Submitted By.** This step calls the AddPropertiesToPropertySet method from the OPA Interview Framework Service business service. The input arguments to this method are the ApplicationIntegrationObject (SiebelMessage), application row Id, application status, application submitted by, and PropertySetPath. This method adds the properties to the property set at the property set path, and returns the updated property set as the UpdatedApplicationIntegrationObject (SiebelMessage).
- 23 Sync Application.** This step calls the Synchronization method from the EAI Siebel Adapter business service to update, create, and delete records for applications, benefit plans, line items in benefit plans, and payments.
- 24 Get Contact IO.** This step calls the Execute method from the EAI Data Transformation Engine business service. The input argument to this method is the Pub Sample Intake data integration object. This method returns contact data.
- 25 Update Application XML.** This step calls the UpdateApplicationXML method from the PUB OPA Intake Service business service. The input argument to this method is the Pub Sample Intake data integration object with applicant data. This method converts the integration object to XML format, and updates the application record with the XML data.
- 26 Is Snapshot Required After Submit?** This step determines whether an interview snapshot is required when the application is submitted.
- 27 Save Snapshot.** This step calls the UpsertRecord method from the PUB OPA Utilities Service business service. The input arguments to this method are the business component, business object, search spec, input fields, and method. This method creates the interview session record with base64 data.
- 28 Is Submit Screen Last Screen.** This step determines whether the screen that appears is a last screen of the interview session.
- 29 OPA End Interview.** This step calls the OPA End Interview Workflow. For more information, see [“OPA End Interview Workflow” on page 123](#).
- 30 Has Any Error.** This step whether the OPA response contains an error.
- 31 Show Error.** This step calls the ShowErrors method from the OPA Interview Framework Service business service to show the errors that occurred when sending the request to OPA.
- 32 Clear flags.** This step calls the Clearflags method from the OPA Interview Framework Service business service to clear the flags related to the interview session.

33 Go To Summary View. This step calls the GotoView method from the FINS Teller UI Navigation business service to navigate to the home page or the My Applications applet, depending on the user action.

OPA Get PreSeed Data Workflow

This workflow gets the seed data for an interview session. It gets a list of fields that can be seeded from Oracle Policy Automation (OPA), converts the integration object in OPA format to an integration object in Siebel format, gets the seed data from the Siebel database, and converts the data in Siebel format to data in OPA format. [Figure 8](#) shows this workflow.

The OPA Interview Service Main Workflow calls this workflow as a subprocess.

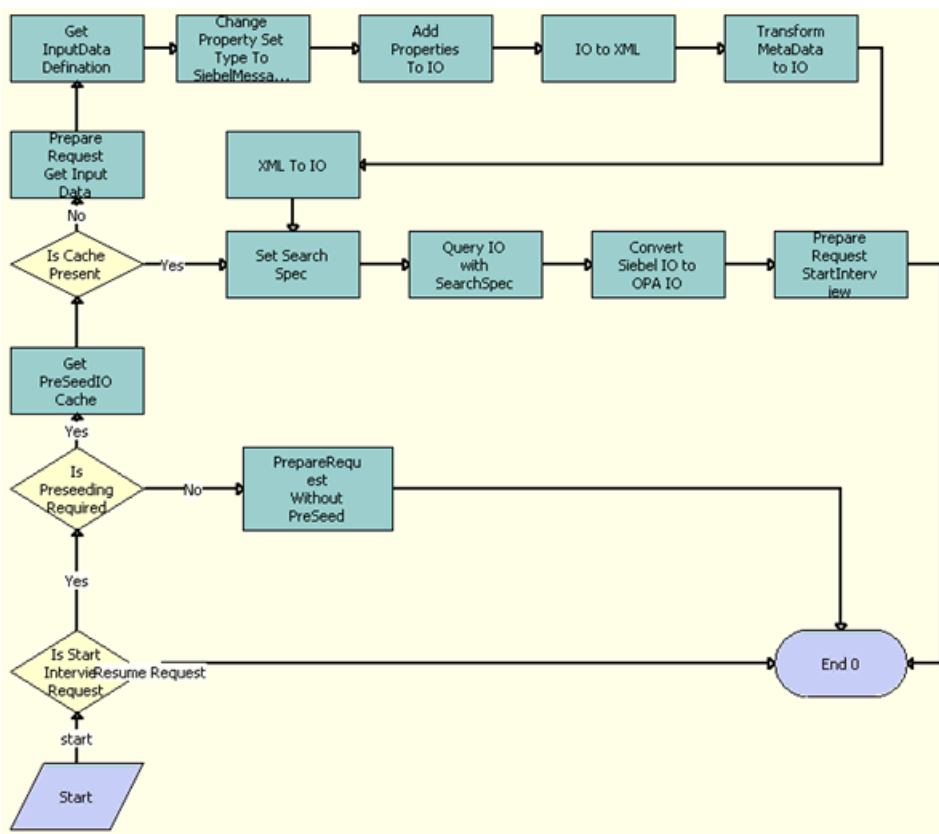


Figure 8. OPA Get PreSeed Data Workflow

Workflow Description. This workflow performs the following actions:

- 1 Is Start Interview Request.** This step determines whether the action for the interview request applies to starting an interview or resuming an existing interview. If the interview request applies to resuming an existing interview, then the workflow terminates.

- 2 **Is Preseeding Required.** This step determines whether seed data is required for the interview request if the interview request applies to starting an interview.
- 3 **PrepareRequest Without PreSeed.** This step calls the PrepareRequestStartInterview method from the OPA Interview Framework Service business service to prepare the interview request without the seed data if seed data is not required for the interview request.
- 4 **Get PreSeedIO Cache.** This step calls the GetCachedIO method from the OPA Interview Framework Service business service to get the seed integration object in the cache if seed data is required for the interview request. The input argument to this method is the rule base name. This method returns a value of true if the seed integration object is available in the cache and a value of false if the seed integration object is not available in the cache.
- 5 **Is Cache Present.** This step determines whether the seed integration object is present in the cache.
- 6 **Prepare Request Get Input Data.** This step calls the PrepareRequestGetSeedData method from the OPA Interview Framework business service to prepare the OPA request for the GetInputDataDefinition action for the Simple Object Access Protocol (SOAP) if the seed integration object is not present in the cache.
- 7 **Get InputData Definition.** This step calls the GetInputDataDefinition method from the odsInterviewService12.2_SiebelOPAIntegration_type outbound OPA business service. The input argument to this method is the InputDataRequest integration object (GetInputDataDefinitionRequest: GetInputDataDefinitionRequest). This method returns the InputData integration object (GetInputDataDefinitionResponse: GetInputDataDefinitionResponse) for a list fields that can be seeded for the interview.
- 8 **Change Property Set Type to SiebelMessage.** This step calls the ChangePropertysetType method from the OPA Interview Framework Service business service. The input arguments to this method are the InputData integration object (GetInputDataDefinitionResponse: GetInputDataDefinitionResponse), PropertySetPath, and PropertySetType. This method changes the property set type for the property set path, and returns the modified property set.
- 9 **Add Properties to IO.** This step calls the AddPropertiesToPropertySet method from the OPA Interview Framework Service business service. The input arguments to this method are the InputData integration object (SiebelMessage), IOName, IOxml tag name, PrimaryIC, PrimaryIC XML tag, and PropertySetPath. This method adds the properties to the property set at the property set path, and returns the updated property set as the UpdatedInputData integration object (SiebelMessage).
- 10 **IO to XML.** This step calls the IntObjHierToXMLDoc method in the EAI XML Converter business service to convert the Siebel Message into XML format.
- 11 **Transform MetaData to IO.** This step calls the Transform method from the EAI XSLT Service business service to convert the get-input-data-definition-response integration object in XML format to the seed integration object in XML format.
- 12 **XML to IO.** This step calls the XMLDocToIntObjHier method from the EAI XML Converter business service to convert the XML data to an integration object.

- 13 Set Search Spec.** This step calls the SetSearchSpecToSiebelMsg method from the OPA Interview Framework Service business service to set the search specification to the integration object. The input argument to this method is the custom search specification.
- 14 Query IO with SearchSpec.** This step calls the QueryPage method from the EAI Siebel Adapter business service to get data by using the query template.
- 15 Convert Siebel IO to OPA IO.** This step calls the ConvertSiebelIntObjToStartInterviewReqIntObj method from the OPA Interview Framework Service business service to convert the integration object for Siebel data to the start-interview-request integration object for OPA.
- 16 Prepare Request StartInterview.** This step calls the Prepare Request method from the OPA Interview Framework Service business service to prepare to start the interview with seed data.

OPA Interview Service Sub Workflow

This workflow manages the communication between an interview session for a customer and Oracle Policy Automation (OPA) by sending requests to OPA and receiving and processing responses from OPA. OPA responses are converted to the Siebel data structure and appear in the user interface for the interview session. [Figure 9](#) shows this workflow.

The OPA Interview Service Main Workflow calls this workflow as a subprocess.

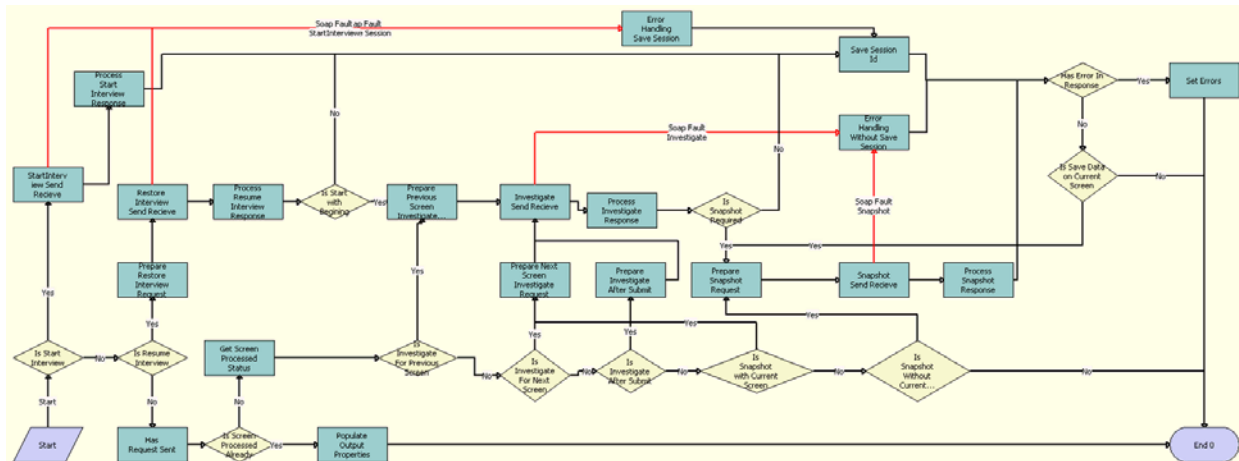


Figure 9. OPA Interview Service Sub Workflow

Workflow Description. This workflow performs the following actions:

- 1 Is Start Interview.** This step determines whether the action for the interview request applies to starting an interview.

- 2 Start Interview Send Receive.** This step calls the StartInterview method from the odsInterviewService12.2_SiebelOPAIntegration_type outbound OPA business service. The input argument to this method is the Start Interview Request integration object (StartInterviewRequest:StartInterviewRequest). This method returns the response integration object (StartInterviewResponse:StartInterviewResponse) for the first screen of the interview.
- 3 Process Start Interview Response.** This step calls the ProcessResponse method from the OPA Interview Framework Service business service. The input argument to this method is the response integration object (StartInterviewResponse:StartInterviewResponse) from the OPA outbound proxy call. This method converts the OPA response into the Siebel hierarchy property set, determines if an error or warning occurs in the OPA response, and displays for the user the error or warning, if any.
- 4 Error Handling Save Session.** This step calls the ErrorHandling method from the OPA Interview Framework Service business service if errors or Simple Object Access Protocol (SOAP) fault exceptions occur during the OPA outbound proxy call. The input arguments to this method are the fault code and fault string.
- 5 Save Session Id.** This step calls the CachSessionId method from the OPA Interview Framework Service. Because the session ID for OPA is required to maintain an active interview with OPA, this step persists this session ID.
- 6 Is Resume Interview.** This step determines whether the action for the interview request applies to resuming an existing interview.
- 7 Prepare Restore Interview Request.** This step calls the Prepare Request method from the OPA Interview Framework Service business service to prepare the Restore Session Request integration object (RestoreSessionRequest:RestoreSessionRequest) to restore the interview session.
- 8 Restore Interview Send Receive.** This step calls the RestoreSession method from the odsInterviewService12.2_SiebelOPAIntegration_type outbound OPA business service. The input argument to this method is the Restore Session Request integration object (RestoreSessionRequest:RestoreSessionRequest). This method returns the response integration object (RestoreSessionResponse:RestoreSessionResponse), which contains the encoded binary data on the screen in which the user last clicked the Save button and the encoded binary data on the screens before that screen.
- 9 Process Resume Interview Response.** This step calls the ProcessResponse method from the OPA Interview Framework Service business service. The input argument to this method is the response integration object (RestoreSessionResponse:RestoreSessionResponse) from the OPA outbound proxy call. This method converts the OPA response into the Siebel hierarchy property set, determines if an error or warning occurs in the OPA response, and displays for the user the error or warning, if any.
- 10 Is Start With Beginning.** This step determines whether to start the interview session from the first screen of the interview session or from the screen that was last saved in the interview session.
- 11 Prepare Previous Screen Investigate Request.** This step calls the PrepareRequestInvestigateWithPrevScreen method from the OPA Interview Framework Service business service. This method prepares the Investigate Request integration object (InvestigateRequest:InvestigateRequest) for the previous screen when the user clicks the Back button.

- 12 Investigate Send Receive.** This step calls the Investigate method from the odsInterviewService12.2_SiebelOPAIntegration_type outbound OPA business service. The input argument to this method is the Investigate Request integration object (InvestigateRequest: InvestigateRequest). This method returns the response integration object (InvestigateResponse: InvestigateResponse), which includes metadata and data for request interview screen.
- 13 Error Handling Without Save Session.** This step calls the ErrorHandling method from the OPA Interview Framework Service business service if errors or Simple Object Access Protocol (SOAP) fault exceptions occur during the OPA outbound proxy call. The input arguments to this method are the fault code and fault string.
- 14 Process Investigate Response.** This step calls the ProcessResponse method from the OPA Interview Framework Service business service. The input argument to this method is the response integration object (InvestigateResponse: InvestigateResponse Investigate) from the OPA outbound proxy call. This method converts the OPA response into the Siebel hierarchy property set, determines if an error or warning occurs in the OPA response, and displays for the user the error or warning, if any.
- 15 Is Snapshot Required.** This step uses the IsSnapshotRequiredAfterSubmit property to determine whether a snapshot of interview is required after the user clicks the Submit button.
- 16 Prepare Snapshot Request.** This step calls the Prepare Request method from the OPA Interview Framework Service business service. This method prepares the Snapshot Session Request integration object (SnapshotSessionRequest: SnapshotSessionRequest) for the snapshot session when the user clicks Save.
- 17 Snapshot Send Receive.** This step calls the SnapshotSession method from the odsInterviewService12.2_SiebelOPAIntegration_type outbound OPA business service. The input argument to this step is the Snapshot Session Request integration object (SnapshotSessionRequest: SnapshotSessionRequest). This method returns the response integration object (SnapshotSessionResponse: SnapshotSessionResponse), which contains the encoded binary data on the screen in which the user last clicked the Save button and the encoded binary data on the screens before that screen.
- 18 Process Snapshot Response.** This step calls the ProcessResponse method from the OPA Interview Framework Service business service. The input argument to this method is the response integration object (SnapshotSessionResponse: SnapshotSessionResponse) from the OPA outbound proxy call. This method extracts the interview data, and stores the data in the snapshot process property, which is passed to the application-specific workflow to persist the snapshot data in the Siebel application.
- 19 Has Request Sent.** This step calls the HasRequestSent method from the OPA Interview Framework Service. This method determines if a request for the current user action was already performed.

This step is required because when a user performs a screen-level action, such as Next, Back, Close, or Save, the client framework directly calls the framework workflow, and then control goes to the OPA Interview Service Main workflow to trigger the runtime event, which holds the interview session until the user clicks a screen-level action. This main workflow calls the OPA Interview Service Sub Workflow with this Has Request Sent step so that the action is not performed again for the same user action.

- 20 Is Screen Processed Already.** This step uses the output of the Has Request Sent step to determine whether the screen is already processed.
- 21 Populate OutPut Properties.** This step calls the PopulateOutPutProperties method from the OPA Interview Framework Service business service. This method returns the session ID and the snapshot data that is required for the OPA Interview Service Main Workflow when the Has Request Sent step returns a value of true.
- 22 Get Screen Processed Status.** This step calls the GetAction method from the OPA Interview Framework Service business service. This method returns Action, UserAction, IsInvestigateForPrevScreen, Is Last Screen, EndOfTransaction, and IsInvestigateAfterSubmit.
- 23 Is Investigate For Previous Screen.** This step uses the Action property to determine whether the user clicks the Back button to navigate to the previous screen.
- 24 Is Investigate For Next Screen.** This step uses the Action property to determine whether the user clicks the Next button to navigate to next screen.
- 25 Prepare Next Screen Investigate Request.** This step calls the Prepare Request method from the OPA Interview Framework Service business service. This method prepares the Investigate Request integration object (InvestigateRequest: InvestigateRequest) for next screen when the user clicks the Next button.
- 26 Is Investigate After Submit.** This step uses the IsInvestigateAfterSubmit property to determine whether the user clicks the Submit button.
- 27 Prepare Investigate After Submit.** This step calls the PrepareRequestAfterSubmit method from the OPA Interview Framework Service business service. This method prepares the Investigate Request integration object (InvestigateRequest: InvestigateRequest) when the user clicks the Submit button. This step determines whether to show a screen to the user after the user clicks the Submit button.
- 28 Is Snapshot with Current Screen.** This step uses the Save Current Screen Data property to determine whether to store the user data in current screen if the user clicks the Save button. OPA stores user data only when the user clicks the Save button. OPA does not store the user data in the current screen for a snapshot session request.
- 29 Is Snapshot Without Current Screen.** This step uses the Save Current Screen Data property to determine whether to save the user data on the screen in which the user last clicked the Save button.
- 30 Has Error In Response.** This step uses the Has Error In response property to determine whether an error or warning occurs at the validation level, screen level, or generic level.
- 31 Set Errors.** This step calls the SetErrors method from the OPA Interview Framework Service business service. This method prepares the error string, and stores the error string in the ErrorDetails process property. This property is used to display errors to users.
- 32 Is Save Data on Current Screen.** This step uses Save Current Screen Data property to determine whether to save the data on the current screen when the user clicks the Save button.

OPA Process Submit Data Workflow

This workflow converts the integration object for submitting data in Oracle Policy Automation (OPA) format to an integration object in Siebel format. [Figure 10](#) shows this workflow.

The OPA Interview Service Main Workflow calls this workflow as a subprocess.

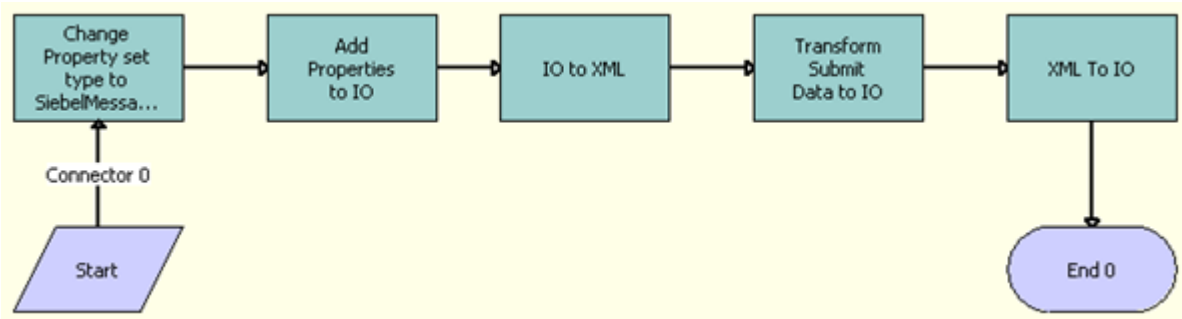


Figure 10. OPA Process Submit Data Workflow

Workflow Description. This workflow performs the following actions:

- 1 **Change Property Set Type To SiebelMessage.** This step calls the `ChangePropertysetType` method from the OPA Interview Framework Service business service. The input arguments to this method are the `InvestigateResponse` integration object (`InvestigateResponse: InvestigateResponse`), `PropertySetPath`, and `PropertySetType`. This method changes the property set type for the property set path, and returns the modified property set.
- 2 **Add Properties to IO.** This step calls the `AddPropertiesToPropertySet` method from the OPA Interview Framework Service business service. The input arguments to this method are the `InputData` integration object (`SiebelMessage`), `IOName`, `IOxml` tag name, `PrimaryIC`, `PrimaryIC XML` tag, and `PropertySetPath`. This method adds these properties to the property set at the property set path, and returns the updated property set as the `UpdatedInvestigateResponse` integration object (`SiebelMessage`).
- 3 **IO to XML.** This step calls the `IntObjHierToXMLDoc` method in the EAI XML Converter business service to convert the Siebel Message into XML format.
- 4 **Transform Submit Data to IO.** This step calls the `Transform` method from the EAI XSLT Service business service to convert the data for the submit-data integration component for the investigate-response integration object from OPA format to Siebel format.
- 5 **XML to IO.** This step calls the `XMLDocToIntObjHier` method from the EAI XML Converter business service to convert the XML data to an integration object.

OPA End Interview Workflow

This workflow ends an interview session. [Figure 11](#) shows this workflow.

The OPA Interview Service Main Workflow calls this workflow as a subprocess when the user clicks the Close button in an interview session or when an error or a Simple Object Access Protocol (SOAP) fault exception occurs in the interview session.

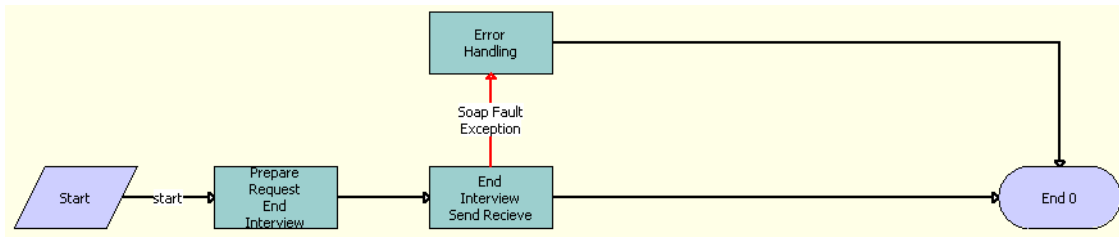


Figure 11. OPA End Interview Workflow

Workflow Description. This workflow performs the following actions:

- 1 **Prepare Request End Interview.** This step calls the Prepare Request method from the OPA Interview Framework Service business service to prepare the End Request integration object (EndInterviewRequest:EndInterviewRequest).
- 2 **End Interview Send Receive.** This step calls the EndInterview method from the odsInterviewService12.2_SiebelOPAIntegration_type outbound OPA business service. The input argument to this method is the EndInterview Request integration object (EndInterviewRequest:EndInterviewRequest). This method returns the response integration object (EndInterviewResponse:EndInterviewResponse).
- 3 **Error Handling.** This step calls the ErrorHandling method from the OPA Interview Framework Service business service if errors or Simple Object Access Protocol (SOAP) fault exceptions occur during the OPA outbound proxy call for the EndInterview method. The input arguments to the ErrorHandling method are the fault code and fault string.

OPA Get Meta Data Service For PUB Sample Intake Contact Workflow

This workflow prepares a response to a Simple Object Access Protocol (SOAP) GetMetadata request from the Oracle Policy Automation Hub, and sends the PUB Sample Intake Contact integration object to Oracle Policy Automation (OPA). [Figure 12](#) shows this workflow.

This workflow is called when OPA invokes the OPA Metadata Service for PUB Sample Intake Contact Web service with the GetMetadata operation.

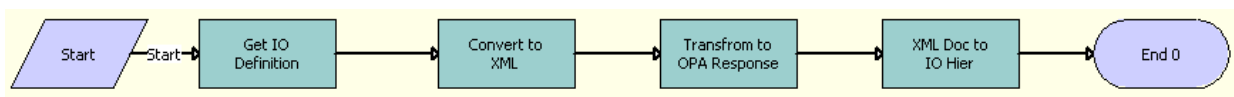


Figure 12. OPA Get Meta Data Service For PUB Sample Intake Contact Workflow

Workflow Description. This workflow performs the following actions:

- 1 **Get IO Definition.** This step calls the GetIntegrationObjectInfo method from the Integration ObjectInfo Service business service. The input argument to this method is the name of the PUB Sample Intake Contact integration object. This method returns the metadata of the PUB Sample Intake Contact integration object.
- 2 **Convert to XML.** This step calls the IntObjHierToXMLDoc method from the EAI XML Converter business service to convert the hierarchy of the Siebel integration object into an XML document. The input argument to this method is the output of [Step 1](#).
- 3 **Transform to OPA Response.** This step calls the Transform method from the EAI XSLT Service business service to perform the XSL transformation. An input argument to this method is the output of [Step 2](#). Another input argument to this method is XSLTFileLocation with a value of ../XSLT/GetMetaDataResp.xsl. This method returns the transformed data.
- 4 **XML Doc to IO Hier.** This step calls the GetIntegrationObjectInfo method from the Integration ObjectInfo Service business service to convert the transformed XML document into the get-metadata-response integration object. An input argument to this method is the output of [Step 3](#). Another input argument to this method is IntObjectName with a value of get-metadata-response. The converted output is sent to OPA.

OPA Metadata Service - CheckAlive Workflow

This workflow sends a response to a Simple Object Access Protocol (SOAP) CheckAlive request from the Oracle Policy Automation Hub to Oracle Policy Automation (OPA). This request checks the health of the network connections in OPA. This health check is called a ping. [Figure 13](#) shows this workflow.

This workflow is called when OPA invokes the OPA Metadata Service for PUB Sample Intake Contact Web service with the CheckAlive operation.

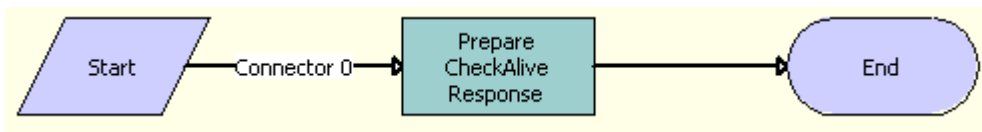


Figure 13. OPA Metadata Service - CheckAlive Workflow

Workflow Description. This workflow performs the following actions:

- 1 **Prepare CheckAlive Response.** This step calls the CreateEmptyPropSet method from the PRM ANI Utility Service business service. The input argument to this method is the check-alive-response integration object. This method returns an output argument that it sends to and receives from OPA.

Workflows for Cases

This group of workflows controls processing for cases on a Siebel Public Sector eService Web site. It includes the following workflows:

- “PUB Citizen Create Case Activity Workflow” on page 126
- “PUB Citizen Case Re-open Workflow” on page 126

PUB Citizen Create Case Activity Workflow

This workflow creates an activity record for a case record. [Figure 14](#) shows this workflow.

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

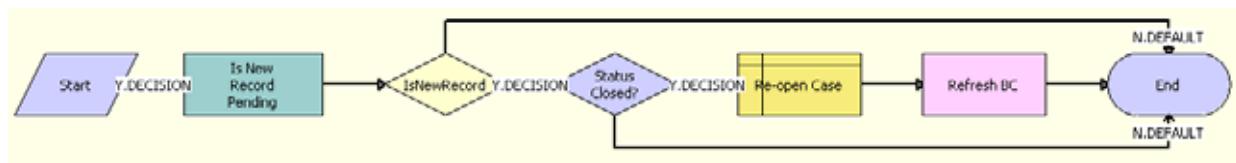


Figure 14. PUB Citizen Create Case Activity Workflow

Workflow Description. This workflow performs the following actions:

- 1 **Is New Record Pending.** This step verifies that the new activity record is pending. This step calls the Invoke BC method of the SIS OM PMT Service business service. For more information about this method, see *Siebel Order Management Infrastructure Guide*.
- 2 **IsNewRecord.** This step determines whether the new activity record is pending.
- 3 **Status Closed?** If the new activity record is pending, then this step determines whether the case is closed by checking for a Closed value in the Status field of the case.
- 4 **Re-open Case.** If the case is closed, then this step calls the PUB Citizen Case Re-open workflow. For more information, see “PUB Citizen Case Re-open Workflow” on page 126
- 5 **Refresh BC.** This step updates the business component for the case to indicate the case is now open. This step calls the Refresh Business Component method of the SIS OM PMT Service business service. For more information about this method, see *Siebel Order Management Infrastructure Guide*.

PUB Citizen Case Re-open Workflow

This workflow reopens a case. [Figure 15](#) shows this workflow.

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

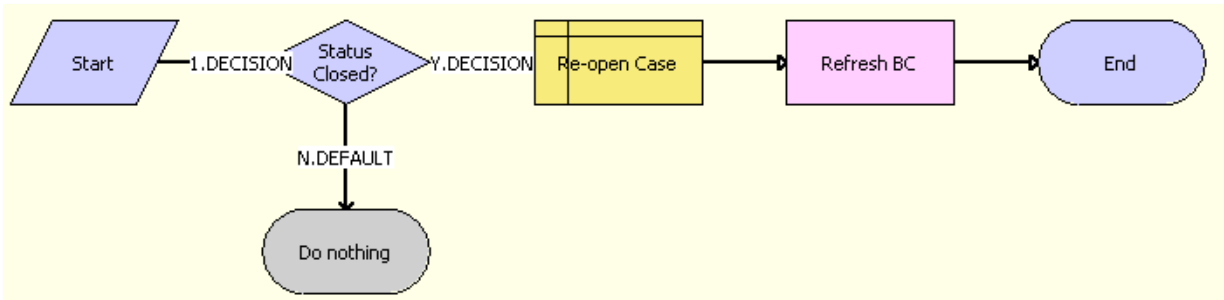


Figure 15. PUB Citizen Case Re-open Workflow

Workflow Description. This workflow performs the following actions:

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

B

Business Services for Oracle Policy Automation

This appendix includes information about the business services for Oracle Policy Automation. It includes the following topics:

- [OPA Interview Framework Service on page 129](#)
- [PUB OPA Utilities Service on page 135](#)
- [Metadata Filter Service on page 135](#)

OPA Interview Framework Service

This business service includes methods that accomplish the following actions:

- Make outbound Web service calls to interact with OPA (Oracle Policy Automation).
- Maintain the ID of an interview session.
- Handle the OPA response.
- Prepare a flat control property set that the dynamic frame class needs.
- Prepare responses to OPA by populating user data from the frame.
- Prepare any messages for errors, such as validation errors, screen-level errors, and generic errors, and transfers the messages to the client.

The `CSSOPAInterfaceFrameWorkService` class and the `ssopasvc.dll` file are associated with the OPA Interview Framework Service business service.

This business service includes the following methods:

- ["AddPropertiesToPropertySet Method" on page 130](#)
- ["AddSoapHdrFilter Method" on page 130](#)
- ["CacheSessionId Method" on page 130](#)
- ["ChangePropertysetType Method" on page 131](#)
- ["Clearflags Method" on page 131](#)
- ["ConvertSiebelIntObjToStartInterviewReqIntObj Method" on page 131](#)
- ["ErrorHandling Method" on page 131](#)
- ["Get Action Method" on page 131](#)
- ["GetAdminMappingInfo Method" on page 131](#)
- ["GetAdminMappingInfoAndCache Method" on page 132](#)
- ["GetCachedIO Method" on page 132](#)

- “GetPropertySet Method” on page 132
- “HasRequestSent Method” on page 132
- “InvokeWorkflow Method” on page 132
- “PopulateOutPutProperties Method” on page 133
- “Prepare Request Method” on page 133
- “PrepareRequestAfterSubmit Method” on page 133
- “PrepareRequestGetInputData Method” on page 133
- “PrepareRequestGetSeedData Method” on page 133
- “PrepareRequestInvestigateWithPrevScreen Method” on page 134
- “PrepareRequestStartInterview Method” on page 134
- “ProcessResponse Method” on page 134
- “SetErrors Method” on page 134
- “SetSearchSpecToSiebelMsg Method” on page 134
- “ShowErrors Method” on page 134

AddPropertiesToPropertySet Method

This method takes the ApplicationIntegrationObject (SiebelMessage), application row id, application status, application submitted by, and PropertySetPath as input arguments. It adds any number of properties to property set at the property set path, and returns the updated property set as the UpdatedApplicationIntegrationObject (SiebelMessage).

The property set path determines the hierarchy or level under to add the property and update the property set. An example path follows: SiebelMessage/ListOfPUB Intake Application/PUB Intake Application.

AddSoapHdrFilter Method

This method adds a custom Simple Object Access Protocol (SOAP) header to the Oracle Policy Automation request. A custom SOAP header includes the user credentials and locale. This method is used in to administer outbound web services.

CacheSessionId Method

This method stores the session ID in one of the member variables. This session ID is used for subsequent requests.

ChangePropertysetType Method

This method takes the InputData integration object (GetInputDataDefinitionResponse: GetInputDataDefinitionResponse), PropertySetPath, and PropertySetType as input arguments. The OPA Process Submit Data workflow and OPA Get Preseed Data Workflow call this method.

Clearflags Method

This method clears all the flags and information from the global session.

ConvertSiebelIntObjToStartInterviewReqIntObj Method

This method converts the integration object for Siebel data to the start-interview-request integration object for Oracle Policy Automation (OPA). The OPA Get Preseed Data workflow calls this method.

ErrorHandling Method

This method handles Simple Object Access Protocol (SOAP) fault exceptions during Oracle Policy Automation (OPA) outbound proxy calls applicable to start-interview, investigate, snapshot-session, restore-session, end-interview. It takes the fault code and fault string as input arguments, and prepares an error message string. The SetErrors method uses this string to propagate error messages to the client, and the ShowErrors method uses this string to display error messages to users. The OPA Interview Service Main workflow, OPA Interview Service Sub workflow, and OPA End Interview workflow call this method.

Get Action Method

This method reads the user action from the global session and returns the appropriate action type. Action types include: Start Interview, Investigate or End Interview.

GetAdminMappingInfo Method

This method reads the properties from OPA Integration Mapping View, and adds them to the Siebel Message property set.

The MappingName field is optional, but if this field is defined, then the mapping parameters must be defined. The BusObjName, BusCompName, and ActiveRowId fields are required to evaluate expressions for business components. These fields must be inactivated to continue to evaluate generic expressions that do not involve business components.

This method reads all of the mapping parameters. These parameters can be passed as input parameters when invoking a workflow or as a process property. If a parameter value is defined as a workflow input or process property and also defined in the OPA Integration Mapping view, then the value in the OPA Integration Mapping view is considered.

GetAdminMappingInfoAndCache Method

This method reads the properties from OPA Integration Mapping View, adds them to the Siebel Message property set, and caches the property set. This method calls the GetAdminMappingInfo method to read the mapping parameters.

GetCachedIO Method

This method takes the rule base name as an input argument, and reruns a value of true if the seed integration object is available in cache and a value of false if the seed integration object is not available in the cache.

GetPropertySet Method

This method takes the property set and property set type as input arguments, and returns the child property set. It parses through the property set path, iterates the property set to last child level in the path, and returns the child property set.

HasRequestSent Method

This method determines whether the request must be sent to the OPA Server and updates the HasRequestSentFlg output parameter accordingly.

InvokeWorkflow Method

This method calls the OPA Interview Service Main workflow. The workflow is configured for multiple synthetic events. Synthetic events work on the primary business component. Consequently, the dynamic applet is associated with an OPA Integration virtual business component. A dummy record is created in the virtual business component with the PRIMARY ROW ID needed for the synthetic events to work. In this method, the virtual business component is instantiated, the dummy record ID is passed to the ROW_ID property of the workflow input, and the workflow is invoked.

You configure the required input parameters to the workflow in the OPA Integration Mapping view. This method reads all of the mapping parameters. These parameters can be passed as input parameters when invoking a workflow or as a process property. If a parameter value is defined as a workflow input or process property and also defined in the OPA Integration Mapping view, then the value in the OPA Integration Mapping view is considered.

PopulateOutPutProperties Method

This method returns the session ID and the snapshot data that is required for the OPA Interview Service Main Workflow when the Has Request Sent step returns a value of true.

Prepare Request Method

This method prepares the request integration object for the Oracle Policy Automation outbound web service for the following actions:

- Start interview (StartInterviewRequest: StartInterviewRequest)
- Investigate for next screen (InvestigateRequest: InvestigateRequest)
- Snapshot interview (SnapshotSessionRequest: SnapshotSessionRequest)
- Restore interview (RestoreSessionRequest: RestoreSessionRequest)
- End interview (EndInterviewRequest: EndInterviewRequest)

This method reads operation type from the global session and makes the appropriate call. The frame determines the operation type.

PrepareRequestAfterSubmit Method

This method prepares the Investigate Request integration object (InvestigateRequest: InvestigateRequest) when the user clicks the Submit button. This step determines whether to show a screen to the user after the user clicks the Submit button.

PrepareRequestGetInputData Method

This method prepares the Oracle Policy Automation request for the GetInputDataDefinition action for the Simple Object Access Protocol (SOAP) if the seed integration object is not present in the cache. It prepares the GetInputDataDefinition Request integration object (GetInputDataDefinitionRequest: GetInputDataDefinitionRequest). The OPA Answer Service workflow calls this method.

PrepareRequestGetSeedData Method

This method prepares the Oracle Policy Automation request for the GetInputDataDefinition action for the Simple Object Access Protocol (SOAP) if the seed integration object is not present in the cache. It prepares the GetInputDataDefinition Request integration object (GetInputDataDefinitionRequest: GetInputDataDefinitionRequest). The OPA Get PreSeed Data workflow calls this method.

PrepareRequestInvestigateWithPrevScreen Method

This method prepares the Investigate Request integration object (InvestigateRequest: InvestigateRequest) for the previous screen when the user clicks the Back button.

PrepareRequestStartInterview Method

This method prepares to start the interview request with seed data. It takes Siebel message as the input argument, and prepares the Start Interview Request integration object (StartInterviewRequest: StartInterviewRequest).

ProcessResponse Method

This method processes the response from Oracle Policy Automation (OPA). It prepares the flat property set and extra property set, and updates these property sets into the global session. It also checks for errors, such as validation errors, screen-level errors, and generic errors, in the OPA response, and updates the Has Errors In Response and the ErrorDetails output parameters. If the OPA response has no errors, then it sets the Has Errors In Response output parameter to FALSE.

SetErrors Method

This method sets the ErrorDetails property set with errors, such as validation errors, screen-level errors, and generic errors. The client or the application specific workflow uses this property set to display the errors.

SetSearchSpecToSiebelMsg Method

This method takes the custom search specification as an input argument, and sets the search specification to the integration object. It parses the search specification, and sets the search specification for corresponding integration component in the Siebel Message.

ShowErrors Method

This method displays error messages for Simple Object Access Protocol (SOAP) fault exceptions and errors that occur when starting or resuming an interview session. The OPA Interview Service Main workflow calls this method.

PUB OPA Utilities Service

This business service performs add, update, and query operations on a business object and business component. For example, this service adds or updates an application record when a citizen saves or submits an application, and this service queries for an application record when a citizen resumes completing a saved application.

The CSSPUBOPAUtiService class and the SSCAHSSV.dll file are associated with the PUB OPA Utilities Service business service.

This business service includes the UpsertRecord method.

UpsertRecord Method

This method performs add, update, and query operations on a business object and business component. It requires the following input arguments:

- **BO Name.** The value for this input argument is the business object name for the application.
- **BC Name.** The value for this input argument is the business component name for the application associated with the business object.
- **Method.** The value for this input argument is the operation (for example, Upsert or Query).
- **Search Spec.** The value for this input argument is the search specification to apply when performing the operation.

You can pass an input field and output field to this method in the following format:

InputField: *Input parameter name*

OutputField: *Output parameter name*

You can pass any number of input fields and get any number of output fields using this method. Consequently, any input and output field on any business object and business component can use this method.

Metadata Filter Service

This business service is a filter service for the OPA Metadata Service for PUB Sample Intake Contact Web service.

The OPA Metadata Service for PUB Sample Intake Contact Web service exposes the PUB Sample Intake Contact integration object, which is used for mapping in the Oracle Policy Modeling tool. In Siebel Public Sector, you can navigate to the Inbound Web Services view of the Administration - Web Services screen to see details about this Web service, including its service ports and operations.

This business service includes the following methods:

- [“Request Filter Method” on page 136](#)
- [“Response Filter Method” on page 136](#)

Request Filter Method

When Oracle Policy Automation invokes the CheckAlive operation or GetMetadata operation in the OPA Metadata Service for PUB Sample Intake Contact Web service, it does not send the CheckAlive_Input element or the GetMetaData_Input element in the Simple Object Access Protocol (SOAP) body. Because the Siebel application expects this element from the SOAP body, it cannot process the request message. This method reads the SiebelMsgIn input argument, adds the CheckAlive_Input element or the GetMetaData_Input element to it (the SOAP body), and returns the modified message to the SiebelMsgOut output argument.

You must set the ReqOperNamespace user property to TRUE so that the operation for the OPA Metadata Service for PUB Sample Intake Web service is sent to the Metadata Filter Service business service.

Response Filter Method

When the Siebel application responds to an Oracle Policy Automation (OPA) request, it adds the CheckAlive_Output element or the GetMetaData_Output element in the Simple Object Access Protocol (SOAP) body. Because OPA does not expect this element in the SOAP body, it cannot process the response message. This method reads the SiebelMsgIn input argument, removes the CheckAlive_Output element or the GetMetaData_Output element from it (the SOAP body), and returns the modified message to the SiebelMsgOut output argument.

You must set the ReqOperNamespace user property to TRUE so that the operation for the OPA Metadata Service for PUB Sample Intake Web service is sent to the Metadata Filter Service business service.

Index

A

- access control** 53
- AddPropertiesToPropertySet method** 130
- AddSoapHdrFilter method** 130
- appeal requests, viewing status of** 101
- appeals, requesting for cases** 101
- applet form section template, about** 31
- applet Web template, about** 31
- applets, configuring for program information** 61
- Application Object Manager components**
 - about for Siebel eService 21
 - process of adding for Siebel eService 21
- applications**
 - adding attachments to 94
 - cancelling 95
 - deleting 95
 - managing on Siebel Public Sector eService 89
 - resuming the submission of 91
 - revising rejected 93
 - viewing status of submitted 92
- appointment requests, viewing status of** 100
- appointments, requesting for cases** 99
- attachment tile applet Web template, about** 32
- attachments**
 - adding to applications 94
 - associating with service requests 69
- authentication, about** 52

B

- benefits eligibility, determining on Siebel Public Sector eService** 88
- benefits, applying for** 89
- business services**
 - Metadata Filter Service 135
 - OPA Interview Framework Service 129
 - PUB OPA Utilities Service 135

C

- CacheSessionId method** 130
- cascading style sheets, about cases** 32
 - managing on Siebel Public Sector

- eService 96
 - requesting appeals for 101
 - requesting appointments for 99
 - updating 97
 - viewing 96
 - workflows for 126
- categories, creating for office locations** 64
- ChangePropertysetType method** 131
- Clearflags method** 131
- component groups, enabling for email notifications** 70
- configuration tools, for Siebel eService Web site** 31
- contacts, about in Siebel Public Sector** 88
- control types**
 - custom properties for 39
 - for integrating Oracle Policy Automation 39
- controls, about** 32
- ConvertSiebellntObjToStartInterviewReqInt Obj method** 131
- custom properties**
 - for control types 39
 - for entities 42
 - for screens 41
- customers**
 - about anonymous 52
 - about registered 52
 - designating for email notifications 71
 - registering 59

D

- data privacy, about** 53
- database server, about** 17
- detail applet Web template, about** 31
- divisions, creating for office locations** 63

E

- email**
 - about sending 16
 - sending to Web site host 81
 - setting up information for 66
- email notifications**
 - about 54
 - designating customers for 71
 - enabling component groups and policies for 70

process of setting up 70
Email Password button, activating the workflow for 59
entities, custom properties for 42
ErrorHandling method 131
explicit login applet Web template, about 32
expressions, constructing 57

F

form applet Web template, about 31
form base applet Web template, about 31

G

Generate Triggers component
 changing parameters for 71
 starting the task for 72
geocode data, importing 62
Get Action method 131
GetAdminMappingInfo method 131
GetAdminMappingInfoAndCache method 132
GetCachedIO method 132
GetPropertySet method 132
Google Maps, linking search results to 65

H

HasRequestSent method 132

I

interview sessions
 parameters for configuring 44
 workflows for 110
InvokeWorkflow method 132

L

login applet Web template, about 32

M

manifest files, for view and applet of OPA Interview Service 43
map services, linking search results to 65
MapQuest, linking search results to 65
Metadata Filter Service business service 135
methods
 AddPropertiesToPropertySet 130
 AddSoapHdrFilter 130
 CacheSessionId 130
 ChangePropertysetType 131
 Clearflags 131
 ConvertSiebelIntObjToStartInterviewReqIntO

bj 131
 ErrorHandling 131
 Get Action 131
 GetAdminMappingInfo 131
 GetAdminMappingInfoAndCache 132
 GetCachedIO 132
 GetPropertySet 132
 HasRequestSent 132
 InvokeWorkflow 132
 PopulateOutPutProperties 133
 Prepare Request 133
 PrepareRequestAfterSubmit 133
 PrepareRequestGetInputData 133
 PrepareRequestGetSeedData 133
 PrepareRequestInvestigateWithPrevScreen 134
 PrepareRequestStartInterview 134
 ProcessResponse 134
 Request Filter 136
 Response Filter 136
 SetErrors 134
 SetSearchSpecToSiebelMsg 134
 ShowErrors 134
 UpsertRecord 135

N

national identification numbers, about 88
navigation links, administering 54
new_comp_sia.dat file, editing 21
new_compdef_sia script, running 24
new_virdirs script
 editing 25
 running 26
news articles, reviewing 79

O

office locations
 about finding 16
 creating 64
 creating categories for 64
 creating divisions for 63
 finding 80
 process of setting up 62
OPA Interview Framework Service business service 129
Oracle Knowledge applet Web template, about 32
Oracle Knowledge search applet Web template, about 32
Oracle Knowledge, about configuring for Siebel eService 30
Oracle Policy Automation
 control types for integrating 39

- integrating with Siebel Public Sector eService 32
- prerequisites for integrating 33
- securing Web service communications with 37
- showing details of in Siebel Public Sector eService 38

P

- page container Web template, about** 31
- passwords**
 - obtaining new 77
 - reassigning 60
- policies**
 - about for eService 54
 - enabling for email notifications 70
- PopulateOutPutProperties method** 133
- Prepare Request method** 133
- PrepareRequestAfterSubmit method** 133
- PrepareRequestGetInputData method** 133
- PrepareRequestGetSeedData method** 133
- PrepareRequestInvestigateWithPrevScreen method** 134
- PrepareRequestStartInterview method** 134
- ProcessResponse method** 134
- program information**
 - about obtaining 16
 - configuring applets for 61
 - obtaining on Siebel eService Web site 78
 - reviewing 79
 - searching the knowledge database for 78
- PUB OPA Utilities Service business service** 135

R

- registration, workflows for** 103
- Request Filter method** 136
- Response Filter method** 136

S

- screens, custom properties for** 41
- security framework, about** 51
- service requests**
 - about managing 16
 - adding attachments to 83
 - adding updates to 67, 84
 - associating attachments with 69
 - associating solutions with 69
 - managing on the Siebel eService Web site 82
 - process of administering 67
 - submitting 83
 - viewing solutions for 85
- SetErrors method** 134

- SetSearchSpecToSiebelMsg method** 134

- ShowErrors method** 134

- Siebel Enterprise Server, about** 17

Siebel eService

- about administering 51
- about configuring 29
- about deploying 18
- about setting up 19
- configuring 30
- features of 16
- requirements for installing 17
- roadmap for setting up 20
- tasks for customer service representatives in 16

Siebel eService Web site

- about logging in to 15
- about navigating in 15
- accessing 76
- configuration tools for 31
- logging in to 77
- logging out of 77
- registering on 75
- tasks for customers on 15

Siebel Public Sector eService

- about 87
- integrating Oracle Policy Automation with 32

Siebel Public Sector, about contacts in social media applet Web template, about solutions

- associating with service requests 69
- creating 68

T

- tile list applet Web template, about** 32

Twitter

- about using 16
- accessing on the Siebel eService Web site 82
- setting up applet for 46

Twitter timeline, displaying the height and width of

- 49

Twitter widget

- displaying in Siebel eService 48
- obtaining 46

U

- UpsertRecord method** 135

user profiles

- about managing 15
- managing on Siebel eService Web site 75
- updating 76

V

- vertical tile list applet Web template,**

- about 32
- view **Web template, about** 31
- view with home page **Web template, about** 31
- virtual directories, process of adding for **Siebel eService** 25

W

- Web access, process of administering** 58
- Web server, about** 17
- Web site host**
 - contacting 80
 - finding office locations of 80
 - sending email to 81
- Workflow Monitor Agent component**
 - changing parameters for 72
 - starting the task for 73
- workflows**
 - OPA End Interview Workflow 123
 - OPA Get Meta Data Service For PUB Sample Intake Contact Workflow 124

- OPA Get PreSeed Data Workflow 117
- OPA Integration Sub Workflow 112
- OPA Integration Workflow 111
- OPA Metadata Service - CheckAlive Workflow 125
- OPA Process Submit Data Workflow 123
- PUB Citizen Case Re-open Workflow 126
- PUB Citizen Create Case Activity Workflow 126
- Pub Citizen User Registration Forgot Password Process 110
- Pub Citizen User Registration Process 107
- User Registration Forgot Password (CX eService) 109
- User Registration Initial Process 103
- User Registration Process OUI 105
- User Registration SubProcess OUI 107

Y

- Yahoo, linking search results to** 65