Siebel

Self Service Administration Guide

February 2021



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Preface

This preface introduces information sources that can help you use the application and this guide.

Using Oracle Applications

To find guides for Oracle Applications, go to the Oracle Help Center at *http://docs.oracle.com/*.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program website*.

Contacting Oracle

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1 What's New in this Release

What's New In Siebel Self Service Administration Guide, Siebel CRM 21.2 Update

The following information lists the changes in this revision of the documentation to support this release of the software.

Topic	Description
Multiple topics	In Siebel CRM 21.2 update and later, in the Siebel Application Interface installation, Web artifacts for application configurations, which were formerly located in **`applicationcontainer\webapps\siebel`**, now map to **`applicationcontainer_external\siebelwebroot`**. The siebelwebroot directory contains subdirectories such as files, fonts, htmltemplates, images, migration, scripts, and smc.
Multiple topics	In Siebel CRM 21.2 update and later, the applicationcontainer directory has been replaced by two directories, as follows: • applicationcontainer_external (for Siebel Application Interface) • applicationcontainer_internal (for all other Siebel Enterprise components)

What's New In Siebel Self Service Administration Guide, Siebel CRM 20.5 Update

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

- The Oracle Policy Automation (OPA) product has been rebranded to Oracle Intelligent Advisor.

  > **Note:** Where *OPA* exists in the technical name of a workflow, parameter, business service, view, or object, the name remains as it is — that is, no rebranding has occurred for OPA in these instances.

- Rulebase has been renamed to Policy Model.

  > **Note:** Where *Rulebase/rule base* exists in the technical name of a business component user property, the name remains as it is — that is, no renaming has occurred for rulebase in these instances.

What’s New In Siebel Self Service Administration Guide, Siebel CRM 20.1 Update

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

What's New In Siebel Self Service Administration Guide, Siebel CRM 19.1 Update

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

2 About Siebel Self Service

About Siebel Self Service

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

- *Tasks for Customers on the Siebel Self Service Web Site*
- *Tasks for Customer Service Representatives in Siebel Self Service*
- *Features of Siebel Self Service*
- *Requirements for Installing Siebel Self Service*
- *About Deploying Siebel Self Service*

Tasks for Customers on the Siebel Self Service Web Site

Siebel Self Service 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 Self Service Web site:

- **Log in.** Customers who do not register on the Siebel Self Service 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 Self Service Web Site* and *Accessing the Siebel Self Service Web Site*. Customer service representatives can use Siebel Call Center to register customers on the Siebel Self Service 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 as tiles in a carousel (the Card mode). Customers use these links or tiles to navigate to a Web page where they can perform a task.

  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 Self Service Web site can update their profile information and passwords. For more information, see *Updating User Profiles*.
- **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 Self Service Web Site*.
- **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*.

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*.
- **Use Twitter.** Customers can use Twitter to communicate with your company and with other users of the Siebel Self Service Web site. For more information, see *Accessing Twitter on the Siebel Self Service Web Site*.
- **Manage service requests.** Customers who register on the Siebel Self Service 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 Self Service Web Site*.

Tasks for Customer Service Representatives in Siebel Self Service

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

- Review service requests that customers submit on the Siebel Self Service 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 Self Service 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 Self Service 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 Self Service

Siebel Self Service 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 Self Service*.
- **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 Self Service*.
- **Data visibility controls.** You can control the views and data that customers can see on the Siebel Self Service 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 Self Service*.

- **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*.

Note: Email notifications are not included in the preconfigured Siebel Self Service application, but you can implement this feature.

Requirements for Installing Siebel Self Service

The following items are required to install Siebel Self Service:

- **Database server.** For a list of supported database servers, including version and connectivity software information, see the *Siebel Installation Guide* , and see the Certifications tab on My Oracle Support.
- **Siebel Enterprise Server.** For a list of Siebel Enterprise Server requirements, see *Siebel System Requirements and Supported Platforms* on Oracle Technology Network.

For more information about installing Siebel Business Applications, see the *Siebel Installation Guide* for your operating system.

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 Self Service uses the Self Service Object Manager (*LANG*) component (SServiceObjMgr_*lang* alias) in the Siebel Call Center component group. The configuration file for Siebel Self Service is sservice.cfg. For information about the setup tasks that you must perform to deploy Siebel Self Service for an existing deployment that you originally installed for an earlier version, see *Siebel Installation Guide* .

About Deploying Siebel Self Service

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

Using Siebel Tools or Web Tools you can edit the Siebel Web Templates to change the layout. For example you might decide not to use the HTML frameset.

Using a text editor or an HTML authoring tool, you can change the cascading style sheets to integrate the appropriate company formatting. For example, you might change the background color or font size. For more information, see *Configuring Siebel Self Service*.

After the configuration of Siebel Self Service is complete, the application administrator can set up the functionality that customers can access on the Siebel Self Service Web site. For more information, see *Administering Siebel Self Service*.

After the configuration and administration tasks are complete, the application developer can work with the general Webmaster who can help integrate the Siebel Self Service Web site into your company Web site. For more information, see *Siebel Installation Guide* .

3 Setting Up Siebel Self Service

Setting Up Siebel Self Service

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

- *About Setting Up Siebel Self Service*
- *Roadmap for Setting Up Siebel Self Service*
- *About the Application Object Manager Components for Siebel Self Service*
- *Process of Adding the Application Object Manager Components for Siebel Self Service*

About Setting Up Siebel Self Service

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 (Siebel Innovation Pack 2017) in a new deployment (or as a new installation), you must perform all Siebel Server and Siebel Application Interface configuration. You do not have to perform the tasks described in this chapter.

  For more information about installing and configuring Siebel Server, see *Siebel Installation Guide* .

- If you install the current release (Siebel Innovation Pack 2017) as a migration installation for an existing Siebel CRM installation of an earlier version, then, you must perform the installation in an environment where there is a valid previous version installed. You must perform the tasks in this chapter. These tasks create the Application Object Manager components that Siebel Self Service uses for all installed and deployed languages.

  For more information about performing migration installations, see *Siebel Installation Guide* .

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.

Roadmap for Setting Up Siebel Self Service

To set up Siebel Self Service for an existing deployment, perform the following processes and tasks:

1. Review the information in *About Setting Up Siebel Self Service*.

   For more information about installing Siebel Self Service, see *Requirements for Installing Siebel Self Service*.
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* .

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 Self Service.

   For more information, see *Process of Adding the Application Object Manager Components for Siebel Self Service*.
5. Configure the Siebel Application Interface, as described in the *Siebel Installation Guide* .

About the Application Object Manager Components for Siebel Self Service

The Application Object Manager component for Siebel Self Service 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 Self Service*.

Configure the Siebel Application Interface, as described in the *Siebel Installation Guide* .

Process of Adding the Application Object Manager Components for Siebel Self Service

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

1. *Editing the new_comp_sia.dat File*.

   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*

   .

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 Self Service*.

Note: Perform this process only if it is required for your installation case. For more information, see *About Setting Up Siebel Self Service*.

This process is a step in *Roadmap for Setting Up Siebel Self Service*.

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 the procedure in this topic) and repeat the task in *Running the new_compdef_sia Script*.

This task is a step in *Process of Adding the Application Object Manager Components for Siebel Self Service*.

To edit the new_comp_sia.dat file

1. Stop the Siebel Server.
2. On the Siebel Server computer, navigate to SIEBSRVR_HOME/ bin/ lang.

   In this directory, SIEBSRVR_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.)
3. Back up the existing file new_comp_sia.dat.
4. 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.
5. 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:

      ```
      [CallCenter]

      FullName = Siebel Call Center

      Description = Siebel Call Center Components

      CreateDisabled = TRUE
      ```
6. 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 *SIEBSRVR_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 = SServiceObjMgr_ENU
Alias = PSSServiceObjMgr_ENU
Description = Siebel Self Service Object Manager
CompGrp = CallCenter
CompType = AppObjMgr
FixedParam: DataSource = ServerDataSrc
FixedParam: Lang = ENU
Param: LocaleCode = 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 = SelfService Definition
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
```

> **Note:** The information that you specify includes several required parameter settings for the component. You can use Siebel Server Manager to configure several of the parameter settings later, for example, to tune application performance.

7. Save the new_comp_sia.dat file.

   Next, run the new_compdef_sia script. For more information, see *Running the new_compdef_sia Script*.

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 Self Service 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*.

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* (but change the content that you specify in Step 6) and repeat this task.

This task is a step in *Process of Adding the Application Object Manager Components for Siebel Self Service*.

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/siebsrvr`. (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 siebelgatewayhost:tlsport
       siebelenterprise
       username
       password
       language
      ```

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

      ```
      ./new_compdef_sia.ksh siebelgatewayhost:tlsport
       siebelenterprise
       username
       password
       language
      ```

    In these commands, siebelgatewayhost is the name of the Siebel Gateway host, tlsport is the port number which is specified durng the gateway server installation, 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 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 sadmin 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.

    Configure the Siebel Application Interface, as described in the *Siebel Installation Guide* .

4 Configuring Siebel Self Service

Configuring Siebel Self Service

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

- *About Configuring Siebel Self Service*
- *About Configuring Oracle Knowledge for Siebel Self Service*
- *Configuring Siebel Self Service for Oracle Knowledge*
- *Configuring Siebel Self Service*
- *Configuration Tools for the Siebel Self Service Web Site*
- *Setting Up the Applet for Twitter*
- *Setting Up Customer Satisfaction Surveys*
- *Setting Up Autocreation of Attachments for Siebel Self Service*

About Configuring Siebel Self Service

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

- Configure Siebel business components, applets, views, and all other objects of Siebel Self Service 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.
- 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 Self Service is Siebel Service Portal. For more information, see *Configuring Siebel Open UI* .

About Configuring Oracle Knowledge for Siebel Self Service

Siebel Self Service is integrated with Oracle Knowledge so that customers can review information about programs on the Siebel Self Service 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 Self Service 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 Self Service Web site are stored in dedicated content channels of the Information Manager database in Oracle Knowledge. To integrate Siebel Self Service 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 Self Service 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*.

Configuring Siebel Self Service for Oracle Knowledge

Before you use Oracle Knowledge with Siebel Self Service, you must install a YUI library. This is required to render Oracle Knowledge content on Siebel Self Service home page.

To configure Siebel Self Service for Oracle Knowledge

1. Go to https://yuilibrary.com/yui/docs/yui/
2. Navigate to QuickStart, Download YUI*n* and download the latest version of YUI to your computer.
3. Extract the zip file, and in the extracted folder structure, go to Build, then YUI.
4. Locate the yui-min.js JavaScript file and save it to the following location on the Siebel Application Interface:

   `applicationcontainer_external\siebelwebroot\scripts\3rdparty`

5. Open Siebel Self Service, and access Oracle Knowledge.

   The Oracle Knowledge content renders correctly on the home page.

Configuring Siebel Self Service

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

Configuring Siebel Self Service 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 Self Service

1. Identify the Web pages, views, applets, and other objects of Siebel Self Service that you want to change.
2. Using Siebel Tools or Web Tools, change the Siebel Web templates as necessary to incorporate the appropriate company layout and formatting.
3. Using Siebel Tools or Web 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 Self Service.
    - 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. Deliver the change to the Integration Branch.
6. Test and debug the configuration.

Configuration Tools for the Siebel Self Service Web Site

Siebel Self Service includes a set of Siebel Web templates and style sheets that determine the look and feel of the Siebel Self Service Web site. You change Siebel Web templates and style sheets by using a text editor or an HTML authoring tool and Siebel Web templates using Siebel Tools or Web Tools. 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 or Web Tools. For information about working with Siebel Web templates, cascading style sheets, and controls, see *Using Siebel Tools* .

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

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

  View templates dictate how the applets are mapped or placed.
- 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 Web template is Applet Form Basic (CX sService).
    - **Detail Applet Web Template.** Defines the layout of a detailed form applet. This Web template is Applet Detail Form Self Service.
    - **Form Applet Web Template.** Defines the layout of a form applet. This Web template is Applet Form Layout.

    - **Form Base Applet Web Template.** Defines the layout of a form applet in an applet that can display forms or tiles. This Web template is Applet Form Layout Base.
- 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 Web template is OK List Applet.
- The following templates apply to tile applets:
    - **Tile List Applet Web Template.** Defines the layout of a tile list applet. This Web template is Applet List Tile sService.
    - **Vertical Tile List Applet Web Template.** Defines the layout of a tile list applet when the tiles appear vertically. This Web template is Applet Vertical Tile Self Service.
    - **Attachment Tile Applet Web Template.** Defines the layout of an attachment tile applet. This Web template is Applet List Tile - SR Attachments (CX sService).
- The following templates apply to other applets:
    - **Login Applet Web Template.** Defines the layout of the login applet. This Web template is Applet Login Self Service.
    - **Oracle Knowledge Search Applet Web Template.** Defines the layout of the Oracle Knowledge search applet. This Web template is OK Search Applet.
    - **Social Media Applet Web Template.** Defines the layout of a social media applet. This Web template is Applet Single Div.
- **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 Self Service Web site. For more information about using cascading style sheets to configure the appearance of the Siebel Self Service Web site, see *Configuring Siebel Open UI* .
- **Controls.** Determine how customers interact with the Siebel Self Service 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.

Setting Up the Applet for Twitter

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

1. *Obtaining a Twitter Widget*
2. *Displaying the Twitter Widget in Siebel Self Service*
3. *Designating the Height and Width of the Twitter Timeline*

Obtaining a Twitter Widget

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

Note: Siebel Self Service 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.
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:
   - **Search Query.** The search word or hashtag that the Twitter timeline shows (for example, #Oracle, #Siebel, #hadoop, and so on).
   - **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
   - **Height.** The height of the Twitter timeline.
   - **Theme.** The background color of the Tweets.
   - **Link color.** The color for the links that appear in the Tweets.

   After you provide these values, a preview of your timeline appears on your screen.
6. Click Create Widget.

   The following message appears: Your widget has been created.

   After the timeline preview, 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 Self Service*.
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,"script","twitter-wjs");</script>
   ```

   where:

   twitter-wjs is the widget ID.

You must 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 Self Service*.

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 Self Service

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

To display the Twitter widget in Siebel Self Service

1. In Siebel Tools, create a new workspace.
2. Create a Web template file with a name of Twitter.swt and an empty div element.

    The file content follows:

    ```
    <div>
    </div>
    ```

3. 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.get.ElementById ("widgetID#?)
    if(twtr){
    twtr.remove();
    twtr=null;
    }
    </script>
    ```

    where:

    widget ID is the widget ID that you note in Step 7 in the topic *Obtaining a Twitter Widget*.
    b. After the script tag, copy and paste the generated code that appears when you complete Step 6 in the topic *Obtaining a Twitter Widget*.
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 you created in Step 2.
    c. Add the applet to the view where you want Tweets to appear.
5. Deliver the changes to the Integration Branch.
6. Clear the browser cache, and re-start Siebel Self Service.

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 Self Service. 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

Setting Up Customer Satisfaction Surveys

The Siebel Self Service Customer Satisfaction survey allows you to obtain customer feedback through customer self-service means. Two types of surveys exist within Siebel Self Service:

- The general survey that solicits user feedback on the overall Web site experience.
- The Service Request survey that solicits feedback on a particular service request that the user has submitted. This type of survey is accessible through the Service Request's detailed view. You can analyze the survey results and generate a report with Siebel Call Center.

To modify the Siebel Self Service Customer Satisfaction Survey questions and labels, you need to use Siebel Tools to configure control properties of the Customer Survey applet. For instructions on how to administer the values contained in your Customer Satisfaction Survey, see *Administering Customer Satisfaction Surveys*.

To configure control properties

1. Launch Siebel Tools or Web Tools and create a new Workspace.
2. From the Object Explorer window, select Applet.

   The Applets window appears.
3. From the Applets window, query and select Customer Survey Applet (eService).
4. From the Object Explorer window, open the Applet object and select Control.

   The Controls window appears.
5. Select the control you want to change and edit its Caption field, which contains the survey label text.

   The changes you make here will be reflected in your user interface.
6. Deliver the changes to the Integration Branch.

Setting Up Autocreation of Attachments for Siebel Self Service

When filling out a service request, Siebel Self Service users can use the Description field to describe their issue. When the description is greater than the allowed number of words, Siebel Self Service automatically creates a text file attachment and stores the file. You can also map this Description field to any database column (such as the extension column) with a character maximum of any specified number, defined by the database table.

Note: Autocreation of attachments is designed to work when you enter the description in a new record. By default, the Description field is not editable. If you configure the product so the Description field is editable, the attachment is created only the first time that the Description field contains more than the allowed number of characters. If the user edits the description, the attachment is not changed, and there may be in an error indicating that the description is too long.

By default, the maximum length of the description field is 2,000 characters. To modify this functionality, use Siebel Tools to configure the Max Description Length user property of the Service Request (eService) business component, and specify a value for the maximum limit of characters for the auto file attachment creation. For instructions on mapping business component fields to database fields other than the default ones, see *Using Siebel Tools* .

Note: The Auto-created attachment file has the naming format: `<SR Number>_<Login Name>.txt`.

The feature to automatically create attachments is available for only the Service Request (eService) business component. You cannot copy and adapt this business component to implement this feature.

To configure max description length buscomp

1. In the Object Explorer window, select Business Component.

   The Business Components window appears.
2. From the Business Components window, query and select Service Request (eService).
3. From the Object Explorer window, open the Business Component User Prop object.

   The Business Component User Properties window appears.
4. Select the Value field, and edit the number as needed.
5. Deliver the changes to the Integration Branch.

5 Administering Siebel Self Service

Administering Siebel Self Service

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

- *About Administering Siebel Self Service*
- *About the Security Framework for Siebel Self Service*
- *Administering Navigation Links*
- *Process of Administering Web Access*
- *Configuring the Applets for Program Information*
- *Setting Up the Knowledge Base for Siebel Self Service*
- *Process of Setting Up Office Locations*
- *About Email Notifications*
- *Setting Up Information for Email*
- *Process of Administering Service Requests*
- *Setting Up Service Request Entitlements*
- *Process of Setting Up Email Notifications*
- *Setting Up Asset Management*
- *Administering Customer Satisfaction Surveys*

About Administering Siebel Self Service

After configuring Siebel Self Service, you perform the procedures in this chapter to set up the functionality that customers can access on the Siebel Self Service 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 Self Service Web site.

About the Security Framework for Siebel Self Service

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 Self Service* and *Access Control for Siebel Self Service*.

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

- **Anonymous use.** Set up the Siebel Self Service Web site to allow nonregistered customers limited access.
- **Registration.** Set up a means to allow nonregistered customers to register on the Siebel Self Service 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 Self Service

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

- **Anonymous customers.** Customers who do not register on the Siebel Self Service 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 Self Service 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 Self Service and an external authentication directory. With this support, the directory authenticates registered customers, and then the customers are authorized to access the Siebel Self Service Web site. For more information about customer management and authentication support, see *Siebel Security Guide* .

Access Control for Siebel Self Service

The following table describes the mechanisms you can use to control customer access to data.

Basis of Access	Access Control Mechanism
Application Functionality	Responsibility (Role)
Data Partitions	Organization

Basis of Access	Access Control Mechanism
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 Self Service

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* .

Administering Navigation Links

Customers can use navigation links on the Siebel Self Service 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 Self Service 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 Self Service 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. In the Navigate tab, click Site Map.
2. In the Navigation Links view, click the Administration - Application link.
3. In the Administration - Application menu, click the Navigation Links link.
4. In the Navigation Links view, click the plus icon (+) to add a record, and complete the fields 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 Self Service 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: ○ **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 Self Service Web site.
Active	Select this check box to show the navigation link on the Siebel Self Service Web site. Clear this check box to hide the navigation link on the Siebel Self Service 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	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 *Configuring Siebel Open UI* . Select this field only if you select a value of View Drilldown in the Action field. Values for this field follow: o **Null.** Select this value to not display the record count for the location to which the link navigates. o **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+. o **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+. 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: o If this system preference is Y, then: - 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. o If this system preference is N, then: - 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*.
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 Self Service, or select Siebel Service Portal to display the navigation link only in Siebel Self Service. If you select no value in this field, then the navigation link appears in all applications that include it.

Field	Comments

5. In the Applets list, click the plus icon (+) icon to add a record for each applet on the Siebel Self Service Web site in which you want the navigation link to appear.
6. 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.
7. 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.
8. Complete the fields 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*
2. *Registering Customers*
3. *Reassigning Passwords*

Note: Web access administration in Siebel Call Center is not included in the preconfigured Siebel Self Service 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*.

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*.

To register a customer

1. In the Side Menu, click Contacts.
2. In the Contacts Home menu, click Contacts List.
3. In the Contacts List view, click the plus icon (+) to add a new contact record, and complete the necessary fields.
4. Drill down on the Last Name field for the customer record.
5. Navigate to the Web Access view.
6. In the Web Access form, complete the fields 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 *Siebel Security Guide* .
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.

7. 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*.

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*.

To reassign a password

1. In the Side Menu, click Contacts.
2. In the Contacts Home menu, click Contacts List.
3. In the Contacts list, 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 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 Self Service is integrated with Oracle Knowledge so that customers can review information about programs on the Siebel Self Service 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 Self Service Web site. Administrators can configure criteria for the information that appears in these applets. For more information, see *About Configuring Oracle Knowledge for Siebel Self Service*.

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 described in the following table.

Field	Description
Applet Name	Select the name of the applet that you want to configure. For example, you might configure the following applets for a Siebel Public Sector Self Service Web site: o Ask a Question Applet (CX sService) o News Applet (CX sService) o News Search Applet (CX sService) o Service Programs Applet (CX sService)

Field	Description
	○ Service Programs Search Applet (CX sService) These applets are associated with a custom physical renderer. Any new applets that you create must use this custom physical renderer.
Channel Name	Type the name of the channel for the applet. For more information about applet channels in Oracle Knowledge, see *Oracle Knowledge Information Manager Administration Guide*.
Num Records	Type the maximum number of records that can appear in the applet.
Sort By	Select the field value by which records are sorted in the applet.
Type	Select the type of records to include in the applet. Values include: ○ **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.

Setting Up the Knowledge Base for Siebel Self Service

Siebel Self Service provides an integrated, searchable knowledge base through its solution literature and eSmartScript repository. Customer care representatives can use this knowledge base to provide consistent data and answers to customer questions. Customers can access the same answers themselves through Siebel Self Service.

Organizations can use Siebel Self Service to build a flexible knowledge base that consists of database records and files both inside and outside the Siebel Enterprise Application. Knowledge items such as solutions to problems, downloads, literature, and general documents can be searched using full-text searching. Customers can browse through a hierarchical library of categorized FAQs and eSmartScripts.

Setting Up FAQs for Siebel Self Service

To set up FAQs:

- Create the eService Catalog
- Set Up FAQs

Creating the Self Service Catalog

Siebel Self Service organizes the knowledge base through a catalog structure, which includes one or more categories. Before configuring FAQs or other solutions, you must define at least one catalog (named eService) and its associated categories. This catalog and associated categories will represent the structure in which your knowledge is organized, both internally and externally, for the customer.

For more information about creating catalogs and categories, including information about fields in the Catalog and Category records, see *Siebel eSales Administration Guide* .

To create the eService catalog and categories

1. From the application-level menu, choose View, Site Map, Catalog Administration, and then Catalog Administration.
2. In the Catalogs list, click New.
3. Fill in the fields in the Catalog record and the More Info form. Be sure to enter the name *eService* in the Name field.
4. Click the name of the catalog, which is a hyperlink.

   The Categories list for the catalog appears.
5. In the Categories list, add a new record for each of the categories of FAQs that you want displayed to customers using Siebel Self Service, and fill in the information for each.

Setting Up FAQs

To publish FAQs (that is, Siebel Solutions records) in Siebel Self Service, you must first create the FAQs and then categorize them in the appropriate Siebel Self Service catalogs. Once categorized, the FAQs will be rendered in the appropriate applets and views. Optionally, you can apply access control on the categorized FAQs to restrict access to certain categories.

To create an FAQ

1. From the application-level menu, choose View, Site Map, Solution Administration, and then Solutions.
2. In the Solutions list, click New.
3. Complete the necessary fields described in the following table.

Field	Description
Name	This title name will not be displayed but is merely for administration upkeep.
FAQ	In this field enter the FAQ question to be displayed to the end user.
Description	Enter the FAQ answer. There is a text limit of 2 KB in this field.
Type	Select Solution from this list to designate the record as an FAQ/Solution record.

To add FAQs to a Siebel Self Service category

1. From the application-level menu, choose View, Site Map, Catalog Administration, and then Catalog Administration.
2. In the Catalogs list, find and click the hyperlink for eService Catalog.

   The categories within the Siebel Self Service Catalog appear.
3. From the Categories list, select the category to which you want to add FAQs.
4. Click the Solutions view tab.

Any FAQs already associated with the selected category appear.

5. In the Solutions list, click New.

   The Add Solutions dialog box appears.
6. Query and select the desired FAQs, and then click OK.

   The selected FAQs are now associated with the selected category.

Notes About Setting Up FAQs

The following considerations apply when you set up FAQs:

- You may also create a new FAQ record if needed for the previous procedure.
- The general FAQs in Siebel Self Service must be categorized under the catalog named eService Catalog. FAQs categorized there will be rendered in the appropriate Siebel Self Service applets and views.
- The top FAQs in Siebel Self Service must be categorized under the catalog named eService Top Solutions and the category named eService Top Solutions. FAQs categorized under this catalog and category will be rendered in the appropriate Siebel Self Service applets and views. They are viewable under the Top FAQs list on the Siebel Self Service home page and the first drilldown view of the Browse the Knowledge Base link.

For further details on Catalog and Category administration, see *Siebel eSales Administration Guide* .

Setting Up Siebel eSmartScripts for Siebel Self Service

Siebel eSmartScript allows customers to engage in self-directed question-and-answer sessions that simulate the experience of talking with an expert. The sessions can have a predefined process flow, or the flow can be designed to change dynamically to reflect a customer's response. The process flow can also populate the Siebel database with customer input, creating service requests and completing applications.

Siebel eSmartScript is integrated with Siebel SmartScript, allowing the same troubleshooting scripts to be shared between the Siebel Self Service site and customer care representatives who use Siebel Call Center. Scripts can be created and administered using a select and move, flowchart-based design interface. Benefits include increased call quality, fewer data entry errors, and reduced training time.

For information on creating and working with eSmartScripts, see *Siebel SmartScript Administration Guide* .

> **Note:** Siebel eSmartScripts are rendered to end users as Troubleshooting Guides, accessible through the Troubleshoot Problems hyperlink on the Siebel Self Service home page or Instructions, accessible through the View Instructions hyperlink, also on the Siebel Self Service home page.

To add eSmartScripts to a Siebel Self Service category

1. From the application-level menu, choose View, Site Map, Catalog Administration, and then Catalog Administration.
2. In the Catalogs list, find and click the hyperlink for eService Catalog.
3. In the Categories list, select the category to which you want to add eSmartScripts.
4. Click the Troubleshooting/Access Instructions view tab.
5. In the Troubleshooting/Access Instructions list, click the menu button, and then click New Record.

   The Pick SmartScript dialog box appears.

6. Query and select the desired record, and then click OK.

   The selected eSmartScripts are now associated with the selected category.

Notes About Siebel eSmartScripts

The following considerations apply when you use Siebel eSmartScripts:

- The general eSmartScripts in Siebel Self Service must be categorized under the catalog named eService Catalog. Siebel eSmartScripts categorized under this catalog's categories will be rendered in the appropriate Siebel Self Service applets and views.
- Make sure that the eSmartScript you select is marked as Active. This can be done by making sure that the Active column contains a check mark.
- The top eSmartScripts in Siebel Self Service must be categorized under the catalog named eService Top Solutions and the category named eService Top Solutions. Siebel eSmartScripts categorized under this catalog and category will be rendered in the appropriate Siebel Self Service applets and views. They are viewable under the first drilldown view of the Troubleshoot Problems and the View Instructions links.

Setting Up Downloads, Documentation, and Product Literature

Siebel Self Service provides customers with access to all product documentation, product literature, and software downloads and updates (collectively referred to as Siebel literature). The literature can be provided in a variety of formats, including HTML, PDF, executable files, and dynamic link library files.

Customers who have registered their products can immediately access all the literature for their products without having to perform a search. From the Self Service portal, customers can select My Account, then My Products and see a list of all the products that they have registered. When customers click a product name, a list of all the literature linked to that product is immediately displayed.

Types of Literature

The literature displayed is organized by type. There are three types of literature:

- **Downloads.** For example, software patches and maintenance releases.
- **Documentation.** For example, product manuals.
- **Product Literature.** For example, white papers and data sheets.

Users can perform searches within each type of literature. For example, the customer can search through the list of software patches using a variety of criteria.

Customers can also access literature for products they have not registered. If anonymous users are allowed access to the system, they can also access literature. The quick links on home page of Self Service application has links for each literature type. The customer clicks the link for the literature type, and can then use a search feature to locate a literature item or select from the list that is displayed of the most popular literature items of that given type.

Making Literature Available to Customers

To make literature available to customers though Siebel Self Service, you must perform the following tasks:

- Add the desired item of literature to the literature catalog. You can specify a path, browse for a file, or link to the file through a URL.
- Provide a name for the literature item.

- Specify the type of literature that has been added (documentation, download, or product literature).
- Associate the literature item with either a product or a catalog category. Failure to establish at least one association prevents Self Service customers from accessing the item. (For further details on Catalog and Category Administration, see *Siebel eSales Administration Guide* .)

To add Literature Items to Siebel Self Service

1. From the application-level menu, choose View, Site Map, Document Administration, and then Literature.
2. From the Literature form, click New. A blank line is added in the list.
3. Complete the fields described in the following table.

Field	Description
Name	The title of the literature item. This name is displayed to the customer in Siebel Self Service.
File Name	Clicking in this field displays a select button. Click select and the Add Attachment window appears. You can type the full path of the file or click the browse button to navigate to the file and select it. Alternatively, if the file is available on a Web server, you can select the file by specifying its URL in the URL field.
Description	Information about the literature.
Literature Type	Clicking this field provides a list which contains other values that are not used in literature administration. You must select one of the three literature types: documentation, product literature, or downloads. Do not select any of the other literature types from the list. They are used by other Siebel applications.

Once you have added the literature item, the item should be associated with a product or a category of the eService Category Catalog.

To associate literature with a product

1. Make sure that the item of literature is selected in the list in the Literature list applet.
2. Select the More Info tab if it is not already selected.
3. Click the select button in the Products field.

   The Associated Products window appears.
4. Click New. A list of products appears.
5. Query and select one or more products to associate with the literature item.

   If desired, you can also associate literature with a Siebel catalog category. (For more information on Catalogs and Categories, see *Siebel eSales Administration Guide* .)

To associate literature with a catalog category

1. Select the literature item from the list in the Literature form.
2. Click the Category tab in the literature applet. If the literature is already associated with any catalog categories, the categories are displayed in the list.
3. Click New.

   The Add Subcategories window appears.

4. Query for any of the eService Catalog Categories.

Note: Siebel Self Service is preconfigured to display items only in the eService Catalog categories.

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*
2. *Creating Divisions for Office Locations*
3. *Creating Categories for Office Locations*
4. *Creating Office Locations*
5. *Linking Search Results to Map Services*

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. The following table describes the required data for this database table.

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

You can import a maximum of 2,000 geocode data records for each Import command on Siebel Call Center. You must store the geocode data in a file that contains the column heading information in the previous table.

> **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 *Setting Up the Knowledge Base for Siebel Self Service*.

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 *Setting Up the Knowledge Base for Siebel Self Service*.

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 fields 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 *Setting Up the Knowledge Base for Siebel Self Service*.

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 fields 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 Self Service, 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 *Setting Up the Knowledge Base for Siebel Self Service*.

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 fields 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*.
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.

Field	Comments
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*.
Address	Select the address for the office.

Linking Search Results to Map Services

In the preconfigured Siebel Self Service 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 *Setting Up the Knowledge Base for Siebel Self Service*.

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 Self Service application, but you can implement this feature. For more information, see *Setting Up Service Request Entitlements*.

You use Siebel Workflow to define the business rules that automate business processes and procedures. Siebel Self Service 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* .

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 Self Service 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 Accounts list, add a record, and complete the fields described in the following table.

Field	Comments
Account	Type the name of the account. Customers see this name in the list for the To field of the email form in the Contact Us view of the Siebel Self Service Web site when both of the following conditions are met: o The customers are associated with the organization for the account. o 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.

Field	Comments
	When you select or create an address record, the other fields in the Email, Fax and Mail Accounts list are populated with the data from that record. If an existing record in the Company Addresses dialog box has no values or incorrect values in the fields for the email address, telephone number, or fax number, then you can change the values for these fields in the dialog box.
Email	Displays the email address for the address that you select or create in the Company Address dialog box.

3. Navigate to the Email Subjects view.
4. Add an email subject record, and complete the fields 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*
2. *Creating Solutions*
3. *Associating Solutions with Service Requests*
4. *Associating Attachments with Service Requests*
5. *Setting Up Service Request Entitlements*

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 Self Service Web site.

This task is a step in *Process of Administering Service Requests*.

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 fields 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 Self Service 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 Self Service Web site.
Status	Displays the status of the activity. This field does not affect the update to the service request on the Siebel Self Service 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*.

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 fields 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.

Field	Comments
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 Self Service 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 Self Service Web site.

This task is a step in *Process of Administering Service Requests*.

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 fields 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 Self Service Web site.

This task is a step in *Process of Administering Service Requests*.

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 fields 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.

Setting Up Service Request Entitlements

Siebel Self Service provides service entitlement verification of registered users in addition to the standard contact authentication at login. If entitlement verification is active when a user tries to create, update, or view a service request, the application verifies that the user is a contact for a valid service entitlement. Without valid entitlement, users will not be able to create, modify, or view any service requests, including ones they may have previously created. Whether you implement entitlement verification depends on your business model.

If registered users receive different levels of support depending on their service entitlements, then entitlement verification is appropriate. If all registered users receive the same level of support, then entitlement verification is probably not necessary.

Entitlement verification of a registered user consists of the following:

- The registered user's Contact record must belong to the contacts list of an entitlement.
- The entitlement must currently be valid, that is, not expired.
- For a contact to be able to create or modify service requests, that contact must be added to a valid entitlement.

> **Note:** A contact can only be added to an entitlement by an administrator or customer care representative in the host company. A Web Delegated Customer Administrator does not have access to the Entitlement Contacts table.

Entitlement verification is found in the SWE section of \bin\sservice.cfg file in the directory for the Siebel Server. Entitlement verification is set to FALSE by default.

To enable or disable entitlement verification

1. Open the \siebsrvr\bin\sservice.cfg file in the Siebel Server directory in any text editor.
2. Locate the line beginning with `Entitlement=`
3. Replace the current setting following the = sign to FALSE to disable entitlement verification, or to TRUE to enable entitlement verification.
4. Save sservice.cfg, retaining its format as a text file.
5. Reboot your Siebel Server service to have the new entitlement verification setting take effect.

To add a contact to an entitlement

1. From the application-level menu, choose View, Site Map, Agreements, and then All Agreements Across Organizations.
2. In the Agreements list, select the agreement to which the entitlement belongs and click the Name hyperlink.

   The Agreement form appears.
3. Click the Entitlements view tab.

   The Entitlements list appears.
4. In the Entitlements list, select an existing entitlement from the current agreement.

   Make sure that the Start Date and End Date fields are filled with the appropriate values in the new or existing Entitlement.
5. Complete the necessary fields.
6. Click the Contacts view tab.
7. In the Contacts list, click the menu button, and then click New Record.

   The Add Contacts pop-up list appears.
8. In the pop-up list, select a contact, and then click OK.
9. In the Contacts list, select the Internet check box to activate the Internet flag.

   Activating the Internet flag enforces the Entitlement on the Internet Channel, which in this case is Siebel Self Service.

Note: You may also create a new record or new entitlement as needed in the previous procedure.

Process of Setting Up Email Notifications

To set up email notifications, perform the following tasks:

1. *Setting Up Service Request Entitlements*
2. *Enabling Component Groups and Policies for Email Notifications*
3. *Designating Customers for Email Notifications*
4. *Changing Parameters for Generate Triggers Component*
5. *Starting the Task for Generate Triggers Component*
6. *Changing Parameters for Workflow Monitor Agent Component*
7. *Starting the Task for Workflow Monitor Agent Component*

Setting Up Email Notification for Siebel Self Service

Using Siebel Workflow, you can define business rules that will automate your business processes and procedures. For example, you may want to send email notification to alert a customer when the status of an open service request is changed or when a solution has been associated with the service request by a Call Center agent. Another example would be escalating a service request that has been outstanding for longer than one week by sending an email notification to the Call Center manager.

Siebel Self Service provides four sample Workflow policies that will send email notifications to customers:

- **Siebel eService Activity Policy.** Send email when a new activity is added to a Service Request.
- **Siebel eService Attachment Policy.** Send email when a new file attachment is added to a Service Request.
- **Siebel eService Registration Request Policy.** Send email containing the UserID and Password.
- **Siebel eService Service Request Update Policy.** Send email whenever a Service Request Status gets updated.

These Workflow policies are samples that are shipped with Siebel Self Service. You may have to modify the Workflow Policy conditions to suit your business model.

> **Note:** In addition to performing the following procedures, you must enable Email Manager for these email notifications to work. For information about Email Manager, see *Siebel Business Process Framework: Workflow Guide* .

To set up email notification

1. From the application-level menu, choose View, Site Map, Server Administration, and then Component Groups.
2. Make sure the following component groups are enabled:
   - Communications Management
   - Workflow Management
3. Stop and restart your Siebel Server.
   Siebel Workflow Manager will now actively monitor your Workflow policies that are online and perform the appropriate actions. The actual sending of the email notification step will be executed by Siebel Communication Manager, which interfaces with your SMTP mail server.
4. From the application-level menu, choose View, Site Map, Business Process Administration, and then Workflow Policy Group.
5. In the Policies Groups list, select the eService Group record.
   The following policies appear in the Policies lists:
   - eService Activity Policy
   - eService Attachment Policy
   - eService Registration Request Policy
   - eService Service Request Update Policy
6. In the Policies list, verify that each record contains the following information:
   - An Activation field that is blank or contains a value that is not later than the date and time of your testing.
   - An Expiration field that is blank or contains a date and time that has not already passed.
7. From the application-level menu, choose View, Site Map, Contacts, and then All Contacts across Organizations.
8. Find a contact name and type an appropriate address in the Email field (for example, jdoe@yourcompany.com).

9. Click on the Contact record hyperlink, and then click the more/less button in the Contact form.
10. Click the Send Email Updates check box.

Once the component groups have been enabled and you have selected the contacts who will receive email updates, you need to change the parameters that generate triggers for the updates.

To change parameters that generate triggers

1. From the application-level menu, choose View, Site Map, Server Administration, and then Components.
2. In the Server Components list, find and select Generate Triggers.
3. Click the Component Parameters view tab.
4. From the Component Parameters list, change the following parameter values:
    - EXEC to TRUE.
    - SQLFlags to 1.
    - TraceFlags to 1.

After you change the parameters, you need to log into Server Manager and start the task for component Generate Triggers.

To start the task for component Generate Triggers

1. From the Command Prompt, log in to Server Manager, using the following structure:

   `srvrmgr /e` <enterprise name> `/g` <gateway server name> `/u` <database user name> `/p` <db passwd>
2. Start the task for component Generate Triggers, using the following command:

   srvrmgr> start task for comp GenTrig with Exec="TRUE", privuser="<Tableowner_name>", privuserpass="<Table_password>"

   > **Note:** Substitute the italicized <Tableowner_name> with your database table owner name, and <Table_password> with your database table password.

   For more details, see *Siebel Business Process Framework: Workflow Guide* .
3. From Server Manager, type the following:

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

   > **Note:** Wait until the status of the GenTrig becomes completed before returning to the Call Center for the following step.

To change parameter for Workflow Monitor Agent

1. From the application-level menu, choose View, Site Map, Server Administration, and then Components.
2. In the Server Components list, find and select Workflow Monitor Agent.
3. Click the Component Parameters view tab.
4. From the Component Parameters list, change the following parameter values:
    - ActionInterval to 1.
    - Group Name to eService Group.
    - Actionagent to FALSE.

- SQLFlags to 1.
- TraceFlags to 1.

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

To start the task for component Workflow Monitor Agent

1. From the Command Prompt, log in to Server Manager, using the following structure:
   `srvrmgr /e` <enterprise name> `/g` <gateway host name> `/u` <database user name> `/p` <db passwd>
2. Start the task for component Workflow Monitor Agent, using the following command:
   ```
   srvrmgr> start task for comp WorkMon with tableownpass='db2'
   ```
   > **Note:** This example is for DB2UDB database. For Oracle, use `tableownpass='<the table owner's name>'`. For MS SQL, use `tableownpass='MSSQL'`.
3. From Server Manager, type the following:
   ```
   srvrmgr> list task for comp WorkMon
   ```
4. Log out of Server Manager and return to Siebel Call Center.

Adding Additional Contacts for Email Notification

After you have performed all the steps for setting up email notification, you can add additional contacts simply by selecting the Send Email Updates checkbox. You do not have to re-run Generate Triggers or stop and start the Workflow Monitor Agent task.

To add additional contacts for email notification

1. From the application-level menu, choose View, Site Map, Contacts, and then All Contacts across Organizations.
2. Find a contact name and type an appropriate address in the Email field (for example, jdoe@yourcompany.com).
3. Click on the Contact record hyperlink, and then click the more/less button in the Contact form.
4. Click the Send Email Updates check box.

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 *Setting Up Service Request Entitlements*.

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 Self Service 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 *Setting Up Service Request Entitlements*.

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 *Setting Up Service Request Entitlements*.

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 *Setting Up Service Request Entitlements*.

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 host 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", privuser="Tableowner_name",
privuserpass="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 *Setting Up Service Request Entitlements*.

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*.

This task is a step in *Setting Up Service Request Entitlements*.

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.

Setting Up Asset Management

Siebel Asset Management allows users to register their newly purchased products, access warranty information, and view product news and recommended product services.

To set up asset management, perform the following tasks:

- *Setting Up Warranties*
- *Setting Up Product News*
- *Setting Up Recommended Services*

Setting Up Warranties

To include Product Warranties, you must first create warranties, and then associate those warranties with products. You may or may not choose to associate default warranties with products. To work with warranties you must be in the Siebel Call Center client.

Creating Specific Warranties

To create specific warranties, you:

- Set up the warranty.
- Associate the specific warranty with a user asset.

For information about setting up warranties, see *Siebel Field Service Guide* .

To associate specific warranties with user assets

1. From the application-level menu, choose View, Site Map, Assets, and then All Assets Across Organizations.
2. In the Assets list, select the user asset you would like to link to a warranty.

   Note: You may need to query on the asset name or serial number.
3. Click the Warranty view tab and Click New.
4. In the Name field, click the select button.

   The Pick Warranties dialog box appears.
5. In the Pick Warranties dialog box, select a warranty and click OK.
6. Enter or edit the Start Date and End Date field values if needed.

Note: When you select a warranty, the Start Date and End Date fields will automatically populate if the warranty has a Start Date Type field value and the asset has a Purchase, Ship, Registered, or Install Date value.

Creating Default Warranties

To create a default warranty, you:

- Set up the default warranty
- Associate products with the default warranty

To set up a default warranty

1. From the application-level menu, choose View, Site Map, Service Administration, and then Warranties.

   The Warranties screen appears.
2. In the Warranties list, click New.
3. Complete the fields described in the following table.

Field	Comments
Type	Use this drop-down list to choose what you want to associate your product with. Choose Product to associate your warranty to a product.

Field	Comments
Start Date Type	Use this drop-down list to set the time at which your product warranty will go into effect. Siebel Self Service will automatically associate a warranty to a product if the Start Date Type=Purchase Date. Selecting Purchase Date will make sure that your warranty will take effect on the date the product is purchased.
Duration (Days)	This is the number of days the warranty will be in effect.
Provider	This select button invokes a dialog box from which you may choose a warranty provider.

Once the following steps are completed, Siebel Self Service users will be able to view the default warranties associated with their newly registered products in their registered product detail view.

To associate products with a default warranty

1. From the application-level menu, choose View, Site Map, Service Administration, and then Warranties.
2. In the Warranties list, select your new default warranty.
3. Click the Products view tab and click New.

   The Add Internal Products dialog box appears.
4. Select the product to be associated with the selected warranty and click OK.

   The products are associated with the default warranty.

> **Note:** To add more than one product, press CTRL while selecting the products in the Add Internal Products dialog box.

Setting Up Product News

To allow users to view news about their registered products:

- Publish product news
- Link product news to products

To publish product news

1. From the application-level menu, choose View, Site Map, Solution Administration, and then Solutions.

   The Solutions list appears.
2. In the Solutions list, click New.
3. Complete the fields described in the following table.

Field	Comments
Name	The value entered into this field will not be displayed to the user. This value is used only to facilitate administrative upkeep.
Description	This field has a 2 KB text limit.
Type	Select Product News from the drop-down list to classify the solution as a product news record.
Status	Select the value which reflects the status of your record.
Publish Internal, Publish External	These two check boxes allow you to designate the record for viewing internally, (that is, within your organization), externally, (that is, publicly on your Siebel Self Service Web site), or both internally and externally.

When you link a Product News record to a product, customers who have registered the product can view the product news record in Siebel Self Service.

To associate product news with products

1. From the application-level menu, choose View, Site Map, Product Administration, and then Product Administration.

   The Products list appears.
2. In the Products list, select the product to be linked with product news.
3. In the More Info view tab, select Product News from the Show drop-down list.
4. In the Product News list, click New.

   The Pick Product News dialog box appears.
5. Select a product news record to link to the product and click OK.

Setting Up Recommended Services

To allow Siebel Self Service users to view newly added recommended services linked to their registered products, or assets, in Siebel Self Service:

- **Create a recommended service.** The recommended service is created in the product administration view. Technically, it is another product that you are trying to sell to customers who have already bought products.
- **Link the recommended service with products.** After you link the recommended service to a product, customers who have registered the product can view the recommended service in Siebel Self Service.

To create a recommended service product

1. From the application-level menu, choose View, Site Map, Product Administration, and then Product Administration.

   The Products list appears.
2. In the Products list, click New.
3. In the More Info view, complete the necessary fields, including the Product and Description fields.

   A sample Product could be `1-Year Service Maintenance`, and a sample Description could be `Install latest software upgrade.`

To link recommended services with products

1. From the application-level menu, choose View, Site Map, Product Administration, and then Product Administration.

   The Product list appears.
2. In the Product list, find and select the product to be linked with a recommended service product.
3. In the More Info view, click the menu button and select Related Products.
4. In the Related Products view, click New.

   The Add Internal Products dialog window appears.
5. From the Add Internal Products dialog window, select a Recommended Service product and close the window.
6. In the Relation field, select Recommended Service.
7. In the Product screen, click Save.

Administering Customer Satisfaction Surveys

The Siebel Self Service Customer Satisfaction survey allows you to obtain customer feedback. The survey is a Web-based form linked to Web pages in which a customer has closed a service request. The customer can fill out the form, submit it, and your company can analyze the results.

You can modify the list of selectable responses for each survey question in the Siebel Call Center client. For instructions on how to configure control properties of the Customer Satisfaction Survey, see *Setting Up Customer Satisfaction Surveys*.

To administer a customer satisfaction survey

1. From the application-level menu, choose View, Site Map, Application Administration, and then List of Values.
2. Click Query.
3. Type `cs_*` in the Type field and click Go.

   A list of customer satisfaction values appears.
4. Modify the existing values in the fields described in the following table as needed.

Field	Comments
Displayed Value	The answer that will appear in the drop-down list of values.

Field	Comments
Order	The order in which the answer will appear in the drop-down list of values. Enter 1 if you want the value to appear first on the list, and so on.
Active	This field must be checked for the record to be active.

6 Using Siebel Self Service

Using Siebel Self Service

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

- *Managing User Profiles on the Siebel Self Service Web Site*
- *Accessing the Siebel Self Service Web Site*
- *Obtaining Program Information on the Siebel Self Service Web Site*
- *Contacting the Web Site Host*
- *Accessing Twitter on the Siebel Self Service Web Site*
- *Managing Service Requests on the Siebel Self Service Web Site*

Managing User Profiles on the Siebel Self Service Web Site

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

- *Registering on the Siebel Self Service Web Site*
- *Updating User Profiles*

Registering on the Siebel Self Service Web Site

If customers do not register on the Siebel Self Service 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 Self Service 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 Self Service 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 end 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 Self Service 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 the save icon.
   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 Self Service Web Site

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

- *Logging In to the Siebel Self Service Web Site*
- *Obtaining a New Password*

Logging In to the Siebel Self Service Web Site

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

To log in to the Siebel Self Service 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 Self Service Web Site

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

To log out of the Siebel Self Service Web site

1. Click the Settings icon at the start 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 Self Service automatically creates these new passwords, and customers can change these passwords after they use them log in to the Siebel Self Service 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 a screen with a temporary password appears.
4. Note your temporary password, and click Close.

   The home page appears again.

Obtaining Program Information on the Siebel Self Service Web Site

Both registered customers who enter a user name and password to access the Siebel Self Service 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*
- *Reviewing Program Information*
- *Reviewing News Articles*

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*.

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 after 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*.

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*.

Contacting the Web Site Host

Both registered customers who enter a user name and password to access the Siebel Self Service 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*
- *Sending Email to the Web Site Host*

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 the fields 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.
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.

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

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 Self Service 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.
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 Self Service Web Site

Both registered customers who enter a user name and password to access the Siebel Self Service 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 start of the Twitter applet. For information about setting up the Twitter applet on the Siebel Self Service Web site, see *Setting Up the Applet for Twitter*.

To access Twitter on the Siebel Self Service 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 beside 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 Twitter applet.

Managing Service Requests on the Siebel Self Service Web Site

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

- *Submitting Service Requests*
- *Adding Attachments to Service Requests*
- *Adding Updates to Service Requests*
- *Viewing Solutions for Service Requests*

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 start of the page, followed by the 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 page, 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 start of the page, followed by the 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 start of the page, followed by the 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 Workflows for Siebel Self Service

Workflows for Siebel Self Service

This chapter includes information about the workflows for Siebel Self Service. It includes the following topics:

- *Workflows for Registration*
- *Workflows for Interview Sessions*
- *Workflows for Cases*

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

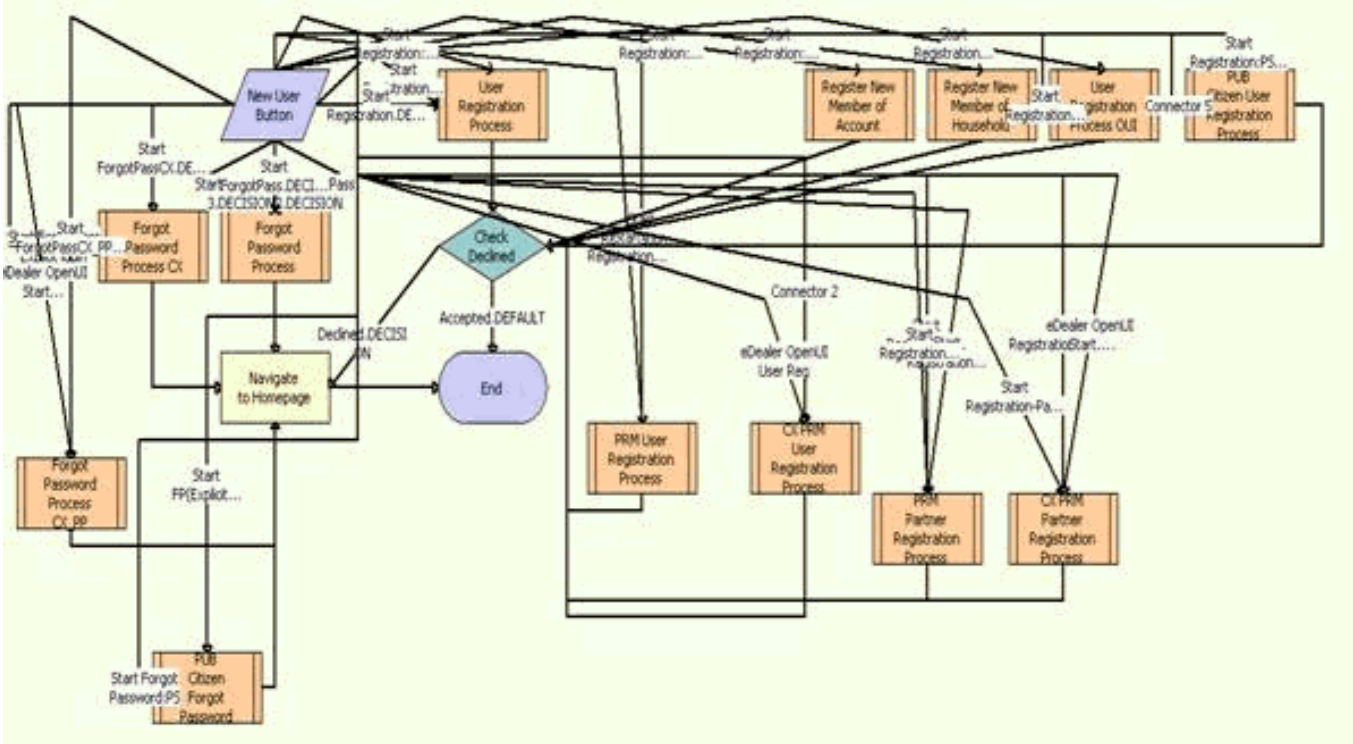
This group of workflow controls user registration for Siebel Self Service. It includes the following workflows:

- *User Registration Initial Process Workflow*
- *User Registration Process OUI Workflow*
- *PUB Citizen User Registration Process Workflow*
- *User Registration SubProcess OUI Workflow*
- *User Registration Forgot Password (CX eService) Workflow*
- *PUB Citizen User Registration Forgot Password Process Workflow*

User Registration Initial Process Workflow

This workflow calls other workflows that complete the registration process for a customer. The following figure 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 Self Service Web site.



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

Workflow Description.

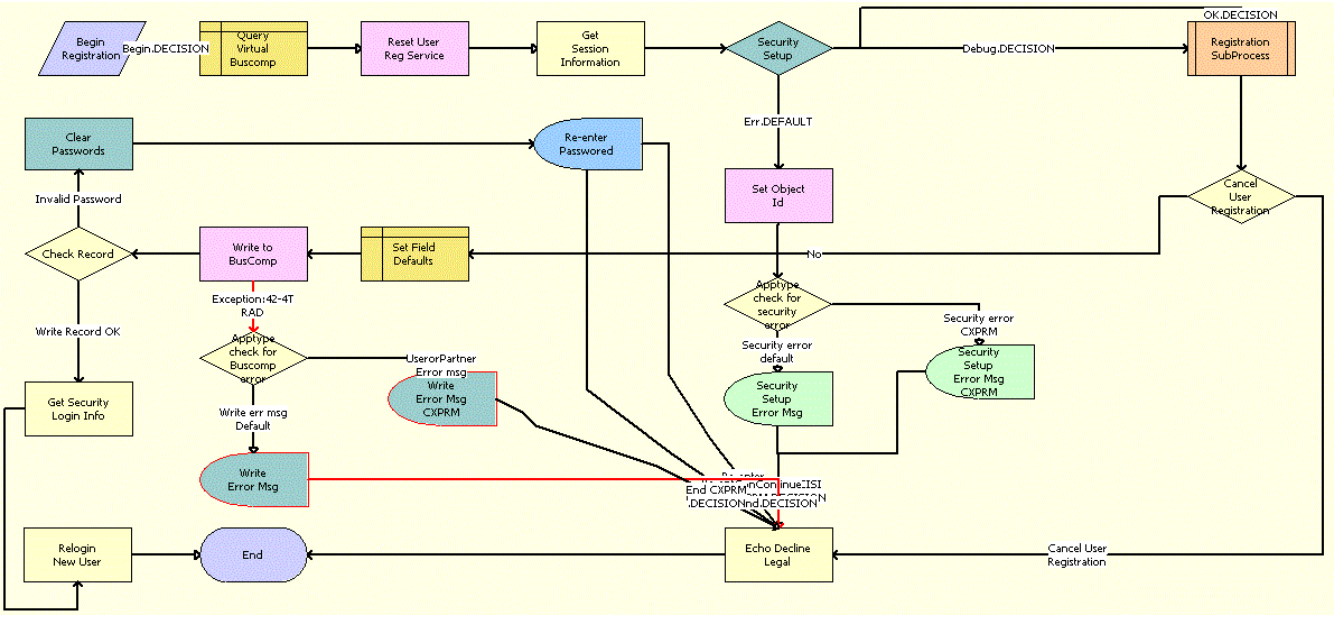
This workflow performs the following actions:

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 Self Service Web site. For more information, see *User Registration Process OUI Workflow*.
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 Self Service Web site. For more information, see *PUB Citizen User Registration Process Workflow*.
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 Self Service Web site. For more information, see *PUB Citizen User Registration Forgot Password Process Workflow*.
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 Self Service Web site. For more information, see *User Registration Forgot Password (CX eService) Workflow*.
6. **Navigate to Homepage.** This step navigates to the home page of the Siebel Self Service 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. The following figure shows this workflow.

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



Note: This workflow includes steps that apply to customer registration on Web sites other than the Siebel Self Service Web site, such as the partner portal Web site. Because this guide documents the functionality for Siebel Self Service, only the workflow steps that apply to the Siebel Self Service Web site 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*.

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 Self Service Web site.

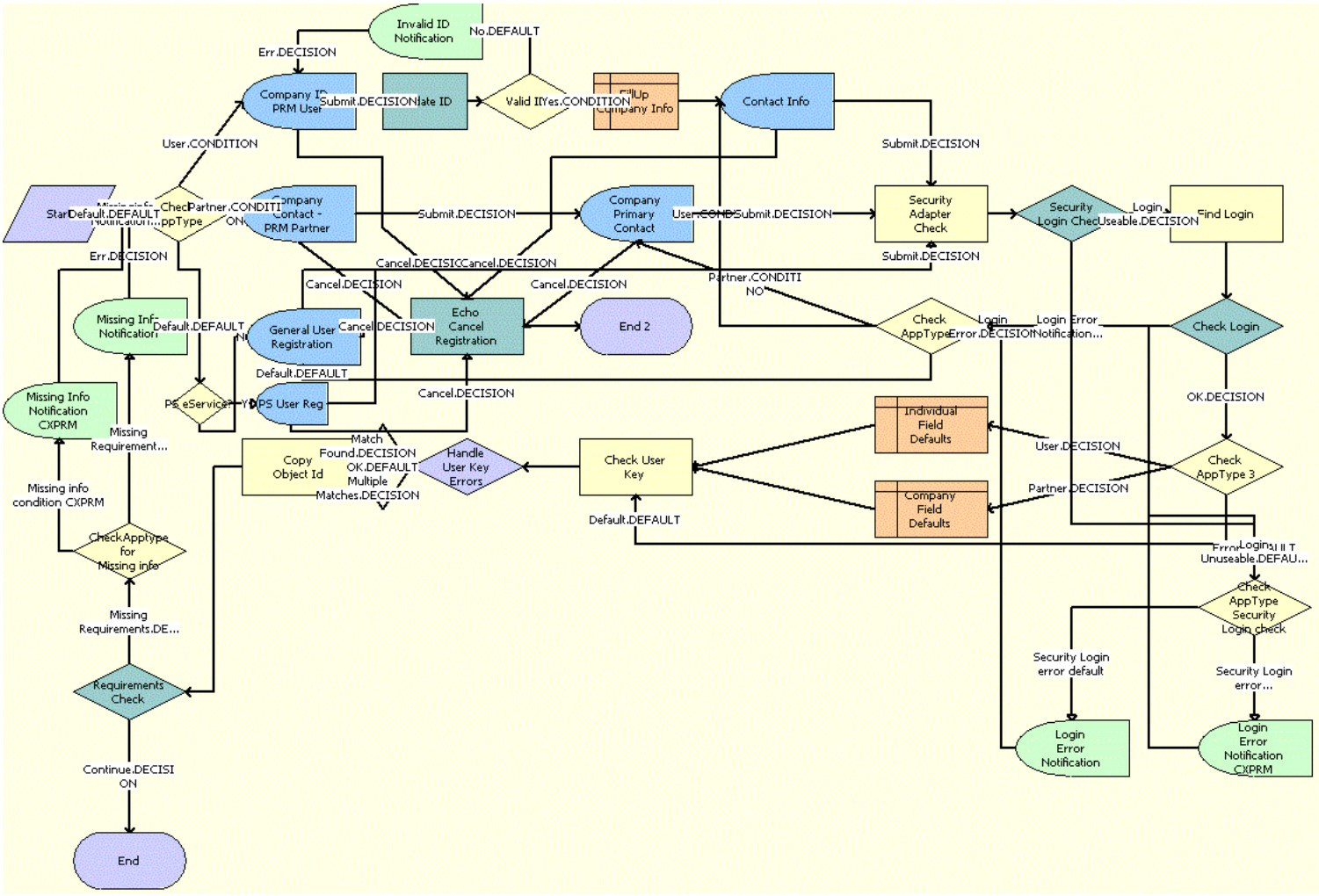
PUB Citizen User Registration Process Workflow

This workflow applies to a Siebel Public Sector Self Service Web site and is identical to the User Registration Process OUI workflow. For more information, see *User Registration Process OUI Workflow*.

User Registration SubProcess OUI Workflow

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

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



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

Workflow Description.

This workflow performs the following actions:

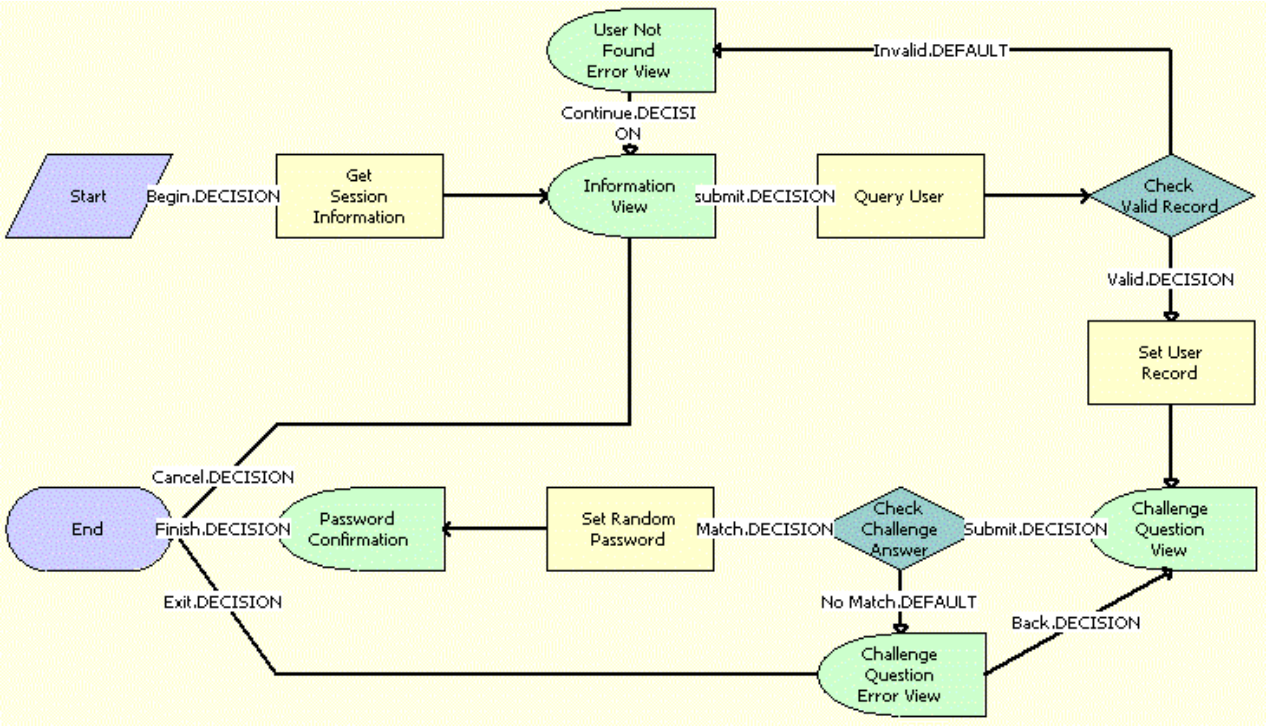
1. **Check AppType.** This step determines the type of Web site the customer uses to register.
2. **PS eService?** This step determines whether the type of Web site is the Public Sector Self Service Web site.
3. **General User Registration.** This step displays the appropriate registration form for the customer if the Web site is not the Public Sector Self Service Web site.
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. The following figure 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 Self Service Web site.



Workflow Description.

This workflow performs the following actions:

1. **Get Session Information.** This step gets information about the customer's session on the Siebel Self Service 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 Self Service 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*.

Workflows for Interview Sessions

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

- *OPA Integration Workflow*
- *OPA Integration Sub Workflow*
- *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*

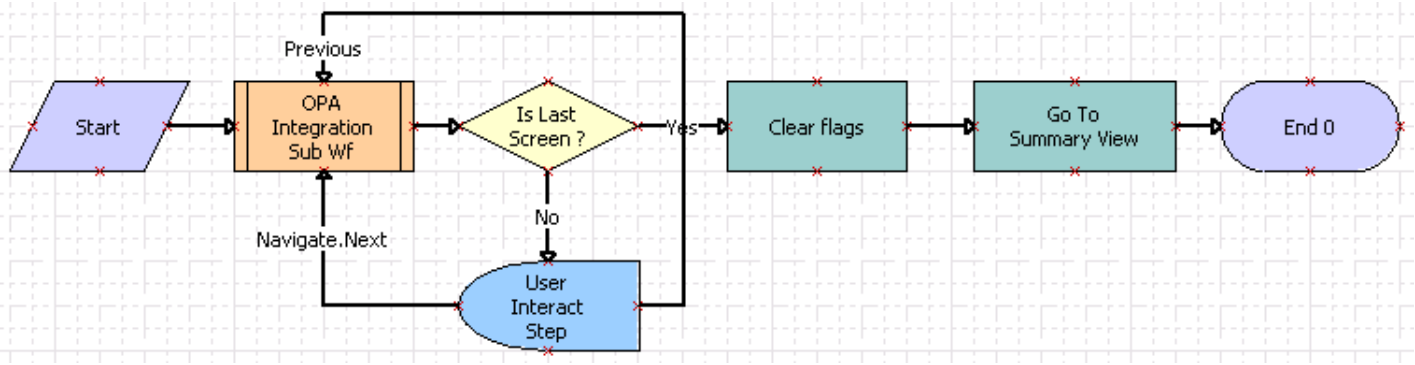
- *OPA Metadata Service - CheckAlive Workflow*

OPA Integration Workflow

This workflow manages an interview session when customers determine the benefits that apply to them. The following figure 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*.

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



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*.
2. **Is Last Screen?** This step determines whether the screen that currently appears is the last screen of the interview session.
3. **User Interact Step.** This step determines the customer action if the screen that currently appears in not the last screen of the interview session. If the customer clicks the Next or Previous button, 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* .

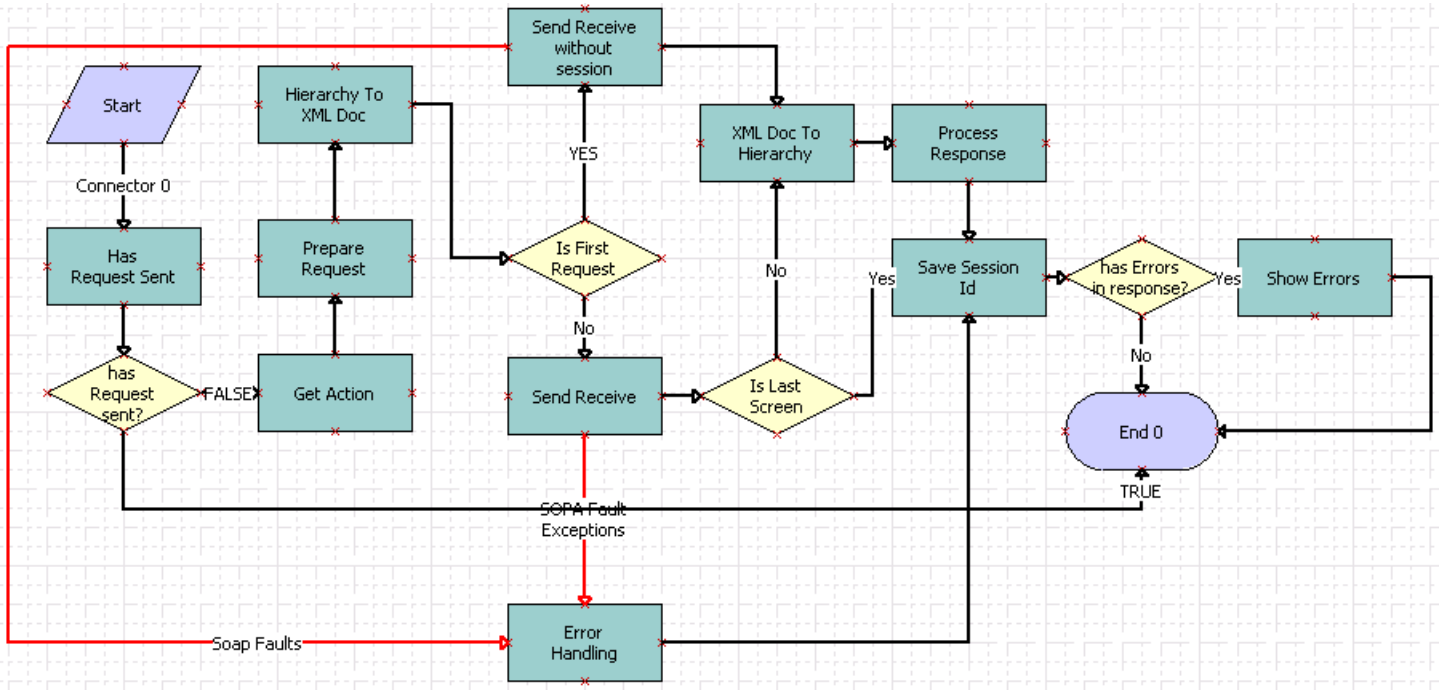
   Developers can change this view using the Summary View Name property.

OPA Integration Sub Workflow

This workflow manages the communication between an interview session for a customer and Intelligent Advisor by sending requests to Intelligent Advisor and receiving and processing responses from Intelligent Advisor. The following figure 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*.

The OPA Integration Workflow calls this workflow as a subprocess.



Workflow Description

This workflow performs the following actions:

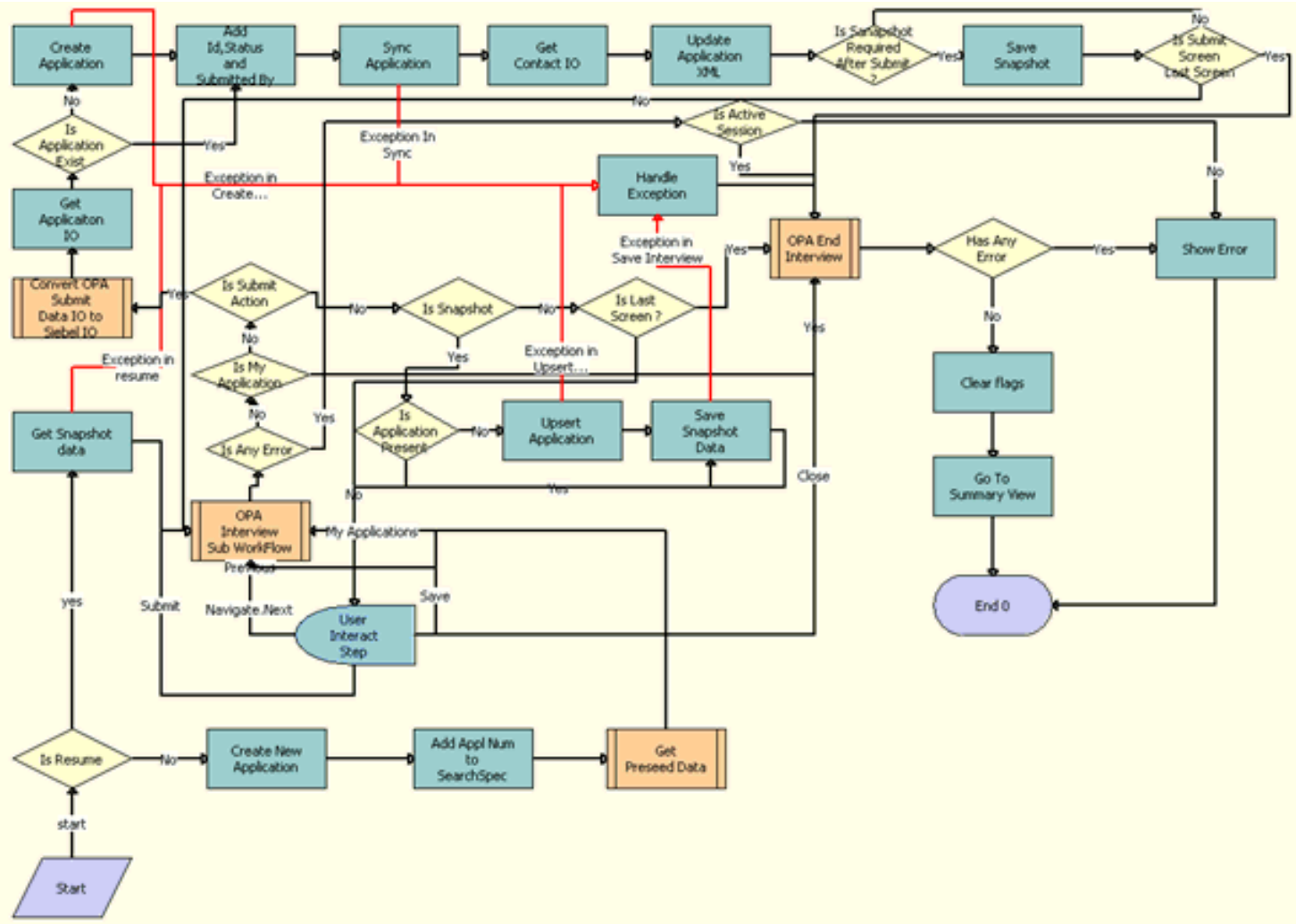
1. **Has Request Sent.** This step evaluates whether a request was sent to Intelligent Advisor with the current session ID during the current interview session. This step calls the HasRequestSent method in the OPA Interface Service business service.
2. **has Request sent?** This step determines whether a request was sent to Intelligent Advisor with the current session ID during the current interview session. The workflow terminates if the request was sent.
3. **Get Action.** This step evaluates the user action during the interview session and obtains the appropriate action type for that action. Action types include: Start Interview, Investigate, and End Interview. This step calls the Get Action method in the OPA Interface Service business service.
4. **Prepare Request.** This step uses the action and the populated user data in the interview session to prepare the request to Intelligent Advisor. 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 Intelligent Advisor if the request is the first request. This method calls the Intelligent Advisor 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 Intelligent Advisor if the request is not the first request. This method calls the Intelligent Advisor 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 Intelligent Advisor 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 CasheSessionId method in the OPA Interface Service business service.
14. **has Errors in response?** This step determines if the Intelligent Advisor response contains validation errors. The workflow terminates if the Intelligent Advisor response does not contain validations errors.
15. **Show Errors.** This step shows the error messages during the interview session if the Intelligent Advisor 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. The following figure 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 Self Service Web site.



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*.
5. **OPA Interview Sub WorkFlow.** This step calls the OPA Interview Service Sub Workflow. For more information, see *OPA Interview Service Sub Workflow*.
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

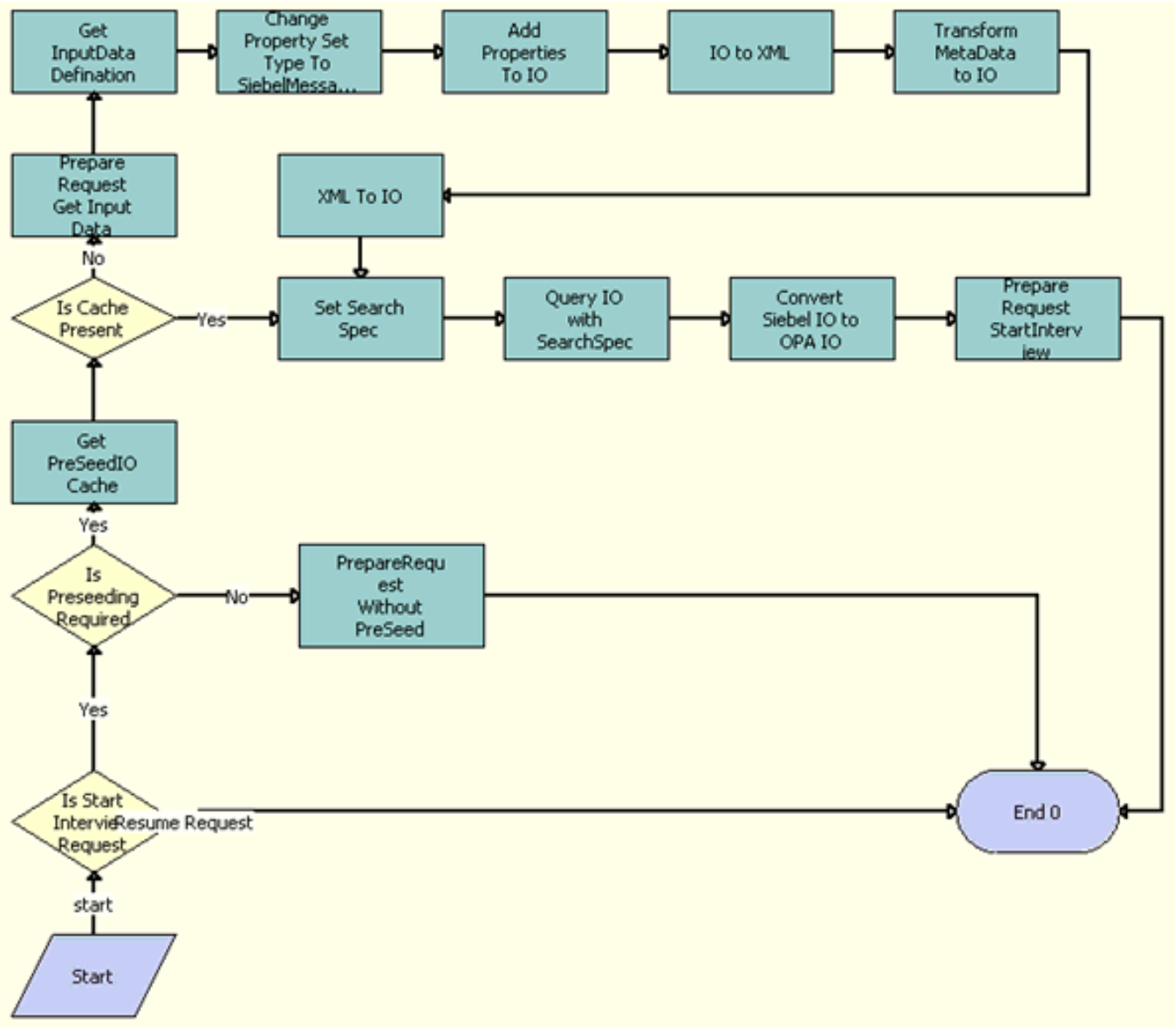
8. **Is Any Error.** This step determines whether the Intelligent Advisor response contains an error.
9. **Is Active Session.** This step determines whether an active interview session exists.
10. **Is My Application.** This step determines whether the user clicks the View Applications button in the 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 Intelligent Advisor 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*.
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 coverts 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*.
30. **Has Any Error.** This step whether the Intelligent Advisor 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 Intelligent Advisor.
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 Intelligent Advisor, converts the integration object in Intelligent Advisor 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 Intelligent Advisor format. The following figure shows this workflow.

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



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 policy model name. This method returns a value of true

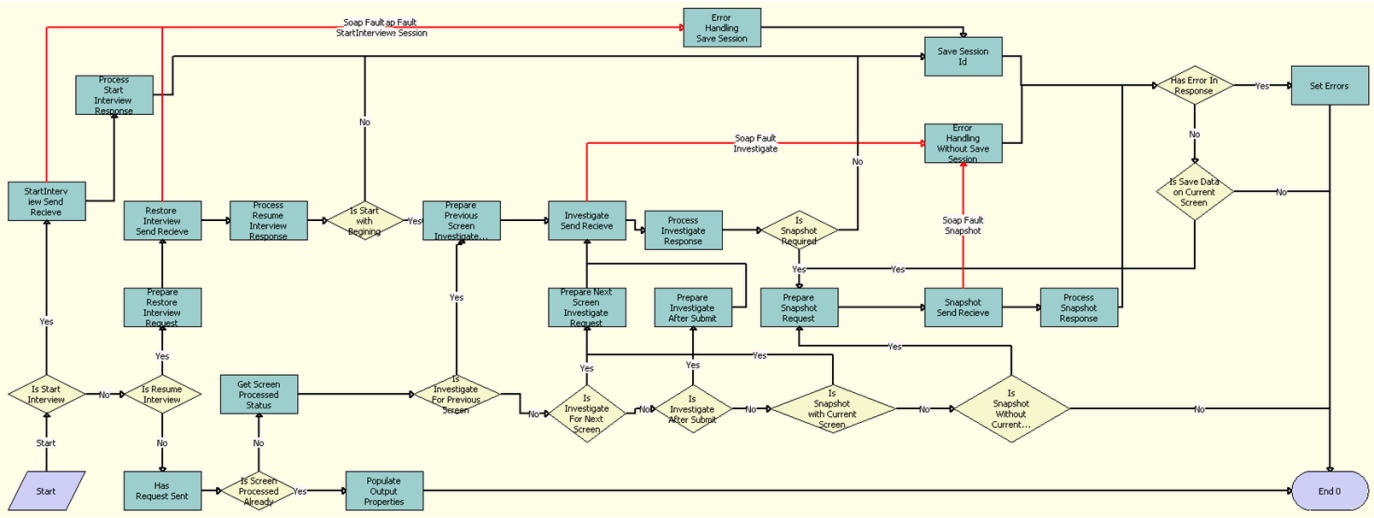
if the seed integration object is available in the cache and a value of false if the seed integration object is not available in the cache.

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 Intelligent Advisor 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 Intelligent Advisor Outbound 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 Intelligent Advisor.
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 Intelligent Advisor by sending requests to Intelligent Advisor and receiving and processing responses from Intelligent Advisor. Intelligent Advisor responses are converted to the Siebel data structure and appear in the user interface for the interview session. The following figure shows this workflow.

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



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. **StartInterview Send Receive.** This step calls the StartInterview method from the odsInterviewService12.2_SiebelOPAIntegration_type Outbound 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 Intelligent Advisor outbound proxy call. This method converts the Intelligent Advisor response into the Siebel hierarchy property set, determines if an error or warning occurs in the Intelligent Advisor 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 Intelligent Advisor 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 Intelligent Advisor is required to maintain an active interview with Intelligent Advisor, 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 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 Intelligent Advisor outbound proxy call. This

method converts the Intelligent Advisor response into the Siebel hierarchy property set, determines if an error or warning occurs in the Intelligent Advisor 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 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 Intelligent Advisor 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 Intelligent Advisor outbound proxy call. This method converts the Intelligent Advisor response into the Siebel hierarchy property set, determines if an error or warning occurs in the Intelligent Advisor 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 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 Intelligent Advisor 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.

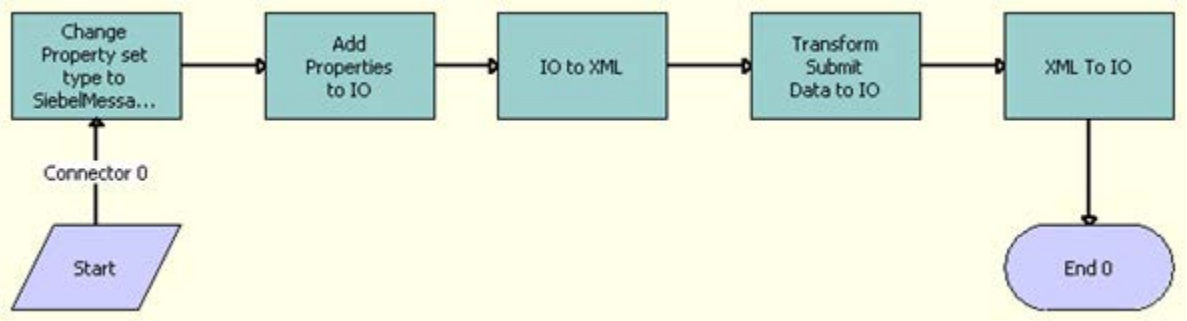
    This step is required because when a user performs a screen-level action, such as Next, Back, Close, or Save, the client framework directly calls the framework workflow, and then control goes to the OPA Interview Service Main workflow to trigger the runtime event, which holds the interview session until 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. Intelligent Advisor stores user data only when the user clicks the Save button. Intelligent Advisor 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 Intelligent Advisor format to an integration object in Siebel format. The following figure shows this workflow.

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



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Workflow Description

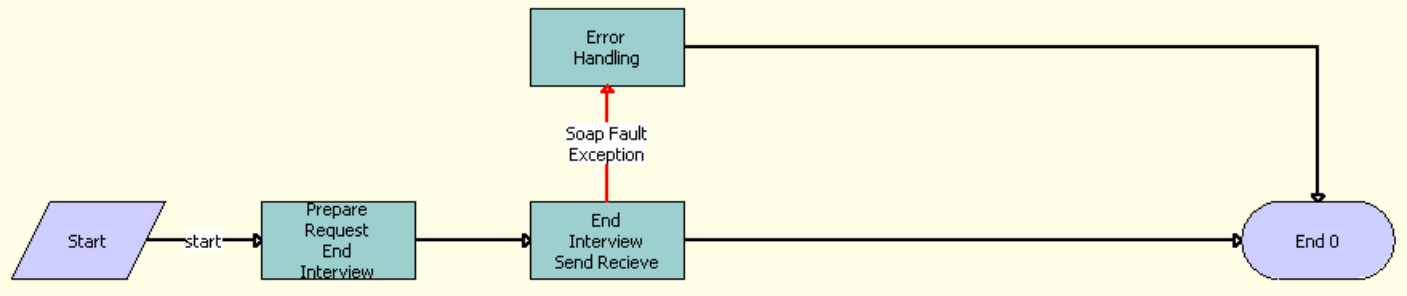
This workflow performs the following actions:

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 Intelligent Advisor 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. The following figure 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.



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Workflow Description

This workflow performs the following actions:

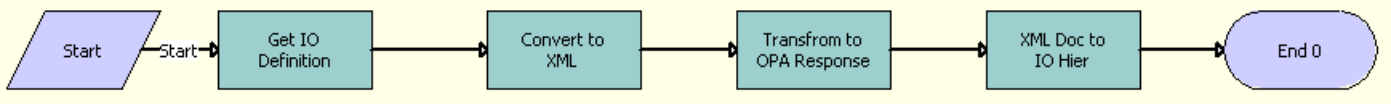
1. **Prepare Request End Interview.** This step calls the Prepare Request method from the OPA Interview Framework Service business service to prepare the End Request integration object (EndInterviewRequest:EndInterviewRequest).
2. **End Interview Send Receive.** This step calls the EndInterview method from the odsInterviewService12.2_SiebelOPAIntegration_type Outbound 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 Intelligent Advisor 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 Intelligent Advisor Hub, and sends the PUB Sample Intake Contact integration object to Intelligent Advisor. The following figure shows this workflow.

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



Workflow Description

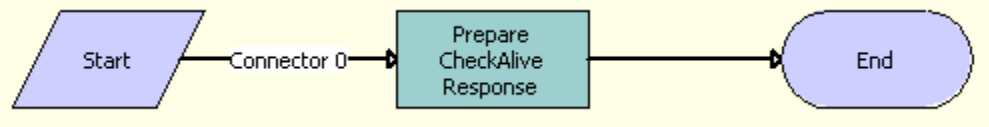
This workflow performs the following actions:

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 Intelligent Advisor 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 Intelligent Advisor.

OPA Metadata Service - CheckAlive Workflow

This workflow sends a response to a Simple Object Access Protocol (SOAP) CheckAlive request from the Intelligent Advisor Hub to Intelligent Advisor. This request checks the health of the network connections in Intelligent Advisor. This health check is called a ping. The following figure shows this workflow.

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



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 Intelligent Advisor.

Workflows for Cases

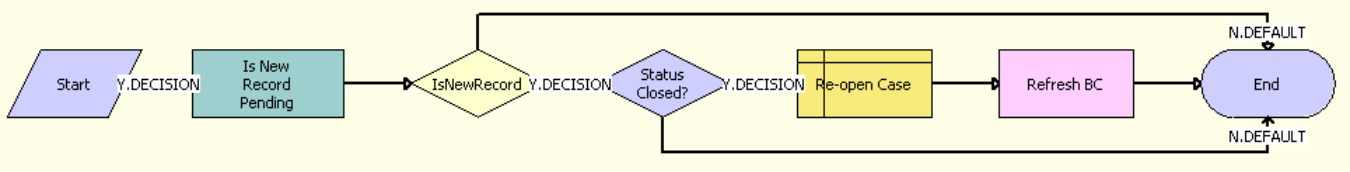
This group of workflows controls processing for cases on a Siebel Public Sector Self Service Web site. It includes the following workflows:

- *PUB Citizen Create Case Activity Workflow*
- *PUB Citizen Case Re-open Workflow*

PUB Citizen Create Case Activity Workflow

This workflow creates an activity record for a case record. The following figure 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 Self Service Web site.



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Workflow Description

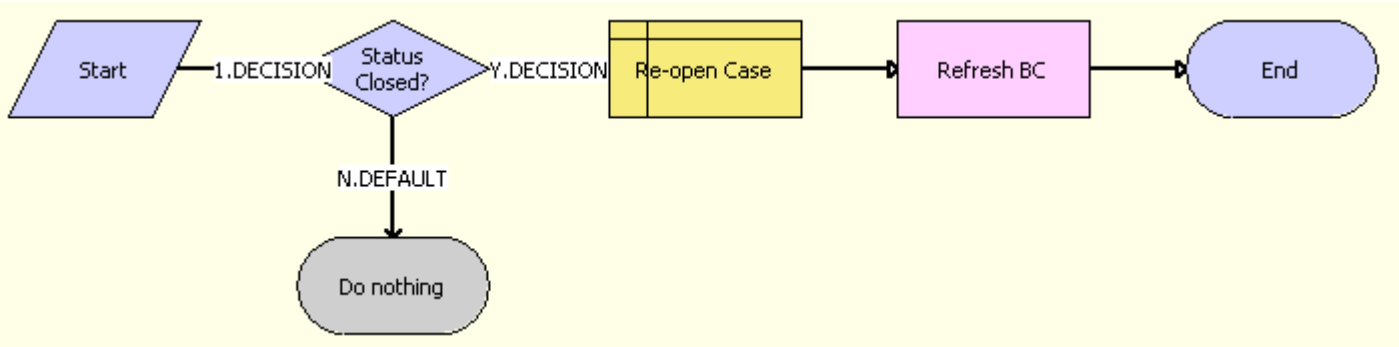
This workflow performs the following actions:

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*.
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. The following figure shows this workflow.

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



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* .

8 Siebel Self Service for Communications, Media, and Energy

Siebel Self Service for Communications, Media, and Energy

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

- *About Siebel Self Service for Communications, Media, and Energy*
- *Differences Between Siebel Self Service and Siebel Self Service for CME*

About Siebel Self Service for Communications, Media, and Energy

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

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

Differences Between Siebel Self Service and Siebel Self Service for CME

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

- *Differences in the Customer Portal for CME*
- *Differences in Personalization for CME*

Differences in the Customer Portal for CME

The customer portal for Siebel Self Service for Communications, Media, and Energy is different from the customer portal for Siebel Self Service. The most important differences are as follows:

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

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

Support for Complex Account Management

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

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

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

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

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

- **Change the current account.** Customers can select an account from drop down and select Set as Current to select the current account. Siebel Self Service displays service requests, billing information, and other information for the current account.
- **Select the primary account.** Customers can select an account from dropdown and select Set as Primary to select the primary account.
- **Add new accounts.** Customers can click the Create New Account button to create and enter information about a new account.
- **Add new addresses.** Customers can click the Add button of the Current Account Address list to add new addresses for the current account.

Support for Complex Orders Including Products and Services

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

For communications, media, and energy industries, Siebel Self Service for Siebel Industry Solutions supports these complex bundles of products and services. The Siebel Self Service application has a My Profile screen for CME which can be accessed from Side Menu. This screen has Product and Services Section. These features allow customers to view information about the products and services for the account for which they are currently logged in.

Differences in Personalization for CME

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

Any account-specific personalization rules are evaluated using the primary account of the contact. When the contact logs in, the login process loads the profile for contact's primary account into memory. When the contact selects an account, the process does not flush the profile of the primary account out of memory and load a new one. The following table outlines the profile attribute names and corresponding values changed by this process.

Attribute Name	Value
SessionAccountId	ROW_ID
SessionAccountName	NAME
CustomerAccountId	MASTER_OU_ID
DefaultPriceListId	CURR_PRI_LST_ID

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

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

- AccountId
- AccountName

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

9 Siebel Self Service for Automotive

Siebel Self Service for Automotive

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

- *About Siebel Self Service for Automotive*
- *Differences Between Siebel Self Service and Siebel Self Service for Automotive*
- *Features in User Interface for Siebel Self Service for Automotive*
- *Administering Siebel Self Service for Automotive*

About Siebel Self Service for Automotive

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

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

Differences Between Siebel Self Service and Siebel Self Service for Automotive

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

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

Features in User Interface for Siebel Self Service for Automotive

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

You can add automotive-specific views using navigation links. For more information, see *Administering Navigation Links*. The home page of Siebel Self Service for Automotive includes the following links:

- **Link to the Dealer Locator.** For more information, see *Dealer Locator*.
- **Link to My Vehicles.** For more information, see *My Vehicles View*.
- **Link to register a vehicle.** For more information, see *Vehicle Registration*.
- **Link to My Service History.** For more information, see *Service History*.
- **My Account.** Displays the My Account view. For more information, see *My Profile View*.

In addition to the configuration options available on the home page, Siebel Self Service has an additional My Profile view for the automotive industry. For more information, see *My Profile View*.

Dealer Locator

New or existing customers can use the Dealer Locator to find the dealer nearest to them so that they can purchase a vehicle or get service for a vehicle. Dealer Locator can be added to the home page by administering navigation links. For more information, see *Administering Navigation Links*.

Customers can enter the following information:

- **Location.** Customers enter either their ZIP code or their city, state and country.

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

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

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

Inventory Search for Vehicles

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

Customers enter the following information:

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

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

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

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

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

> **Note:** Inventory Search for Vehicles can be added to the home page by administering navigation links. For more information, see *Administering Navigation Links*.

My Profile View

The My Profile view is a central location with links to all the personalized information for a registered user. Registered users can display the view by clicking My Profile in the Side Menu. Customers can use the My Profile view as a dashboard to access all of their information in Siebel Self Service.

The My Profile view in Siebel Self Service for Automotive is different from the My Profile view in Siebel Self Service.

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

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

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

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

My Vehicles View

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

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

Preventive Maintenance

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

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

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

Visibility of Preventive Maintenance Actions to Customer

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

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

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

Vehicle Registration

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

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

- In My Profile for Automotive, click Vehicle Registration, and enter the vehicle registration details.

  All registered vehicles are listed in the My Vehicle view.

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

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

Service Requests

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

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

Customers can enter service requests by going to the My Profile view, clicking the My Service Requests link, and clicking the plus (+) icon in the application toolbar.

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

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

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

Service History

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

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

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

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

Administering Siebel Self Service for Automotive

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

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

- *Activating Vehicle Registration Workflows*
- *Sharing Preventive Maintenance Documents with Customers*

Activating Vehicle Registration Workflows

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

To activate vehicle registration workflows

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

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

   The Status field of the record changes to Active. After the status of every record is Active, customers can proceed with vehicle registration.
7. In Siebel Call Center, navigate to the Administration - Business Process screen, Workflow Deployment, and then the Active Processes view.
8. In the Active Workflow Processes list, query for *Interaction* workflow.
9. If the workflow is not returned, then it is not yet activated.
10. 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.
11. Stop and restart the Siebel Server.

Sharing Preventive Maintenance Documents with Customers

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

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

To share a preventive maintenance document with a customer

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

   The file is added as an attachment to the plan.

10 Using Siebel Public Sector Self Service

Using Siebel Public Sector Self Service

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

- *About Siebel Public Sector Self Service*
- *Determining Benefits Eligibility on Siebel Public Sector Self Service*
- *Roadmap for Integrating Intelligent Advisor With Siebel Public Sector Self Service*
- *Managing Applications on Siebel Public Sector Self Service*
- *Managing Cases on Siebel Public Sector Self Service*

About Siebel Public Sector Self Service

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

- 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 *Using Siebel Self Service*

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

- 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 Self Service which uses the Public Sector Self Service object manager (PSSServiceObjMgr alias) in the Siebel Public Sector component group.

About National Identification Numbers

The home page for Siebel Self Service and Siebel Public Sector Self Service 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 Self Service, 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 Self Service 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 Self Service 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 Self Service, 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 Self Service 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 Self Service

Both registered citizens who enter a user name and password to access the Siebel Public Sector Self Service 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*.

To determine benefits eligibility

1. On the home page of the Siebel Public Sector Self Service 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 followings 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 Self Service Web site appears.

Roadmap for Integrating Intelligent Advisor With Siebel Public Sector Self Service

This roadmap consists of the following processes and tasks that you must perform when integrating Intelligent Advisor with Siebel Public Sector Self Service:

- *Process of Preparing Intelligent Advisor Hub Integration*
- *Process of Integrating Intelligent Advisor in Siebel*
- *Showing the Intelligent Advisor Interview in Siebel Public Sector Self Service*
- *Custom Properties for Control Types*
- *Custom Properties for Screens*
- *Custom Properties for Entities*
- *Manifest Files for View and Applet of OPA Interview Service*
- *Managing Applications on Siebel Public Sector Self Service*

Process of Preparing Intelligent Advisor Hub Integration

This process consists of prerequisite tasks that you must perform before you can integrate Intelligent Advisor with Siebel Public Sector Self Service.

Before you integrate Intelligent Advisor with Siebel Self Service, you must complete the following tasks:

- *Activating the Appropriate Workflows*
- *Setting the Application Level User Property*
- *Configuring the Inbound Web Service for Intelligent Advisor Metadata Web Service*
- *Exposing the Siebel Metadata to Intelligent Advisor*
- *Setting Up the Intelligent Advisor Hub Connection*

Activating the Appropriate Workflows

Before you can integrate Intelligent Advisor with Siebel Public Sector Self Service, you must perform the following tasks:

- 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*.
  - OPA Integration Sub Workflow. For more information about this workflow, see *OPA Integration Sub Workflow*.
- 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*.

- OPA Interview Service Sub Workflow. For more information about this workflow, see *OPA Integration Sub Workflow*.
- OPA Get PreSeed Data Workflow. For more information about this workflow, see *OPA Get PreSeed Data Workflow*.
- OPA Process Submit Data Workflow. For more information about this workflow, see *OPA Process Submit Data Workflow*.
- OPA End Interview Workflow. For more information about this workflow, see *OPA End Interview Workflow*.
- 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*.
- OPA Metadata Service - CheckAlive Workflow. For more information about this workflow, see *OPA Metadata Service - CheckAlive Workflow*.

Setting the Application Level User Property

If you want to integrate Intelligent Advisor with Siebel Public Sector Self Service, you must first set up the application level user property for new applications. This allows the Intelligent Advisor 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 Intelligent Advisor Metadata Web Service

If you want to integrate Intelligent Advisor with Siebel Public Sector Self Service, you must first configure the inbound Web service for Intelligent Advisor 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 Intelligent Advisor 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*.

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 Intelligent Advisor

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

Note: The Contacts integration object is available as standard in Siebel Intelligent Advisor integration.

The Intelligent Advisor metadata service is implemented based on Intelligent Advisor-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 Intelligent Advisor

1. Do one of the following:
   - Modify the existing workflow *OPA Get Meta Data Service For PUB Sample Intake Contact Workflow* 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* 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 Intelligent Advisor Hub Connection

This procedure is mandatory if a metadata service is used.

To set up an Intelligent Advisor Hub Connection

1. Set up a connection to a Web service data source.
   For more information, see the Intelligent Advisor Documentation Library.
2. Update the connection details in the Intelligent Advisor 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 Intelligent Advisor Metadata Web Service*.

- **Requires WS-Security Username token in SOAP actions**. Enter your Siebel user login details.

Process of Integrating Intelligent Advisor in Siebel

To integrate the Intelligent Advisor with Siebel Public Sector Self Service, you must complete the following tasks:

- *Configuring Intelligent Advisor Interview Service URL in Siebel*
- *Creating SSO Name Using the Interview Service URL*
- *Configuring Parameters for Interview Sessions*
- *Configuring Parameters for Resuming Interviews*

Configuring Intelligent Advisor Interview Service URL in Siebel

To configure the Intelligent Advisor with Siebel Public Sector Self Service, you must configure an Intelligent Advisor Interview Service URL.

To configure an Intelligent Advisor Interview Service URL

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 Name and URL fields as follows:
      - **Name.** Symbolic URL name, for example, Intelligent Advisor Interview Service Host URL.
      - **URL.** The Intelligent Advisor Web Service URL, for example, http://<hostname>/<domain name>/determinations-server/interview/soap/12.2/

Creating SSO Name Using the Interview Service URL

To configure the Intelligent Advisor with Siebel Public Sector Self Service, you must create a SSO name using the Interview Service URL.

To create a SSO name using the Interview Service URL

1. In Siebel Public Sector, navigate to the Administration - Integration screen, then the SSO Systems Admin List view.
2. Create a new record, and complete the fields 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 in *Configuring Intelligent Advisor Interview Service URL in Siebel*.

Configuring Parameters for 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 and are described in the following table.

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 WFMyApplications	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.
DefaultVisualMode	Tile	Designates the default visual mode for the Intelligent Advisor layout.
EnableVisualMode	TRUE	Designates whether the Intelligent Advisor 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 Intelligent Advisor 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.

Parameter	Default Value	Description
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 policy model deployment name. **Note:** This parameter is mandatory.
SSO System Name	OPA Interview Service	Designates the system name associated with the symbolic URL that specifies the Intelligent Advisor Hub URL. This value must match the name value used in *Managing Applications on Siebel Public Sector Self Service*, for example Intelligent Advisor Interview Service. **Note:** This parameter is mandatory.
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, Intelligent Advisor 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 Intelligent Advisor connection is secure through an authenticated user.
Siebel Login Id	SAMPLE	Designates the Siebel login ID that is mapped to the Intelligent Advisor 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.
WorkflowName	OPA Interview Service Main Workflow	Designates the name of the workflow in the Siebel repository. **Note:** This parameter is mandatory.
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.

Parameter	Default Value	Description
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.

Configuring Parameters for Resuming Interviews

By default, if you start an interview in Siebel Public Sector, you can resume it and complete it at a later stage. However, you can modify the default configuration so that you can specify at which point of the application an interview can be resumed in Siebel Public Sector.

The OPA Interview Framework Service business includes the InvokeWorkflow method, which calls the OPA Interview Service Main workflow. This workflow enables you to resume the saved interview. For more information on the OPA Interview Framework Service business service, see *Intelligent Advisor Interview Framework Service*.

To configure parameters for resuming interviews

1. Launch Siebel Tools.
2. From the Object Explorer window, select Applet.

   The Applets window appears.
3. From the Object Explorer pane, select Applet User Prop.
4. Ensure that the following applet user property is configured:
   - **Property Name.** CanInvokeMethod: Resume
   - **Property Value.** [IsResumeAllowed]=#?TRUE#?
5. From the Object Explorer pane, select Business User Component Prop.
6. Locate and select the Named Method business component property.

   Named Method has the following setting by default:

   ```
   "Resume", "INVOKESVC", business_component_name, "OPA Interview Framework Service", "InvokeWorkflow",
   "Action", "RestoreSession", "ApplicationRowID", row_ID, "IsStartWithFirstScreenAfterResume",
   TRUE_or_FALSE_expression, "MappingName", mapping_name_provided_for_OPA Mappings_interview
   ```

   The following table describes the parameters and values you can use for the Named Method business component property.

Parameter	Value	Description
N/A	PUB Application	You must pass this business component name for CanInvokeMethod:Resume.
N/A	OPA Interview Framework Service	You must pass this business service name for CanInvokeMethod:Resume.

Parameter	Value	Description
N/A	InvokeWorkflow	You must pass this business service method name for CanInvokeMethod:Resume.
Action	RestoreSession	This parameter determines which action is performed when you click the Resume button.
ApplicationRowID	[id]	This is the row ID of the saved record and is a business component field.
IsStartWithFirstScreenAfterResume	"IIF ([Status] = LookupValue ('PUB_APP_STATUS', 'Saved'), 'FALSE', 'TRUE')"	This parameter determines whether the interview resumes from the first screen of the application or whether it resumes from the the screen on which it was saved. See Step 7
MappingName	ApplyForBenefitsMappings	The mapping name that is created for the policy model.

In this example, Pub Application is the sample business component in the default configuration, and Named Method is configured as follows:

```
"Resume", "INVOKESVC", "PUB Application", "OPA Interview Framework Service", "InvokeWorkflow", "Action",
"RestoreSession", "ApplicationRowID", "[Id]", "IsStartWithFirstScreenAfterResume", "IIF ([Status] =
LookupValue ('PUB_APP_STATUS', 'Saved'), 'FALSE', 'TRUE')", "MappingName", "ApplyForBenefitsMappings"
```

7. To configure the IsStartWithFirstScreenAfterResume parameter so that the interview resumes from the first application screen, update the parameter value to the following:

```
"IIF ([Status] = LookupValue ('PUB_APP_STATUS', 'FirstScreen'), 'FALSE', 'TRUE')"
```

Authenticating Web Service Communications with Intelligent Advisor

In the preconfigured Siebel Public Sector Self Service application, Web service communications with Intelligent Advisor 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 authenticate Web service communications with Intelligent Advisor

1. In Siebel Public Sector, navigate to the Administration - Integration screen, then, SSO Systems Admin List View.
2. Locate the System Name described in the following.
3. In the SSO System Users list, create a new record, and complete the fields 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 Intelligent Advisor.
Password	Type the password for Intelligent Advisor.

4. Change the following:
    - **Secure Connection.** Change to YES or TRUE.
    - **SSO System Name.** Change to the system name that you designate in Step 1 (for example, Intelligent Advisor Interview Service).
    - **Siebel Login Id.** Change to the login name that you designate in Step 1 (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.

Note: The Secure Connection field is valid only if Intelligent Advisor Hub where a policy model is deployed is secured with settings "Allow access to users only with the Web Service API role" enabled under "Change Web Service API Access Control" for Users in Intelligent Advisor Hub. If the value in the Secure Connection field is False, then the security settings for anonymous access, that is the Allow Anonymous Access field, must be set to true in the Intelligent Advisor Hub. For more information about Hub security settings, see the topic on Intelligent Advisor Permissions, in the *Project Administration Guide* in Intelligent Advisor Documentation library.

- The Invoke WorkFlow method is used to invoke the application-specific driver workflow, for example, the OPA Interview Service Main Workflow. This method uses all the mapping parameters configured for the OPA Interview Service Main Workflow as described in *Process of Integrating Intelligent Advisor in Siebel*.
    - 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* and *OPA Integration Sub Workflow*.
    - 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 *Business Services for Intelligent Advisor*.

Showing the Intelligent Advisor Interview in Siebel Public Sector Self Service

To show the Intelligent Advisor in Siebel Public Sector Self Service, you create a runtime event.

To show details of Intelligent Advisor Interview in Siebel Public Sector Self Service

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 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 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 Intelligent Advisor 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 Intelligent Advisor

The following table compares the control types in Oracle Policy Modeling (OPM), in Siebel Public Sector Self Service, and in HTML files for Web pages in Siebel Public Sector Self Service.

Attribute Type in Oracle Policy Modeling	Control Type in Oracle Policy Modeling	Control Type in Siebel Public Sector Self Service	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 policy model 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 policy model in Oracle Policy Modeling, see *Oracle Policy Modeling User Guide*.

You use the values for keys when you configure the HTML files for Web pages. Sample HTML files are available for the Siebel Application Interface in the following directory: `applicationcontainer_external/siebelwebroot/htmltemplates/samples/ps`.

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="Label1" style="display: none;"></label>
```

where:

`Label1` is the value for this key.

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

```
<label id="Label1" tabindex = "0" style="display: none;"></label>
```

where:

`Label1` 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 Intelligent Advisor. An example follows:

```
<img src="images/sample.png" alt="sample image"></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 Self Service, 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 Self Service) 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 Self Service). 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 Self Service), use `<input type="check">` 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 Self Service), use `<select>` code.

- For a control type of multiline text box in OPM (or the control type of text area in Siebel Public Sector Self Service), 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 policy model 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 policy model in Oracle Policy Modeling, see Oracle Policy Modeling User's Guide.

You use the values for keys when you configure the HTML files for Web pages. Sample HTML files are available for the Siebel Application Interface in the following directory: `applicationcontainer_external/siebelwebroot/htmltemplates/samples/ps`.

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 Oracle Policy Modeling, 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*.

  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>
```

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 Intelligent Advisor, 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.

Create and Deploy the Sample Policy Models in Intelligent Advisor

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

```
Tools_install_location\REPPATCH\SampleScreening.zip

Tools_install_location\REPPATCH\ApplyForBenefits.zip
```

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

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 *Managing Applications on Siebel Public Sector Self Service*.

Managing Applications on Siebel Public Sector Self Service

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

- *Applying for Benefits*
- *Resuming a Saved Interview*
- *Resuming the Submission of Applications*
- *Viewing the Status of Submitted Applications*
- *Revising Rejected Applications*
- *Adding Attachments to Applications*
- *Cancelling Applications*
- *Deleting Applications*
- *Viewing Cases*
- *Updating Cases*
- *Requesting Appointments for Cases*
- *Viewing the Status of Appointment Requests*
- *Requesting Appeals for Cases*
- *Viewing the Status of Appeal Requests*

Applying for Benefits

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

To apply for benefits, citizens can enter information in an Intelligent Advisor interview session that they access in the Siebel Public Sector Self Service 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). You can start an interview and resume it at a later time, for more information, see *Control Types for Integrating Intelligent Advisor*.

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 Self Service Web site.

> **Note:** The described behavior of the Intelligent Advisor interview session in this topic applies to the preconfigured, sample policy model for Intelligent Advisor. If customers use a different policy model, then this behavior does not apply. For more information about the sample policy model, see *Siebel Public Sector Guide* .

The sample Intelligent Advisor policy model that is shipped with the product is meant to only illustrate the capabilities of the integration between Intelligent Advisor and a self-service Web site for Siebel Public Sector Self Service.

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 numbered progress bar at the start of the screen depicts your progress in completing the application. Each step of the progress bar with a number and a description represents a screen of the interview session. The steps that are inconsistent with the information that you provide, and that you cannot access, are unavailable to you. For example, if you indicate that you have no income, then you cannot access the step to provide details about your income.

  The numbers each side of the progress bar show the number of steps that do not appear in the progress bar for the current screen of the interview session. You can click these 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 Self Service Web site, click the APPLY FOR BENEFITS link.

   The first screen of the Intelligent Advisor 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 *Custom Properties for Images*.
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*.
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 Self Service Web site appears.

Resuming a Saved Interview

When conducting an interview in the Apply For Benefits screen, you can save and resume the interview at a later stage.

To resume a saved interview

1. In Siebel Public Sector Self Service, click My Applications.
2. Select the interview you want to resume, then click Resume.

> **Note:** You can configure interviews to resume on the screen on which they are saved, or from the first application screen. For more information, see *Configuring Parameters for Resuming Interviews*.

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 Self Service 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 Self Service 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*.

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 Self Service Web site. For more information, see *Viewing Cases*.

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 Self Service 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 Self Service 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*.

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 Self Service 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*.

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 Self Service 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 Self Service 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.

Cancelling Applications

Citizens might decide to not apply for benefits after starting an application, or they might want to discard an existing application, and create a new application. 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 Self Service 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 Self Service 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 Self Service 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 Self Service 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 Self Service

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

- *Viewing Cases*
- *Updating Cases*
- *Requesting Appointments for Cases*

- *Viewing the Status of Appointment Requests*
- *Requesting Appeals for Cases*
- *Viewing the Status of Appeal Requests*

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 Self Service 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 Self Service 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 Self Service 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 Self Service 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 Self Service 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 Self Service 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*.
   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 Self Service 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 Self Service 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 the topic *Updating Cases*.

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 Self Service 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 Self Service 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 Self Service 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 Self Service 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 Self Service 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 in Step 4 in *Updating Cases*.

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 Self Service 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 Self Service 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 Self Service Web site, then complete the following steps:

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

11 Business Services for Intelligent Advisor

Business Services for Intelligent Advisor

This chapter includes information about the business services for Intelligent Advisor. It includes the following topics:

- *Intelligent Advisor Interview Framework Service*
- *PUB OPA Utilities Service*
- *Metadata Filter Service*

Intelligent Advisor Interview Framework Service

This business service includes methods that accomplish the following actions:

- Make outbound Web service calls to interact with Intelligent Advisor.
- Maintain the ID of an interview session.
- Handle the Intelligent Advisor response.
- Prepare a flat control property set that the dynamic frame class needs.
- Prepare responses to Intelligent Advisor 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 Intelligent Advisor Interview Framework Service business service.

This business service includes the following methods:

- *AddPropertiesToPropertySet Method*
- *AddSoapHdrFilter Method*
- *CacheSessionId Method*
- *ChangePropertysetType Method*
- *Clearflags Method*
- *ConvertSiebelIntObjToStartInterviewReqIntObj Method*
- *ErrorHandling Method*
- *Get Action Method*
- *GetAdminMappingInfo Method*
- *GetAdminMappingInfoAndCache Method*
- *GetCachedIO Method*
- *GetPropertySet Method*
- *HasRequestSent Method*

- *InvokeWorkflow Method*
- *PopulateOutPutProperties Method*
- *Prepare Request Method*
- *PrepareRequestAfterSubmit Method*
- *PrepareRequestGetInputData Method*
- *PrepareRequestGetSeedData Method*
- *PrepareRequestInvestigateWithPrevScreen Method*
- *PrepareRequestStartInterview Method*
- *ProcessResponse Method*
- *SetErrors Method*
- *SetSearchSpecToSiebelMsg Method*
- *ShowErrors Method*

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 Intelligent Advisor 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 Intelligent Advisor.The OPA Get Preseed Data workflow calls this method.

ErrorHandling Method

This method handles Simple Object Access Protocol (SOAP) fault exceptions during Intelligent Advisor 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 Intelligent Advisor 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 OPA 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 Intelligent Advisor 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 Intelligent Advisor 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 Intelligent Advisor. 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 Intelligent Advisor response, and updates the Has Errors In Response and the ErrorDetails output parameters. If the Intelligent Advisor 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 CSSPUBOPAUtilService 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 Oracle Policy Modeling. 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*
- *Response Filter Method*

Request Filter Method

When Intelligent Advisor 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 Intelligent Advisor request, it adds the CheckAlive_Output element or the GetMetaData_Output element in the Simple Object Access Protocol (SOAP) body. Because Intelligent Advisor 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.