



PeopleSoft 8
Mobile Sales for WAP Phones
PeopleBook

PeopleSoft 8 Mobile Sales for WAP Phones PeopleBook

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PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

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ABOUT THIS PEOPLEBOOK

The book provides you with the information that you need to implement and use PeopleSoft *Mobile Sales for WAP Phones*. You can order the online version by requesting SKU *CRMB8R0* or the print version by requesting SKU *CRMr8CVMS-B 0601*.

This section describes information that you should know before you begin working with PeopleSoft products and documentation, including PeopleSoft-specific documentation conventions, information specific to the PeopleSoft *Customer Relationship Management* product line, how to order additional copies of our documentation, and so on.

Before You Begin

To benefit fully from the information covered in this book, you need to have a basic understanding of how to use PeopleSoft applications. We recommend that you complete at least one PeopleSoft introductory training course.

You should be familiar with navigating through the system and adding, updating, and deleting information using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft® Windows or Windows NT graphical user interface.

Because we assume that you already know how to navigate around the PeopleSoft system, much of the information in this book is not procedural. That is, it does not typically provide step-by-step instructions on using tables, pages, and menus. Instead, we provide you with all the information that you need to use the system most effectively and to implement your PeopleSoft application according to your organizational or departmental needs. This book expands on the material covered in PeopleSoft training classes.

Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of other PeopleSoft applications. You can access additional documentation for this release from PeopleSoft Customer Connection (www.peoplesoft.com). We post updates and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.

Important! Before upgrading, it is *imperative* that you check PeopleSoft Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

Documentation on the Internet

You can order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM. You can order additional copies of the PeopleBooks CDs through the Documentation section of the PeopleSoft Customer Connection web site:

<http://www.peoplesoft.com/>.

You'll also find updates to the documentation for this and previous releases on Customer Connection. Through the Documentation section of Customer Connection, you can download files to add to your PeopleBook library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation delivered on your PeopleBooks CD.

Documentation on CD-ROM

Complete documentation for this release is provided on the CD-ROM *Customer Relationship Management* SKU *CRMB8R0*.

Note. Your access to PeopleSoft PeopleBooks depends on which PeopleSoft applications you've licensed. You may not have access to some of the PeopleBooks listed here.

Hardcopy Documentation

To order printed, bound volumes of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM, visit the PeopleSoft Press web site from the Documentation section of PeopleSoft Customer Connection. The PeopleSoft Press web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), our book print vendor.

We make printed documentation for each major release available shortly after the software is first shipped. Customers and partners can order printed PeopleSoft documentation using any of the following methods:

Internet

From the main PeopleSoft internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order.

PeopleSoft internet site: **<http://www.peoplesoft.com/>**.

Telephone

Contact Consolidated Publishing Incorporated (CPI) at 800 888 3559.

Email

Email CPI at callcenter@conpub.com.

Typographical Conventions and Visual Cues

To help you locate and interpret information, we use a number of standard conventions in our online documentation.

Please take a moment to review the following typographical cues:

`monospace font`

Indicates a code example.

Bold

Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold).

Italics

Indicates a PeopleSoft or other book-length publication. We also use italics for *emphasis* and to indicate specific field values. When we cite a field value under the page on which it appears, we use this style: ***field value***.

We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number *0*, not the letter *O*.

KEY+KEY

Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.

Cross-references

The phrase "For more information" indicates where you can find additional documentation on the topic at hand.

- Capitalized titles in *italics* indicate the title of another PeopleBook. For example: For more information about billing, see *PeopleSoft 8 Billing PeopleBook*.
- Capitalized titles in *italics* followed by chapter title in quotes refer to a chapter in another PeopleBook. For example: For more information about establishing rate templates, see *PeopleSoft 8 Projects PeopleBook*, "Integrating With PeopleSoft Billing and PeopleSoft Contracts."
- Capitalized titles in quotes refer to another chapter of this PeopleBook. For example: For more information about contract status security, see "Securing Your PeopleSoft Contracts System."
- Capitalized titles refer to sections within this chapter of this PeopleBook. For example: For more information about Defining Contract Statuses, see Defining Your Own Contract Statuses.

Note. Text in this bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by **Important!**, the note is crucial and includes information that concerns what you need to do for the system to function properly.

Text in this bar indicates **For more information** cross-references to related or additional information.

Warning! Text within this bar indicates a crucial configuration consideration. Pay very close attention to these warning messages.

Page and Panel Introductory Table

In the documentation, each page or panel description in the application includes an introductory table with pertinent information about the page. Not all of the information will be available for all pages or panels.

Usage	Describes how you would use the page, panel, or process.
Object Name	Gives the system name of the page, panel, or process as specified in PeopleTools Application Designer. For example, the Object Name of the Detail Calendar page is <code>DETAIL_CALENDAR1</code> .
Navigation	Provides the path for accessing the page, panel, or process.
Prerequisites	Specifies which objects must have been defined before you use the page, panel, or process.
Access Requirements	Specifies the keys and other information necessary to access the page or panel. For example, SetID and Calendar ID are required to open the Detail Calendar page.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like changed, about our documentation, PeopleBooks, and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager
 PeopleSoft, Inc.
 4460 Hacienda Drive
 Pleasanton, CA 94588

Or send comments by email to the authors of PeopleSoft documentation at:

DOC@PEOPLESOFT.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

CHAPTER 1

Introducing PeopleSoft Mobile Sales for WAP Phones

The PeopleSoft Mobile Sales for WAP Phones application enables a mobile sales professional to use a WAP-enabled digital cellular phone to perform fundamental sales automation tasks, including calendar, activity, and customer management. Because this activity updates the common PeopleSoft CRM database in realtime, important data is immediately visible to other users of the PeopleSoft CRM suite.

PeopleSoft Mobile Sales for WAP Phones Functionality

PeopleSoft Mobile Sales for WAP Phones enables a sales representative to access customer information from the PeopleSoft CRM Sales database and display it on a WAP-enabled cellular phone. The following table shows functionality available to the user.

<i>Property</i>	<i>View?</i>	<i>Edit?</i>
Customer	Yes	No
Contact	Yes	Yes
Leads	Yes	Yes
Opportunity	Yes	Yes
Task	Yes	No

Platform Variables

The variety of wireless devices available in today's marketplace and the speed at which the technology changes require that our documentation be general in nature when referring to wireless devices as platforms for PeopleSoft Mobile Sales for WAP Phones.

We assume that users are familiar with the operating requirements and capabilities of their particular wireless devices.

For more information about keypad usage, navigation, and display functions, see Using PeopleSoft Mobile Sales for WAP Phones.

PeopleSoft Mobile Sales for WAP Phones requires that the wireless device is WAP compliant. The client device must be minimally equipped with the Openwave Systems, Inc. (Phone.com) 3.1 microbrowser, supporting WML 1.1 or later. PeopleSoft recommends use of a wireless device equipped with the Openwave 4.1 (or later) microbrowser, if available.

Service Provider Requirements

Before implementing PeopleSoft Mobile Sales for WAP Phones, you must establish wireless data service with an appropriate wireless service provider, such as Sprint PCSSM, Nextel, or CingularSM Wireless.

Installing PeopleSoft Mobile Sales for WAP Phones

This chapter provides instructions for installing the PeopleSoft Mobile Sales for WAP Phones application with PeopleSoft CRM. These instructions assume that you have already installed and configured the PeopleSoft CRM Sales application.

Before You Begin

Following are several requirements for using PeopleSoft Mobile Sales for WAP Phones, as well as recommendations to enhance usability and performance:

- Your installation must include PeopleSoft CRM Sales.
- You must have PeopleSoft Internet Architecture installed with the PeopleSoft Mobile Applications option selected in the Select Internet Products dialog box.
- The wireless device on which you intend to run the PeopleSoft Mobile Sales for WAP Phones application must support WAP (Wireless Application Protocol) capabilities.
- PeopleSoft recommends that you install your PeopleSoft Mobile Sales for WAP Phones web server behind a firewall with at least one port open to the internet.

This enables the WAP gateway to locate the web server from the internet.

- PeopleSoft recommends that when you define user IDs and passwords for your mobile sales users, you consider keypad usability.

For example, a user ID or password that contains special characters, combinations of upper and lowercase characters, or alphanumeric combinations can significantly slow the signon process.

For more information about setting up PeopleSoft CRM Sales, see *Defining Users and Territories*.

Installing PeopleSoft Mobile Sales for WAP Phones

This section provides instructions for installing PeopleSoft Mobile Sales for WAP Phones on PeopleSoft 8 CRM.

To install PeopleSoft Mobile Sales for WAP Phones:

1. Insert the PeopleSoft Mobile Sales for WAP Phones CD into the CD-ROM drive of the file server.
2. Run setup from the root directory of the CD.
3. Read the Welcome screen, then click **Next**.
4. Click **Yes** to accept the Software License Agreement.
5. Enter the PeopleSoft license code, and click **Next**.
6. Specify the database, and click **Next**.
7. Select a Unicode or Non-Unicode database, and click **Next**.

A Component Selection screen appears.

8. Check that PeopleSoft Mobile Sales for WAP Phones is selected, and specify the destination directory.

PeopleSoft recommends installing into the PeopleTools directory.

9. Confirm the database platform and product selection.

Once confirmed, the installation program copies the PeopleSoft Mobile Sales for WAP Phones project, data, and scripts into corresponding directories in the location you specified.

Copying the PeopleSoft Mobile Sales for WAP Phones Project

After running the installation program, copy the PeopleSoft Mobile Sales for WAP Phones project into the PeopleSoft CRM database.

To copy the project:

1. Open Application Designer, signing on as PSCR or PTDMO.
2. Select File, Copy Project from File.

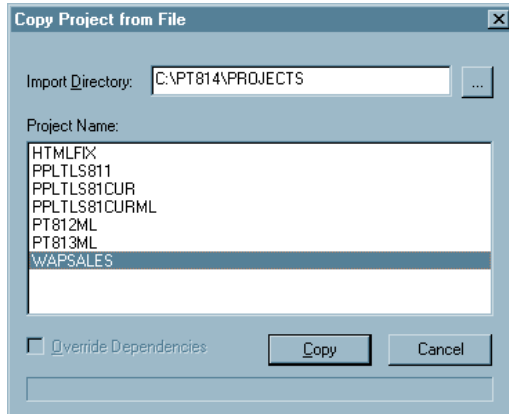
The Copy Project from File dialog box appears.

3. Specify in the **Import Directory** field the projects directory to which the PeopleSoft Mobile Sales for WAP Phones project file was installed, or navigate to the directory.

For example, C:\PT814\Projects.

The Project Name list box lists all projects under the specified project directory.

4. Select the WAPSALES project.

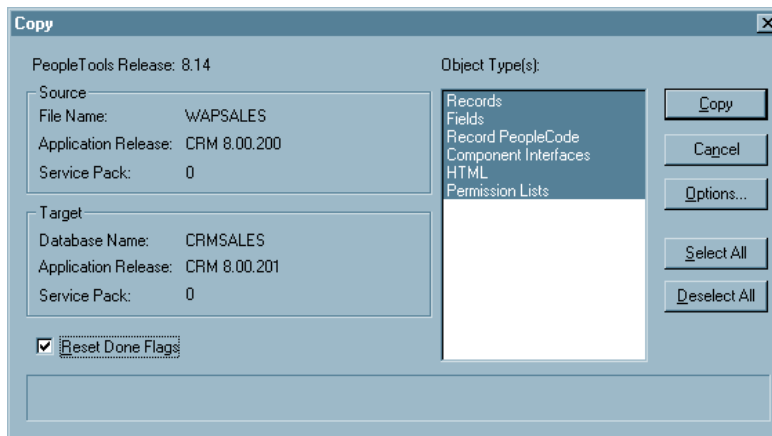


Copy Project from File dialog box

5. Click Copy.

The Copy dialog box appears.

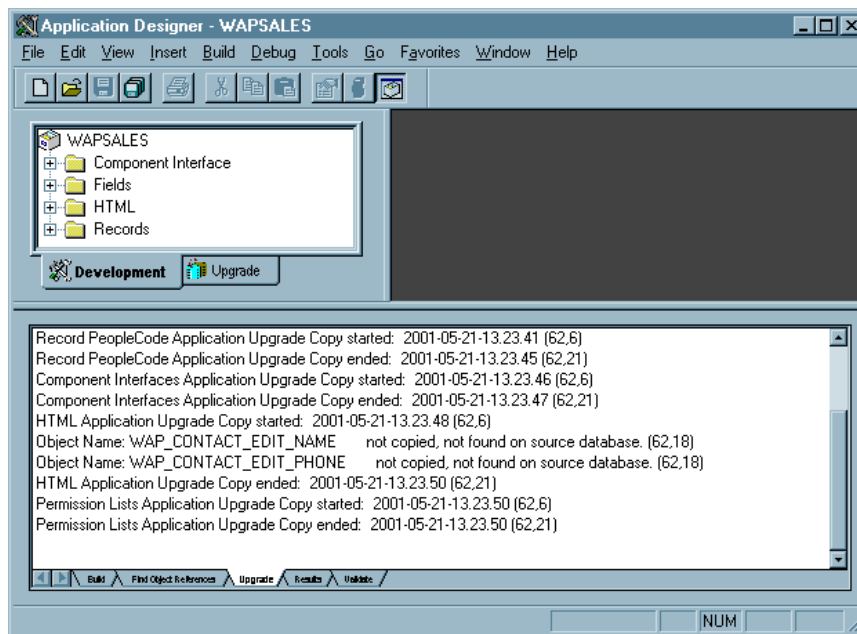
6. All **Object Type(s)** should appear selected by default; if not, click **Select All**.



Copy dialog box for PeopleSoft Mobile Sales for WAP Phones project

7. Click Copy.

When the Copy from File process completes successfully, the system creates a new project definition from the PeopleTools objects in the current database.



Application Designer after copying the mobile sales project

8. Close Application Designer.

Moving Messages to the Message Catalog

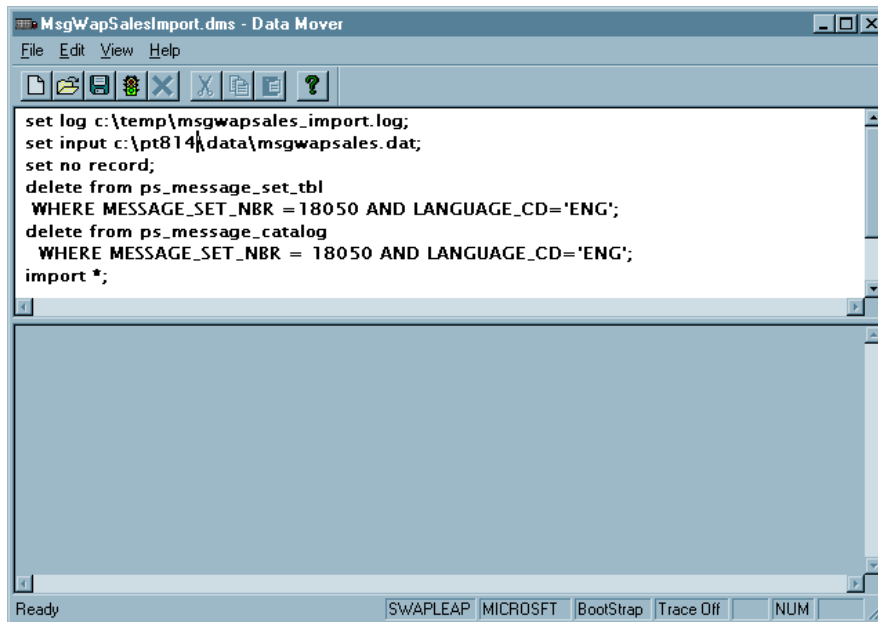
Use Data Mover to move the associated messages into the Message Catalog by running the Data Mover script (DMS) MsgWapSalesImport.dms.

For more information about using Data Mover, see the *PeopleSoft 8 Installation and Administration* guide for your database.

To move messages:

1. Open Data Mover, signing on as a user who can access the PeopleSoft CRM database, such as PSCR.
2. Select **File, Open** and choose MsgWapSalesImport.dms from the scripts directory of your PeopleSoft Mobile Sales for WAP Phones installation.

For example, C:\PT814\scripts.



Data Mover with MsgWapSalesImport.dms script

3. Check that the set input statement in MsgWapSalesImport.dms points to the data directory that you specified at installation of PeopleSoft Mobile Sales for WAP Phones.

For example, C:\PT814\data\msgwapsales.dat.

4. Select **File, Run Script** to run the script.
5. Close Data Mover.

Validate Files

Each Data Mover script produces a .LOG file. The log file is located in the directory that you specified in the Create Data Mover Import Scripts task during PeopleTools installation. Examine the log file to ensure that all the commands ran successfully.

Configuring PeopleSoft Mobile Sales for WAP Phones

This section describes how to configure the web server and application server domain to support PeopleSoft Mobile Sales for WAP Phones.

For more information about setting up PeopleSoft CRM Sales, see Defining Users and Territories.

Setting Installation Status

To complete installation of PeopleSoft Mobile Sales for WAP Phones, enable the product in the General Options menu.

To enable PeopleSoft Mobile Sales for WAP Phones in the General Options menu:

1. Sign on to your PeopleSoft CRM website with your web browser.
For example, `http://<machine_name>/peoplesoft8/signon.html`
2. Select Define Business Rules, Define General Options, Use E-Q, Installation.
3. Under **PeopleSoft Products** on the General Options page, select **PeopleSoft Mobile Sales for WAP Phones** if it is not already selected.
4. Click **Save**.

Configuring the Web Server

Note. For PeopleSoft Internet Architecture to support the PeopleSoft Mobile Sales for WAP Phones application, specify PeopleSoft Mobile Applications in the Select Internet Products dialog box during PeopleSoft Internet Architecture installation. If you did not specify PeopleSoft Mobile Applications during installation, run PeopleSoft Internet Architecture setup again.

For more information about installing PeopleSoft Internet Architecture, see the *PeopleSoft Installation and Administration* guide for your database.

Creating an Additional Website

PeopleSoft recommends dedicating a website specifically for PeopleSoft Mobile Sales for WAP Phones. If your mobile website is already used by another application, create another website using the following instructions.

To create another website:

1. Locate the mobile application directories in the web server directory structure.

For Apache web server on Windows NT, the default directories are `C:\Program Files\Apache Group\Apache\htdocs\peoplesoft8m` and `C:\Program Files\Apache Group\Apache\psftdocs\peoplesoft8m`.

For WebLogic web server, the default directories are `C:\weblogic\myserver\public_html\peoplesoft8m` and `C:\weblogic\myserver\psftdocs\peoplesoft8m`.

2. Create a new directory under \htdocs (Apache) or \public_html (WebLogic).
Name the new directory something other than peoplesoft8m. The name is optional, but could be, for example, \htdocs\<WAP_SITE>.
3. Copy the contents of the \htdocs\peoplesoft8m\ or \public_html\peoplesoft8m directory (including subdirectories) into the new directory created in Step 2.
4. Create a new directory under \psftdocs\.
Name the new directory something other than peoplesoft8m. The name is optional, but could be, for example, \psftdocs\<WAP_SITE>.
5. Copy the contents of the \psftdocs\peoplesoft8m\ directory into the new directory created in Step 4.

Updating signon.wml

If you created a new website as described in Creating an Additional Website, or renamed your mobile website directory during PeopleSoft Internet Architecture installation, update signon.wml to refer to the new <WAP_SITE> directory.

To update signon.wml:

1. Locate signon.wml in the C:\Program Files\Apache Group\Apache\htdocs\peoplesoft8m (or corresponding WebLogic) directory.
If you created a website dedicated to PeopleSoft Mobile Sales for WAP Phones, use the start.wml file from the new <WAP_SITE> directory created under Creating an Additional Website.
2. Open signon.wml in a text editor.
3. Find the line that includes the statement
href="/servlets/iclientservlet/peoplesoft8m/?cmd=login".
4. Change peoplesoft8m to the name of the new <WAP_SITE> directory.
5. Save the file.

Updating start.wml

Regardless of whether you created a new mobile website, update the start.wml file to enable your website to locate the PeopleSoft Mobile Sales for WAP Phones project.

To update start.wml:

1. Locate start.wml in the C:\Program Files\Apache Group\Apache\htdocs\peoplesoft8m\ (or corresponding WebLogic) directory.

If you created a website dedicated to PeopleSoft Mobile Sales for WAP Phones, use the start.wml file from the new <WAP_SITE> directory created under Creating an Additional Website.

2. Open start.wml in a text editor.
3. Find the line that includes the statement "ICScriptProgramName=."
4. Replace WEBLIB_MCD.MCD_MAIN with the following string:
WEBLIB_WAP.WAP_RSF_MAIN.
5. Save the file.

Creating an Application Server Domain

PeopleSoft recommends that you create an application server domain specifically for your PeopleSoft Mobile Sales for WAP Phones application.

For more information about creating application server domains, see the *PeopleSoft 8 Installation and Administration* guide for your database.

Configuring Security

PeopleSoft Mobile Sales for WAP Phones is delivered with a WAPSALES permission list that refers to all the internet scripts and component interfaces used by PeopleSoft Mobile Sales for WAP Phones. To authorize users to access the PeopleSoft Mobile Sales for WAP Phones, add the WAPSALES permission list to the roles to which you will assign your mobile sales representatives.

To add the WAPSALES permission list to a role:

1. Sign on to your PeopleSoft 8 CRM website with your web browser.
2. Select PeopleTools, Maintain Security, Use, Roles.
3. Specify a role.
For example, specify Field Sales Rep.
4. Click Permission List.
5. Click on a plus (+) sign to add a permission list.
6. Specify WAPSALES in the **Permission List** field, then press **TAB**.
7. Click **Save**.

Testing the Installation on a Phone Simulator

You can test your installation of PeopleSoft Mobile Sales for WAP Phones using a WAP phone simulator. PeopleSoft recommends using the UP.Simulator supplied with the Openwave Systems, Inc., (Phone.com) UP.SDK™ 4.1 for WML 1.1.

You can download the UP.SDK from the Openwave developer support website at <http://developer.openwave.com>.

Install the phone simulator by running the downloaded file and following the instructions provided.

To test your installation:

1. Start the application server and the web server.
2. Open the UP.Simulator.
3. Specify the URL for your web server.

Your default URL is as follows:

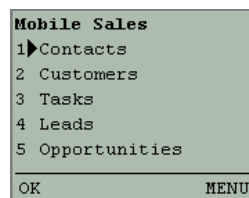
`http://<ServerName>:<PortNumber>/peoplesoft8m/signon.wml`. Port Number is not required unless you are running multiple web servers on the same machine.

If you created a website dedicated to PeopleSoft Mobile Sales for WAP Phones, replace `peoplesoft8m` with the name of the `<WAP_SITE>` directory created under Creating an Additional Website.

For example, if your server name is `WAPSERVER` and the website name is `WAP_SITE`, then your URL is `http://WAPSERVER/WAP_SITE/signon.wml`.

4. At the Mobile Sales signon card, specify the PeopleSoft CRM Sales user name and password.

Your installation is successful if the simulator logs into your PeopleSoft CRM Sales application and displays the main menu.



Simulator displays PeopleSoft Mobile Sales for WAP Phones main menu

Note. If you encounter problems while testing your installation, clear the phone simulator cache before testing again. To clear cache on an Openwave 4.1 simulator, choose **Edit, Clear Cache** from the simulator menu.

For more information on bookmarking your URL on a phone, see [Bookmarking Your URL on a Phone](#).

CHAPTER 3

Administering PeopleSoft Mobile Sales for WAP Phones

This chapter describes the tools available to the PeopleSoft Mobile Sales for WAP Phones administrator.

Logging and Tracing Error Messages

To assist in debugging problems that may occur, the PeopleSoft Mobile Sales for WAP Phones application writes messages to a log file, `psft.crm8.log`, located in the `<PS_HOME>\appserv\<domainname>\files` directory.

The message log provides information to assist in resolving problems that may occur in the PeopleSoft Mobile Sales for WAP Phones application. Whenever a significant unexpected event occurs, relevant data is written to the log file. Events that trigger a log entry include failed login attempts and concurrent update errors. New entries are added to the end of the file.

You can remove obsolete information or delete an obsolete file. If the file is deleted, a new one is created the next time a log entry is made.

Because the default logging level is 0 (none), the log file is not created until an error occurs.

For more information about logging levels, see the next section, [Setting the Logging Level](#).

Setting the Logging Level

You can specify the level of events logged by setting parameters in the `SwapInitialize` function in the `WEBLIB_WAP.WAP_RSF_MAIN.FieldFormula` section of the PeopleSoft Mobile Sales for WAP Phones PeopleCode. To change the destination of the log file, edit `&g_strLogFileName`. To change the log level, edit `&g_nLoggingLevel`.

Optional logging levels are as follows:

- **0 = None:** No messages are logged.
- **1 = Error:** Exceptions and serious errors are logged.
- **2 = Trace:** Exceptions, errors, and informational messages are logged.

Informational messages include trace level entries, warnings, and serious errors.

Reading the Log

The format of the log entry is as follows:

Severity::Origin::SubscriberID DateTimeStamp MessageText MessageCatalogNumber

The meaning of each entry follows:

- **Severity** can be either Error or Info.
- **Origin** is PC (PeopleCode).
- **Subscriber ID** represents the unique identifier applied to every wireless web phone or simulator session.
- **DateTime** is in the format CCYY-MM-DD-HH.MM.SS.
- **MessageText** is a description of what happened.
- **MessageCatalogNumber** represents the ID of this message in the PeopleTools Message Catalog.

Here is a sample log entry:

```
Error::PC::NAME_NAME.company. com 2001-01-19-13.12.08 Invalid user id or password for
XUser (18050,2)
```

Setting the Timeout Parameter

The default timeout setting for each user session on the web server is 1200 seconds (20 minutes). If a user's session lasts for longer than 20 minutes, the application sends the message "Your PeopleSoft session has expired," the session ends, and the user is returned to the PeopleSoft Mobile Sales for WAP Phones signon card.

You can set a different timeout by editing the value for the sessiontimeout parameter in the file named configuration.properties. You can find the configuration.properties file in the c:\program files\apache group\apache\psftdocs\<WAP_SITE> (Apache) or c:\weblogic\myserver\psftdocs\<WAP_SITE> (WebLogic) directory.

Note. The timeout function is disabled for cards with select (numbered) lists on Openwave (Phone.com) 3.1 microbrowsers. The function is fully enabled on Openwave 4.0 and 4.1 microbrowsers.

Some phones may also include a timeout feature. PeopleSoft recommends that you set the web server timeout to a smaller value than that for the phone.

CHAPTER 4

Using PeopleSoft Mobile Sales for WAP Phones

We use the Openwave simulator to illustrate our examples of PeopleSoft Mobile Sales for WAP Phones' functionality.



Wireless device displays PeopleSoft 8 sign-in screen

Keypad Usage

Different web-enabled wireless devices have different keypad designs and browser functionality; therefore, we discuss keypad usage and PeopleSoft Mobile Sales for WAP Phones navigation in general terms. Consult your device's documentation for further details.

In general, to enter a character, press the corresponding key until the desired character appears. For example, to type the letter *e*, press 3 twice in quick succession. To type the letter *z*, press 9

four times in quick succession. Usually, by default, the first letter of a word is capitalized and the following letters are lowercase. When you enter a character using the phone keypad, the character remains highlighted for a moment before the cursor advances automatically to the next space. Press the key until the desired character appears. You can wait for the cursor to advance automatically, or press the # pound key to advance to the next space.

Use your device's character control button to gain access to additional characters when presented with an entry field. Some common options include the following:

ALPHA or alpha	Uppercase or lowercase alphabetical characters.
NUM	Numeric characters.
SYM	Sets of special symbols.
SMART or smart	Uppercase or lowercase alphabetical characters followed by the numerals and special symbols available in a single scroll of each key.

Common Navigation and Display Functions

PeopleSoft provides several navigational tools to assist you in quickly moving from screen to screen.

Links	Appear throughout the application screens. Some devices display links in brackets [<i>link name</i>]; use your scroll or arrow key to move the cursor to the desired link, and select View or Link to activate the link. Other devices display a number next to the link; use your keypad to select the number of the desired link.
More	Indicates that additional items are available and transfers you to the next set when selected.
Sign Off	Prompts you to confirm that you want to end your PeopleSoft Mobile Sales for WAP Phones session. If you click OK , you are returned to the signon card..
Back	Usually appears in the bottom right corner of the card, unless overridden by the browser's character control button in a data entry card. Back returns you to the previous card. Most phones also have a dedicated (hardwired) Back button. Note. The Back button does not appear on some phone browsers if an input field is present. In this case, use the dedicated (hardwired) back button.
Main	Returns the user to the main Mobile Sales menu.

For more information about the Back button, see Using the Back Button .

Note. If the system returns one record in response to your request, it opens the record directly instead of requiring you to select it from a list of one.

Using the Back Button

Behavior of the **Back** button varies among different phones and versions of microbrowsers. For example, pressing **Back** as few as six times may return the user to the home deck (main screen) instead of to a card previously displayed. PeopleSoft Mobile Sales for WAP Phones enables direct return to the main menu from all detail and main edit cards with the **Main** option.

Signing On to PeopleSoft Mobile Sales for WAP Phones

You can override your default language settings for the sign-in screen. Click **Lang** to access the Language Selection screens.

Note. At this time, PeopleSoft Mobile Sales for WAP Phones supports only English. Do not select another language.

Language Selection Screens

Language:
▶ [English]
[Español]
[Français]
[Italiano]
[Deutsch]
Link

[Italiano]
[Deutsch]
[Français du Canada]
[Japanese]
[Portugués]
[Nederlands]
OK

Language selection screens

Scroll to the language that you want to define as your preferred language for the sign-in screen, and click the **Link** button. Click **OK** to return to the login screen without changing the preferred language.

Sign-in Screen

```

PeopleSoft 8 Sign-in
[Language:]
User ID:
|
OK          ALPHA

```

PeopleSoft 8 Sign-in screen

The sign-in procedure includes application security authentication.

To Log In

Enter a valid **User ID** and **Password**. (User IDs and passwords are case sensitive.) If an error occurs during the signon process, an error message appears.

Depending on the type of error that is generated, you may be prompted to select **OK** to return to the sign-in screen, or you may be returned to the sign-in screen automatically. (On some phones, you might need to scroll up or down in order to see the error message.)

```

ED@216.131.214.187 is
an Invalid User ID,
or you typed the
wrong password. User
ID and Password are
required and
OK

```

```

case-sensitive. Make
sure you're typing in
the correct upper and
lower case.
PeopleSoft 8 Sign-in
►[Language:]
Link

```

PeopleSoft 8 Sign-in Error screens

After signing in, the Mobile Sales main screen appears.

```

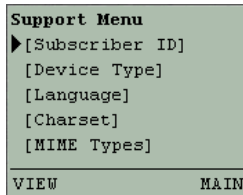
Mobile Sales
1►Contacts
2 Customers
3 Tasks
4 Leads
5 Opportunities
OK          MENU

```

Mobile Sales main screen

Using the Support Menu

Users of PeopleSoft Mobile Sales for WAP Phones can access a Support menu from the Main menu with the right options key on their phones (**MENU**). The Support menu provides information that may be useful if it is necessary to contact PeopleSoft technical support for assistance.



WAP phone displays PeopleSoft Mobile Sales for WAP Phones support menu

Users can select from the following options, then click **VIEW** to view the associated information:

- **Subscriber ID:** The unique identifier associated with the phone user. This can help identify log entries associated with a particular user.
- **Device Type:** The browser type and version, as well as the WAP gateway type and version.
- **Language:** The language defined for the phone (not as defined for the application). Phones purchased in different countries may have different languages defined.
- **Charset:** The character set used by the phone. This helps diagnose problems related to the phone's display of certain characters.
- **MIME Type:** Multipurpose Internet Mail Extensions (MIME) displays the MIME types supported by the phone, which should include Wireless Markup Language (WML).

Return Codes

Return codes displayed on the phone generally take the following form:

```
<message> (18050, y)
```

where

- *<message>* is a description of the situation encountered.
- *18050* identifies the PeopleSoft Mobile Sales for WAP Phones message set.
- *y* represents the PeopleSoft Mobile Sales for WAP Phones message number.

You can find descriptions of these messages in the Message Catalog by signing on to PeopleSoft CRM with a user ID authorized to view the Message Catalog. Select **PeopleTools, Utilities, Use, Message Catalog**.

Bookmarking Your URL on a Phone

To bookmark your PeopleSoft Mobile Sales for WAP Phones URL on your WAP-enabled phone, follow the directions provided with the phone. Bookmark the card that displays the PeopleSoft 8 sign-on user ID.

If you are using a Sprint PCS phone, you can add a bookmark by following instructions on the My Sprint PCS Wireless web site: <http://www.sprintpcs.com>.

CHAPTER 5

Developing for PeopleSoft Mobile Sales for WAP Phones

PeopleSoft Mobile Sales for WAP Phones is ready to be used out of the box without any modifications. However, there may be data that you would like to make available to users of PeopleSoft Mobile Sales for WAP Phones. This chapter provides the background required to make additional data or functions available to the PeopleSoft Mobile Sales for WAP Phones user.

Terminology

Wireless Application Protocol (WAP)	A communications protocol and application environment for the deployment of information resources, advanced telephony services, and internet access from mobile devices.
Wireless Markup Language (WML)	A structured Extensible Markup Language (XML) document template used to define the content that appears on a WAP-compliant mobile device. In HTML, a page is loaded into a browser and can be displayed using frames. A WAP device, on the other hand, loads not a page but a deck of cards. A WAP device displays only one card at a time, and the card contains both content and navigational controls.
Card	A WML document that contains both content and navigational controls. A WAP device displays only one card at a time.
Deck	A collection of cards that are sent to the WAP browser as a single unit. A compiled deck can not exceed approximately 1400 characters.

Required Tools and Skills

This section provides information about tools and skills required to develop for the PeopleSoft Mobile Sales for WAP Phones application.

Tools

Developing for PeopleSoft Mobile Sales for WAP Phones requires the following tools:

- PeopleTools 8.14 or later
- Openwave Systems, Inc., (Phone.com) UP.SDK 4.1 (or later) with phone simulator

You can download this tool from <http://developer.openwave.com>.

Skills

PeopleSoft recommends that the person who develops on the PeopleSoft Mobile Sales for WAP Phones application have the following skills:

- PeopleTools 8.1x Application Designer training and experience, including internet scripts (iScripts) and PeopleCode
- WML programming

Developing for PeopleSoft Mobile Sales for WAP Phones

This section provides architectural details on the structure of PeopleSoft Mobile Sales for WAP Phones. The information provided here is general, is intended to provide background architectural information, and acts as a guide to successful development for this application. PeopleSoft assumes that the developer has a good understanding of Application Designer, PeopleCode, PeopleCode internet scripts, component interfaces, and HTML objects. The developer should also have a general understanding of WML.

Good Development Practice

Never make changes directly to your production or test system. PeopleSoft recommends that you have your own development copy of the database so that your changes do not have any adverse effects on others using the system. Before changing PeopleCode, save the record under another name so that you can easily revert to the original code. Rename the saved copy and work with the original object.

For example, if you plan to change the WAP_RSFS_LEAD component interface, save it as WAP_RSFS_LEAD_SAVE, and make your changes to WAP_RSFS_LEAD. This way, you don't have to change the name of the component interface referred to in the PeopleCode. If you work on the copy, then you must change all references to the original component interfaces in the PeopleCode.

Working With the Component Interface

Using Application Designer, open the component interface on the object to which you will add the new data item. All of the component interfaces used by the PeopleSoft Mobile Sales for WAP Phones application include the prefix *WAP*. Find the field in the component interface that you want to add, drag it to the view on the right, and drop it there.

For example, to add the BUSINESS_UNIT field onto the Lead Detail card, open the WAP_RSF_LEAD component interface. Then locate the BUSINESS_UNIT field under the RSF_LEAD table, select it, and drag it to the view on the right. Then save the lead. This new property is now available in this component interface.

Working With PeopleCode and HTML Objects

To make the new field accessible from the WAP phone, modify the PeopleCode and HTML objects used for WML generation using Application Designer.

Ensure that you have PeopleTools 8.14 or later installed on the development workstation that you will use for your development.

All of the PeopleCode for PeopleSoft Mobile Sales for WAP Phones can be found in the WEBLIB_WAP.WAP_RSF_MAIN.FieldFormula PeopleCode program, except for the Convert_Lead_To_Opportunity function, which can be found in the FUNCLIB_RSF_WAP.CONVERT_LEAD_PB.FieldFormula PeopleCode program.

The object types supported in the PeopleSoft Mobile Sales for WAP Phones application are customers, contacts, leads, opportunities, and tasks. Each object type has one or more search cards, one or more list cards, and a detail card. The contact, lead, and opportunity objects each also have a main edit card and several property edit cards.

Modifying a List Card

This section describes how to modify a list card. Modify a list card when you want to display a new field on the list card. If the new field does not need to appear on a list card, then you can skip this procedure and instead modify the detail card.

Each list function uses two separate iScripts. The first iScript function gets the data and loads it into arrays defined with global scope. The second iScript function manages the data display and the grouping process for lists of items that cannot appear on a single card.

The list process can be broken down as follows:

1. Get the passed-in search criteria parameter.
2. Set the search criteria into the component interface.
3. Issue the component interface Find() method.
4. Create an empty array for the keys and another empty array for the data item that will appear on the list card for that item (for example, contact name).
5. For each item returned, load the key and data items into the corresponding array.
6. Invoke the display iScript.

Usually, this has the same function name, suffixed with *More*. For example, iScript_contactList and iScript_contactListMore. The display iScript displays the first card and provides a More item if more than nine items are in the list. When the More option is

selected, the next nine items appear. When the user selects an item to view, the key value is posted and the user is sent to the detail card for that item.

Adding an item to a list card may require changes in two places. First, insert the new data item into an array. This occurs inside the *for* loop of the get function (function name ends in *List*). Second, update the *for* loop inside the display function (function name ends in *ListMore*) that formats the WML for each item to appear in the list. Everything else in the list functions is generic and should not require modification.

Modifying a Detail Card

This section describes how to modify the detail function that displays the detail data for the item selected in the list card. You can also navigate to the detail card using a link from another detail card. The name of the detail card usually begins with the object name and ends with the string *Detail*. For example, the detail card for contacts is called `iScript_contactDetail`.

The detail function can be broken down as follows:

1. Retrieve the key values that were posted by the function that navigated here.

Any function that navigates to a detail card must post the keys needed to get the item.

2. Set the keys into the component interface and invoke the `Get()` for the detail card.
3. When formatting the data for display, use the `EscapeWML PeopleCode` function to properly escape any special characters embedded in the data.

HTML objects store the template for each card. The name of the HTML object for the contact detail card is `SWAP_CONTACT_DETAIL`. Although they are called HTML objects, the objects for the PeopleSoft Mobile Sales for WAP Phones application contain WML.

4. If you are adding a new data item to appear, add it to the bind variable parameter list in the function and add the new `%BIND(:n)` in the position where you want it to appear between the paragraph markers `<p>` in the HTML object.

HTML objects use bind variables to pass in variable information. Bind variables appear in HTML objects as `%BIND(:n)`, where *n* is the position of the variable passed in the `GetHTMLText` function.

5. For objects that have an update process implemented, use the accept key to navigate to the main edit card, which passes the key to the object.

Creating an Update Process for a New Object Type

1. Clone an existing update process to create an update process for a new object type.

For example, copy everything from the `contactEdit` function through the `contactSave` function, inclusive, then paste it just below the detail function for the object to which you are adding the update process. Edit each of the pasted functions, changing the function names to the newly updateable object. As you edit the newly pasted functions, comment out the code

inside the function using the “/* comment */” technique so that you can save the PeopleCode without generating errors.

2. Open the WAPSALES Permission List using Maintain Security and add the newly defined update functions to the list.
3. Open the HTML object main edit card and save it with the name of the newly updateable object type.

For example, if you are cloning contacts and creating an update process for customers, open the SWAP_CONTACT_EDIT HTML object and save it as SWAP_CUSTOMER_EDIT.

Modifying an Update Process

You can only update contacts, leads, and opportunities from PeopleSoft Mobile Sales for WAP Phones. Within each object, there is a main edit function plus a subordinate edit function for each item to be updated. Use the following information to guide you when adding a new data item for one of these object types or when implementing updates for one of the objects where updates are not currently implemented.

The update process consists of the following:

1. Get the object.

Get the posted key and invoke the Get method on the component interface.

2. Serialize the object.

Every object that can be updated has a Serialize function that copies the individual data items from the component interface into a rowset.

Serialization enables the object being updated to save across transactions. Component interfaces cannot be serialized across transactions, but rowsets can. If you add a new data item, add it to the Serialize function of the object.

If you add a new object type, define two new global rowset objects: one for the original version and the other for the updated version.

3. Format and display the main edit card.

If you have a new data item to display, add the logic to format and display the item in the main edit card. Update PeopleCode and the main edit card HTML object.

4. Display the subordinate edit card to capture new data.

If you add a new item, create a new iScript function to capture and post the new data, then navigate to the save function. If you create a new updateable object, create an edit function for each updateable item.

5. Get the posted data within the Save function and perform cross-field validations.

If you add a new data item, add the logic to the save function to get the posted data and

perform data validations on that data to ensure its integrity. If you create a newly updateable object, do the same for all updateable data items.

6. Set the validated data into the update rowset.

If all of the edits pass, set the posted data into the update rowset. The update rowset stores all of the updated data for this update process.

7. Get the object again and serialize it to a local rowset object to see if it has been changed since the beginning of this process.
8. Compare the current object with the original object serialized earlier in this process: If everything is the same, proceed with the update.

Because there is latency within this update process, make sure that another user has not updated the same data that is being updated.

If anything is different, end the update, display the concurrent update error, and navigate back to the main edit card to display the current version of the data. If you add a new data item, add this data item to the Compare function. If this is a newly updateable object, create a Compare function for this object (it should have been part of the cloning step performed earlier).

9. Deserialize the update rowset into the component interface: After passing all data validations and the concurrent update check, deserialize (copy) the updated data from the update rowset into the component interface on which the get operation was performed.

If this is a newly updateable object, create a Deserialize object function for this object (this should have been part of the cloning step performed earlier).

10. Invoke the Save method on the component interface.

If the save is successful, then navigate the user back to the main edit card. If the save was unsuccessful, display the error and return to the previous card.

Updating PeopleSoft Security

PeopleSoft Mobile Sales for WAP Phones is written in PeopleCode using secured objects called internet scripts (iScripts) and component interfaces. Before a user can run an internet script or component interface, the user must have authorization to access that object in PeopleSoft security.

Note. If you add a new internet script or component interface to the application, as described in this chapter, update the WAPSALES permission list to include the new item.

Access permission lists from the PeopleTools menu by selecting **Maintain Security, Use, Permission Lists**.

PeopleSoft Mobile Sales for WAP Phones is delivered with all iScripts and component interfaces authorized in the WAPSALES permission list. Add the WAPSALES permission list to each role that you would like to authorize to use the PeopleSoft Mobile Sales for WAP Phones application. Find the security item to update role permissions under the PeopleTools menu by selecting **Maintain Security, Use, Roles**.

For more information, see *Configuring Security*

Testing Your Modifications

To test your modifications:

1. Open the Openwave UP.SDK 4.1 phone simulator.
2. Enter your URL and sign on to PeopleSoft Mobile Sales for WAP Phones application.
3. Navigate to the card that you modified.
4. Check that all operations function properly.

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