

FileNET

CRM Integration Suite

Operations Manual

Version 3.0

FileNET Corporation

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About this Manual

As the businesses grow, there is substantial increase in the documents being generated. Managing these enterprise documents manually can be a tedious process. For the ease of Siebel CRM application users, FileNET brings the benefits of enterprise document management to Siebel eBusiness applications through a set of modules, known as FileNET's **CRM Integration Suite (CIS)**. The suite provides enterprise document management functionality to any Siebel implementation allowing quick and easy capture, access, management, and integration of information with Siebel and other business applications.

This manual describes CRM Integration Suite 3.0 (CIS) and provides the details of the functionalities and features offered by CIS.

Overview

This manual is designed to assist the Siebel users in storing and accessing documents and linking them to Siebel records through the Siebel Client Interface. The first chapter introduces CIS, and the subsequent chapters contain task-oriented activities that enable the users to access the documents. Following is an overview of the information that the manual contains:

Chapter 1 – Introduction to CIS - introduces to the CRM Integration Suite.

Chapter 2 – User Operations - explains how to access the documents using Siebel Client Interface.

Target Audience

This manual has been designed for Siebel Enterprise Application users. This manual is limited to describing the CIS functionality and does not focus on describing any Siebel specific functionality or module.

Conventions and Notations Used in this Manual

To locate and interpret information easily, the manual uses consistent visual cues, and standard text formats.

This table below shows the visual cues used in the manual

<u>Convention</u>	<u>Description</u>
Bold type	Indicates menu names, menu items, file names, directory names, notes, tips, and warnings.
<i>Italic type</i>	Indicates referenced document titles.
Blue text	Indicates a link to another topic, a link to another section in the

same topic, or a link to an external topic.

..\

Indicates a directory structure that remains fixed relative to a dynamic location.

Note

Includes information that one might find useful or would want to know about in the given context.

Table 1: Visual Cues

Acronyms and Abbreviations used in this Manual

The table below lists the acronyms and abbreviations used in this manual.

Acronyms and Abbreviations	Explanation / Expansion
CIS	CRM Integration Suite
CRM	Customer Relationship Management
CS	Content Service
IDM	Integrated Document Management
IS	Image Service
SSO	Single Sign On

Table 2: Acronyms and Abbreviations

1. Introduction

CRM Integration Suite (CIS), Version 3.0

CRM application users have an increasing need to store and access structured and unstructured information. Siebel eBusiness Application is an example of a CRM application. Letters, faxes, emails, spreadsheets, images, engineering diagrams, and multimedia objects are a few examples of unstructured information.

FileNET, an industry leader in Content Management and Workflow Systems, brings the benefits of Enterprise Document Management to Siebel eBusiness Application users through a set of modules. This set of integration modules is known as CRM Integration Suite (CIS). CIS enables Siebel users to seamlessly store and access documents stored in the FileNET Panagon™ IDM repositories.

CIS3.0 enables Siebel web client user to perform following operations:

- ❑ Add the document to FileNET library and link it to active Siebel row
- ❑ View the documents linked to active Siebel row
- ❑ Search the documents by specifying Search criteria. Link / Unlink searched document with the active Siebel row
- ❑ View/Update the properties of the document
- ❑ View/Update security of the document
- ❑ View a document using IDM Viewer / Java Viewer / Native Viewer.
- ❑ Check-in/Check-out documents residing in CS libraries

Note: Active Siebel Row refers to current Siebel row selected by the user.

Components of CIS

CIS application consists of an embedded **FileNET Attachments** view within Siebel web client. This view consists of following sub-views:

- ❑ **Add document:** Using this View, user can Add a document to the FileNET library and link it to active Siebel row
- ❑ **View linked documents:** Using this View, user can view the documents linked to active Siebel row

- ❑ **Query and link documents:** Using this View, user can search documents stored in FileNET repositories by specifying search criteria to link and unlink a document with active Siebel row.

CIS configurable parameters

This section describes the various configurable options in CIS. These options can be set by the CIS administrator and are described in detail in the CIS Installation and configuration guide.

Session Time Out is the time period for which if a user is idle, CIS session will time out and unsaved changes will be lost.

Display document properties option is required to display configured FileNET indices.

Enable View Menu Option is required to provide **View** Button on CIS web pages.

Open Single Linked Document facilitates user to automatically open a single linked document for a document class

Default Viewing Action is the default action for viewing documents when clicked on hyper linked Document Id. There are two options to choose from

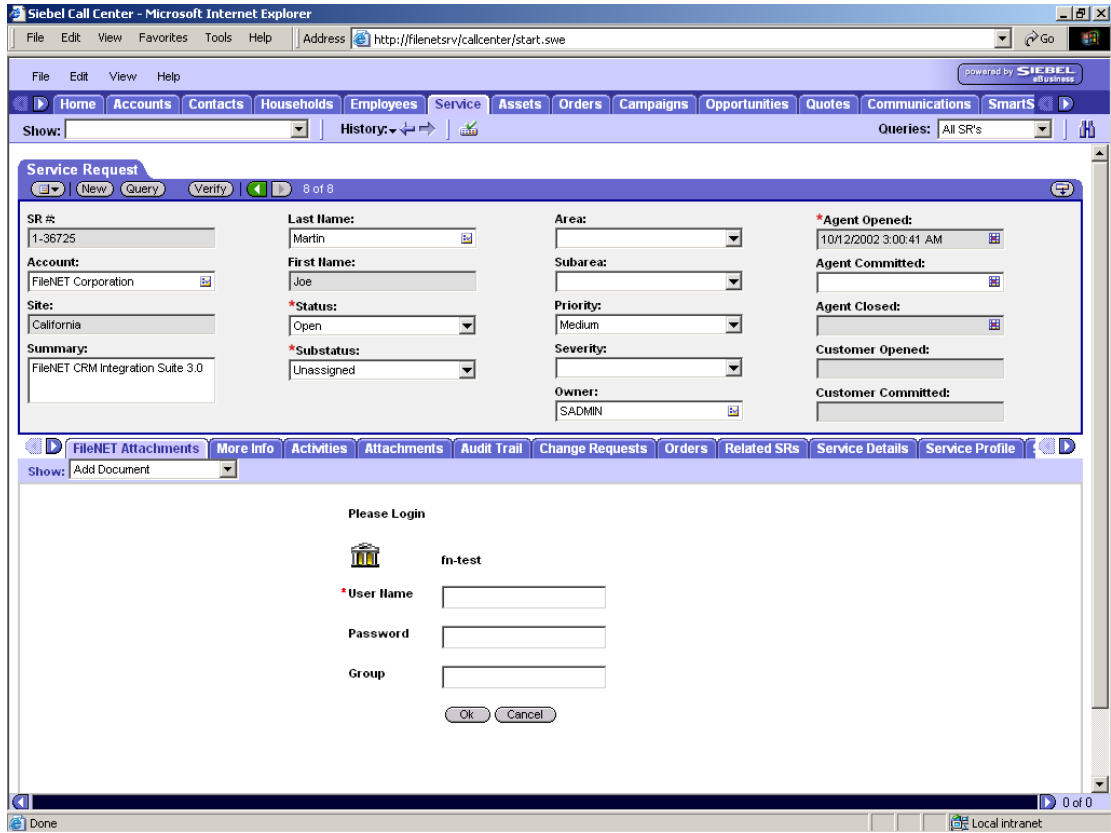
- **View** Facilitates opening the selected document in IDM viewer
- **Open** Facilitates opening of selected document in **Java viewer** provided selected document MIME type is supported by **Java viewer** otherwise document will be opened in **Native application**.

Interactive Mode specifies the interactivity mode for CIS 3.0 application.

- **High Interactivity mode** supports an implicit save whereby navigating off a record causes the changes to be saved.
- **Standard Interactivity mode** supports an explicit save operation for each record to commit the changes.

Logon to CIS application & FileNET Panagon™ IDM repositories. There is no explicit logon required for logging into CIS application. User can access CIS application once logged into Siebel 7.0.4 Client Application. However, logon is required for logging into FileNET IDM repositories from CIS application. Logon to FileNET can be performed in any of the following ways

- **SSO:** Single Sign On facilitates user to silently logon into FileNET libraries, without prompting user for FileNET credentials.
- **Cookies:** Logon is performed using FileNET user credentials stored in the cookies. User supplied credentials are stored in the cookies after an explicit logon.
- **Explicit Logon:** System prompts to enter valid FileNET logon credential and user-supplied credential are used for logging into FileNET libraries. A Login screen, as shown below, will appear for user-supplied credentials.



Note: CIS does not prompt for credential while logging into preferred FileNET libraries instead uses the credentials provided by administrator while configuring CIS application.

2. User Operations

This chapter explains the following user operation in CIS 3.0:

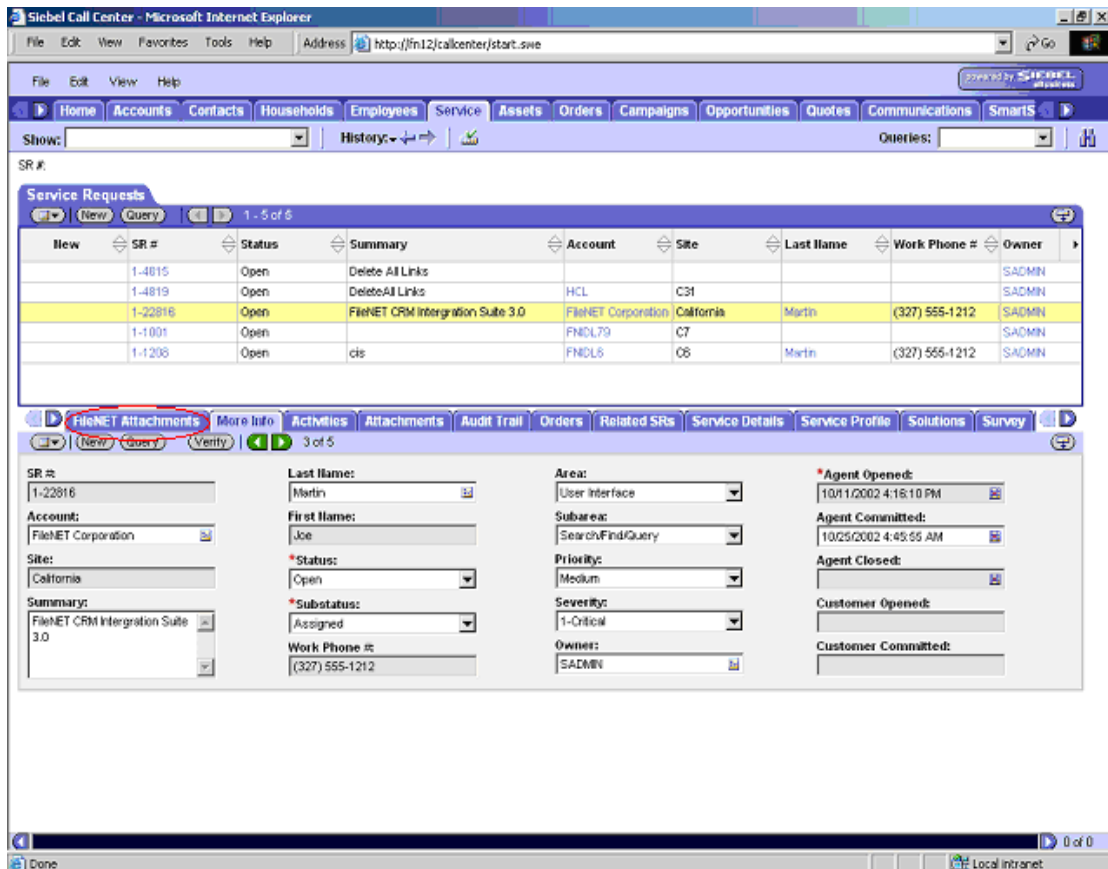
- View Linked Documents
- Add Document
- Query and Link Documents

Note: This manual explains the CIS functionality by describing it on **Service Request** business component of **Siebel Call Center Application**. CIS functionality can be accessed in a similar manner from the other configured business components

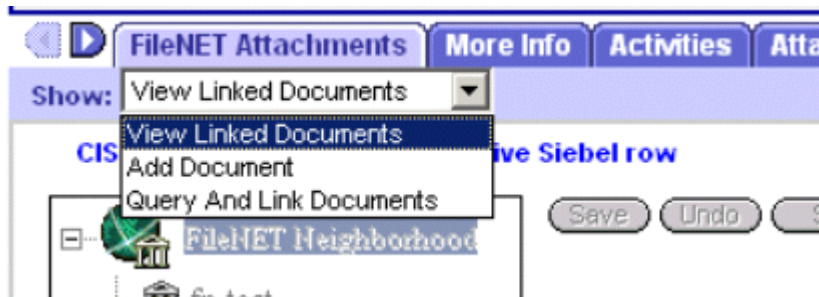
Accessing CIS Operations

To access CIS functionality perform the following steps:

- Log on to the Siebel application
- Click on Service screen tab. All views under Service screen tab are displayed.
- Select a Siebel row for which you want to carry out CIS operations.
- Click on FileNET Attachments view, to access CIS operations



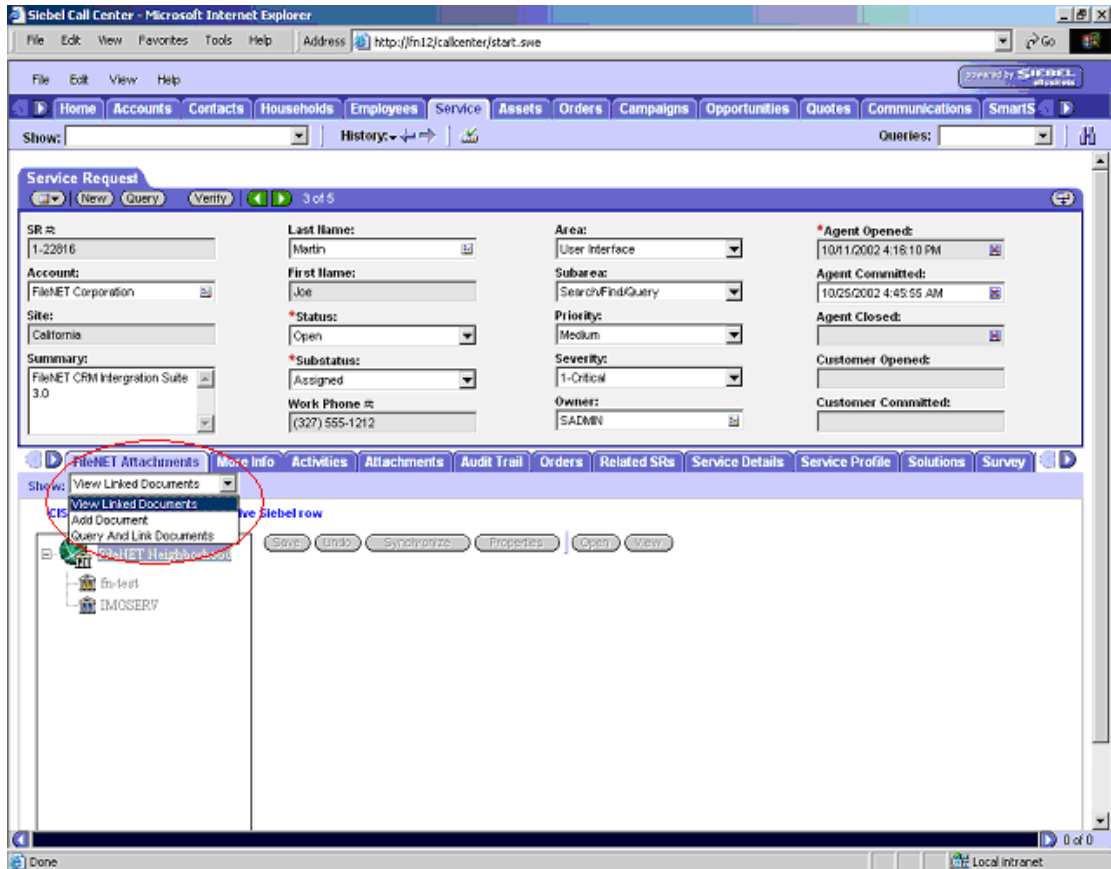
Following screen shows the operations available in the FileNET attachment view



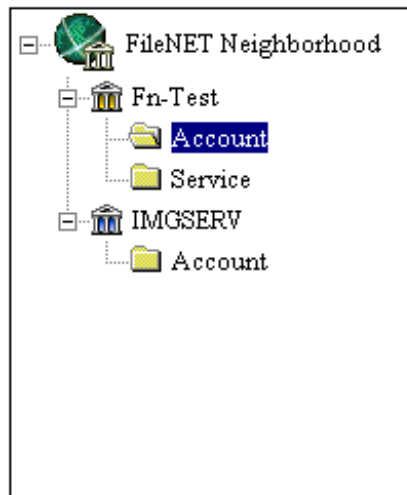
View Linked Documents

View linked documents lists previously linked documents with the active Siebel row and allows the linked documents to be viewed, and unlink from active Siebel row. It also allows updating document properties, security settings, and creation of annotations on a selected document.













When clicked on FileNET Attachments View tab, View Linked Documents is invoked automatically. This operation can also be invoked by selecting **View Linked Documents** from FileNET attachments drop-down list



The FileNET Neighborhood tree view displays libraries and document classes, to which the linked documents belong.



The first document class of preferred FileNET library is automatically selected and details of documents of this document class are displayed in **List View** next to the **Tree View**.

Unlink	Document ID	*SP#number	Account	*ClosedDate	*idmDocCustom13	Severity	En
	 003679999	1-22816	FileNET Corporation	10/12/2002 00:00:00 AM	None		10/12/02
	 003680000	1-22816	FileNET Corporation	12/10/2002 00:00:00 AM	none		10/12/02
	 003680001	1-22816	FileNET Corporation	1/1/2002 00:00:00 AM	desert view		10/12/02
	 003680002	1-22816	FileNET Corporation	2/2/2002 00:00:00 AM	text file		10/12/02
	 003680003	1-22816	FileNET Corporation	3/3/2002 00:00:00 AM	Cost.txt		10/12/02
	 003680004	1-22816	FileNET Corporation	5/5/2002 00:00:00 AM	Expenses.xls		10/12/02

The **List View** shows the following default documents properties:

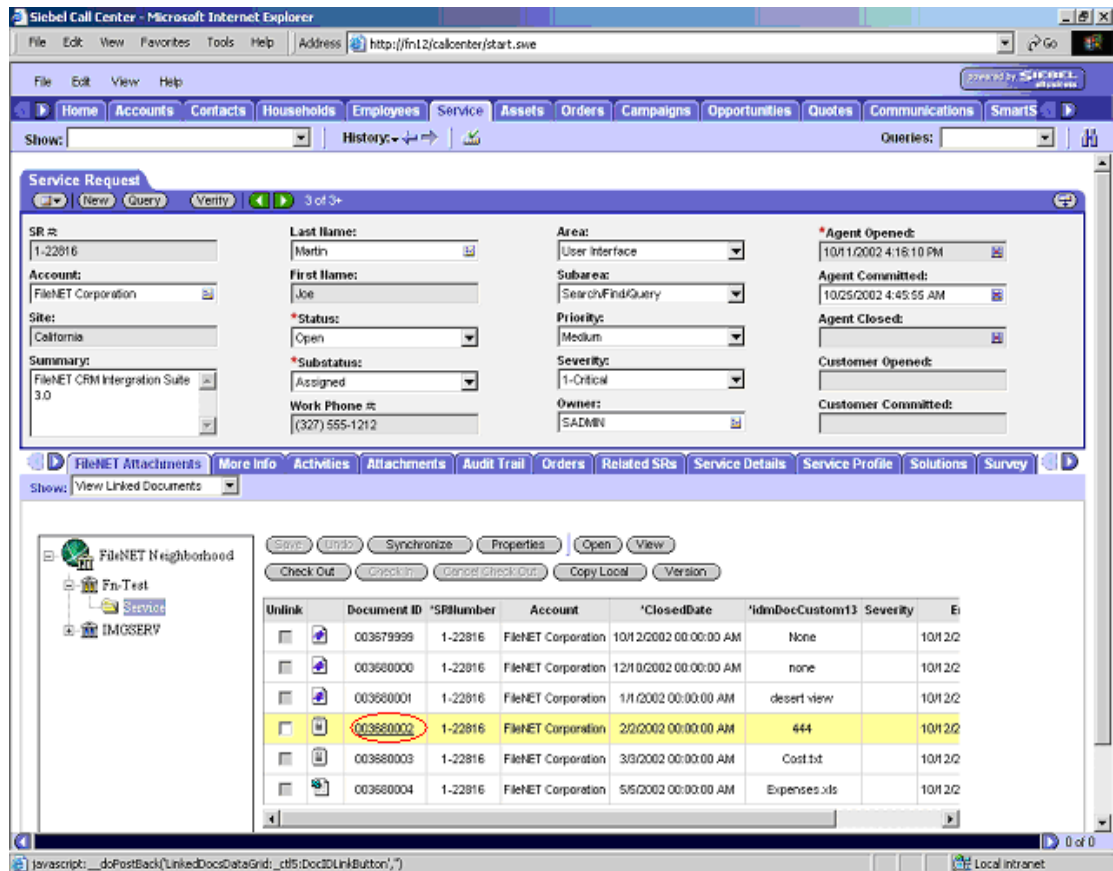
- Document ID
- Document Type Icon
- Entry Date
- Pages

The **List View** also shows the other configured document properties (indices) configured for this document class.

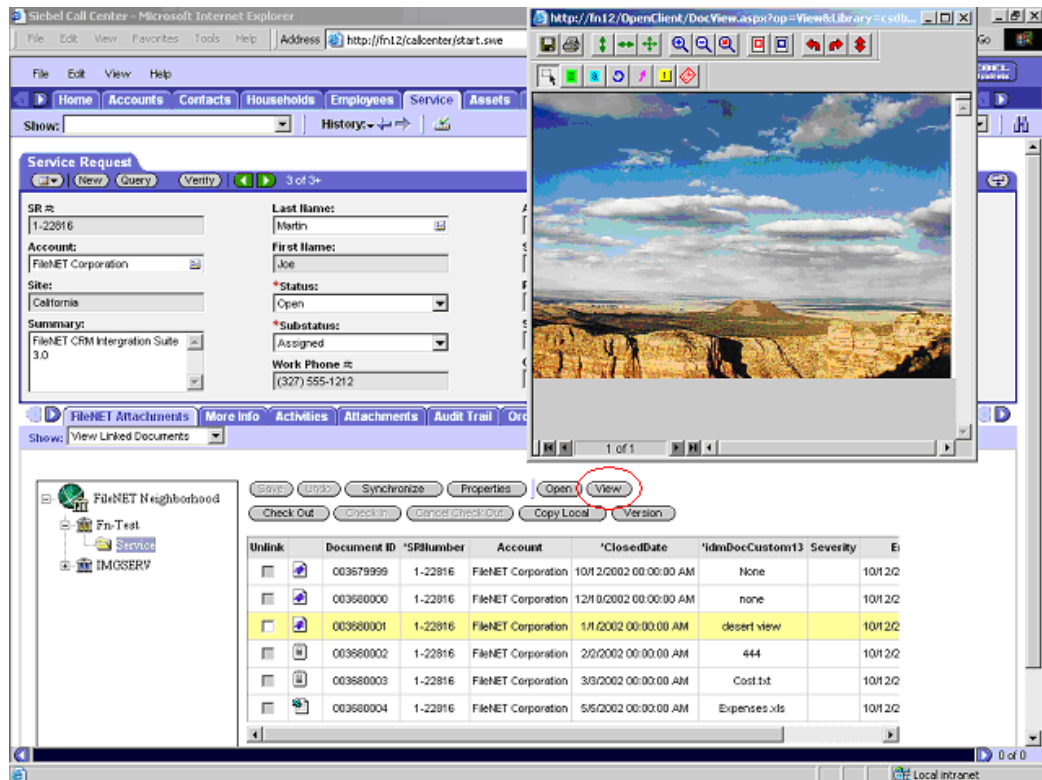
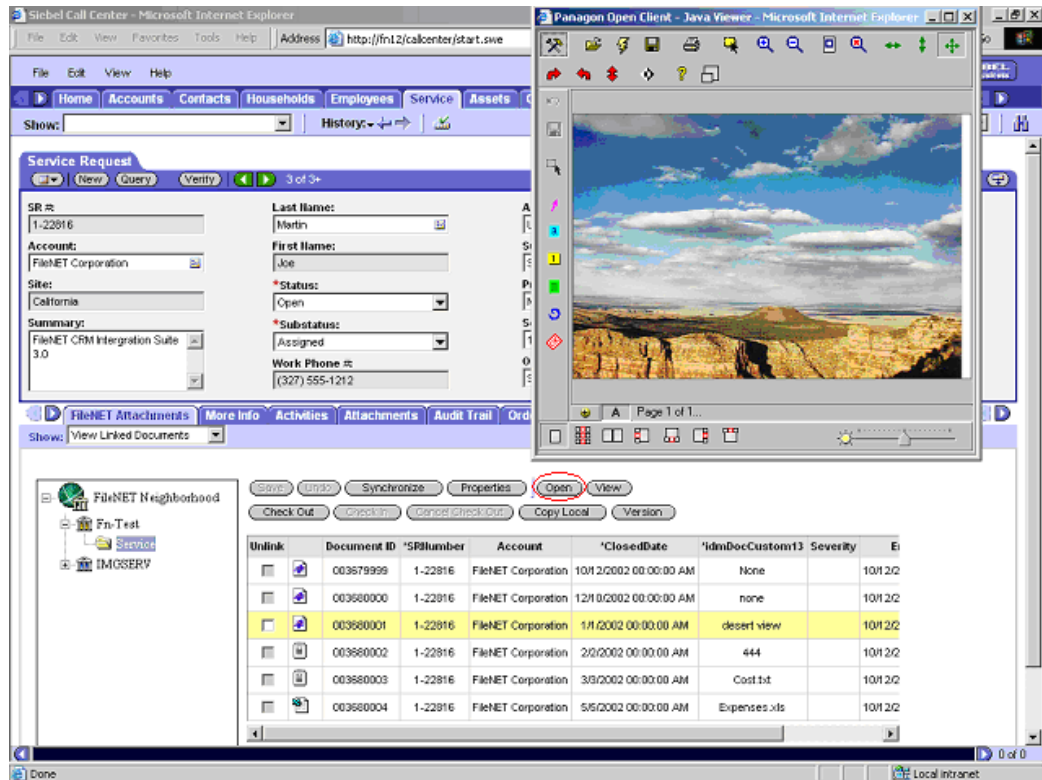
Viewing Documents

Document Id: Click on document ID hyper link in any row to view the document.

Note: The document contents are displayed using configured default viewing action.



Menu buttons: Click on any row of **List View** to select the document to be viewed. Click on **Open** or **View** option from CIS menu to view document.

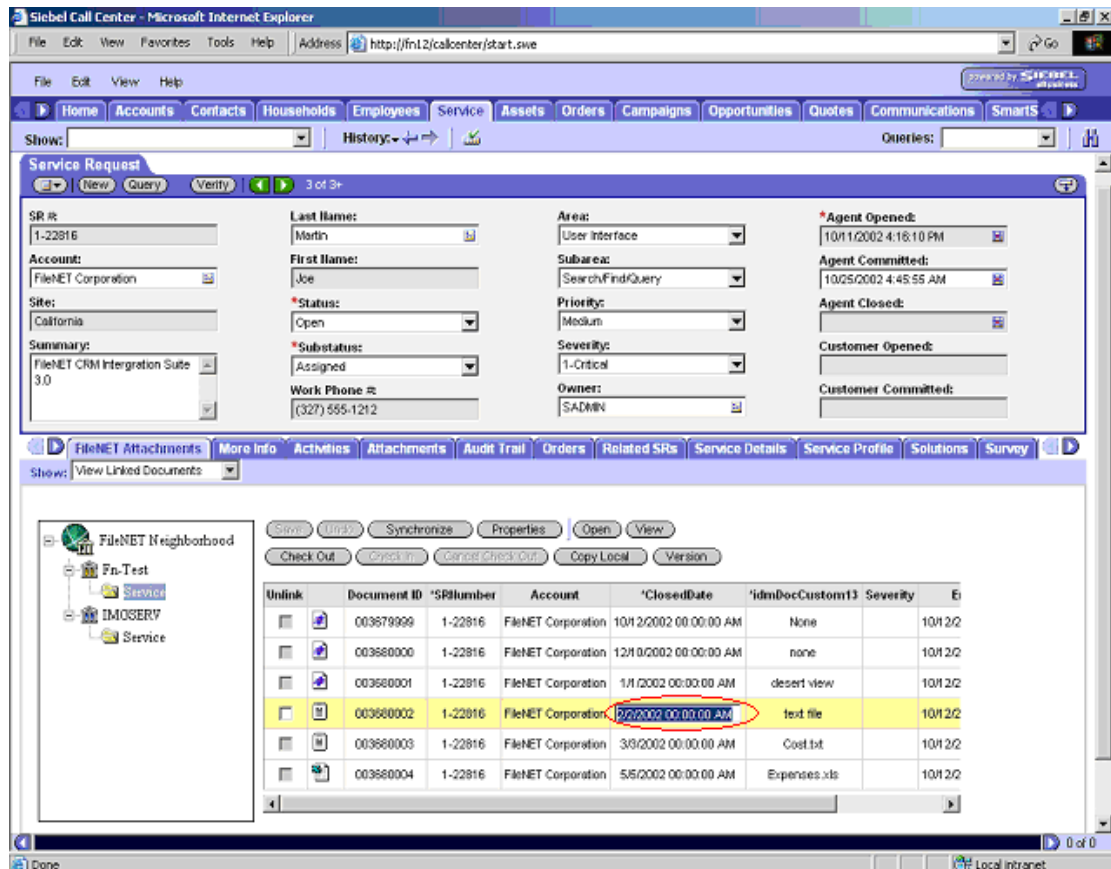


Single Linked Document: If CIS application is configured to open **Single Linked Document** automatically, CIS invokes default viewer to display contents of the document when the selected **Document class** has only one document listed in **List View**.

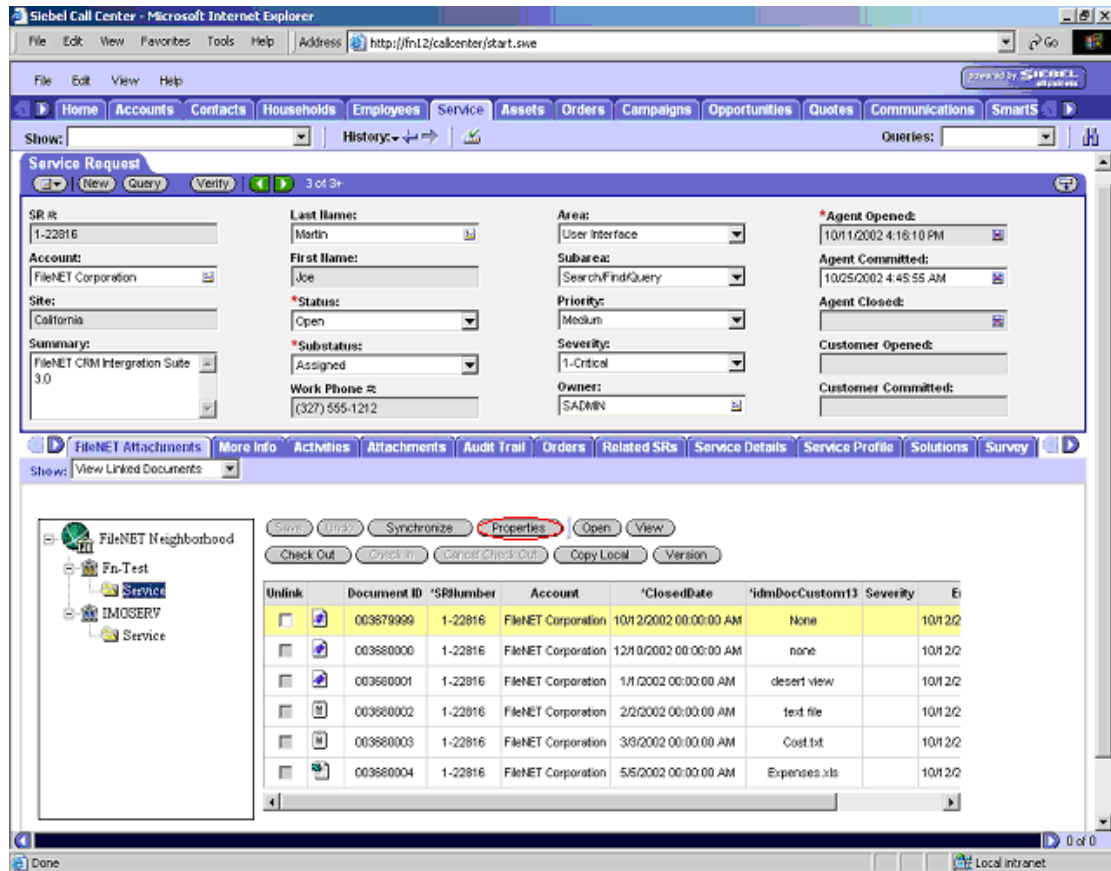
Updating document & properties

Custom Properties: CIS allows updating custom properties within **List View**. Properties can also be updated by clicking **Properties** and **Synchronization** buttons. To update properties it is required to have adequate security access for the document. Select the document for which properties needs to be modified and use any of the following option:

List View: Click on any custom properties column, the column becomes editable. Change the column contents and save the changes.



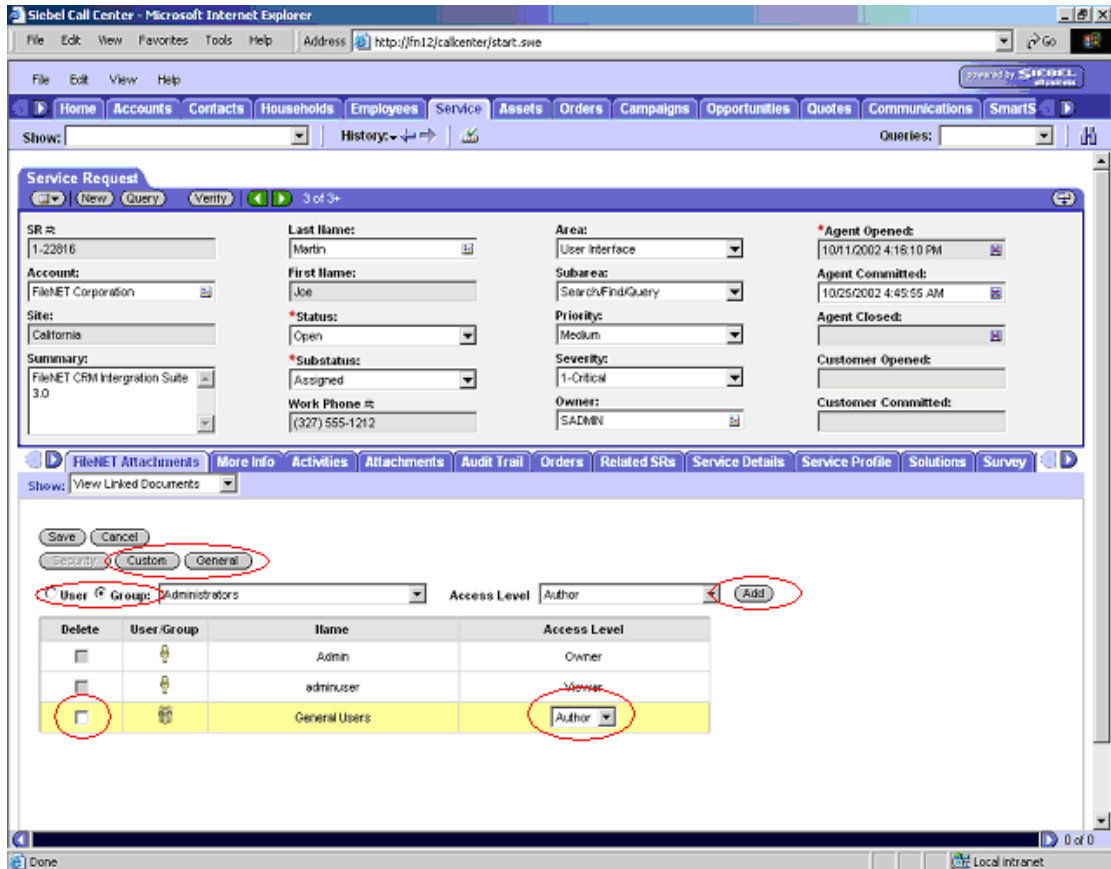
Properties button: Click the properties button to update the security, Custom and General attributes of the document.



Security: To change security settings for the selected document by adding or deleting user / group information along with modify the access level for existing user / group.

Updating security for CS document

Following screen shows the document security attributes for a document archived in a CS library.



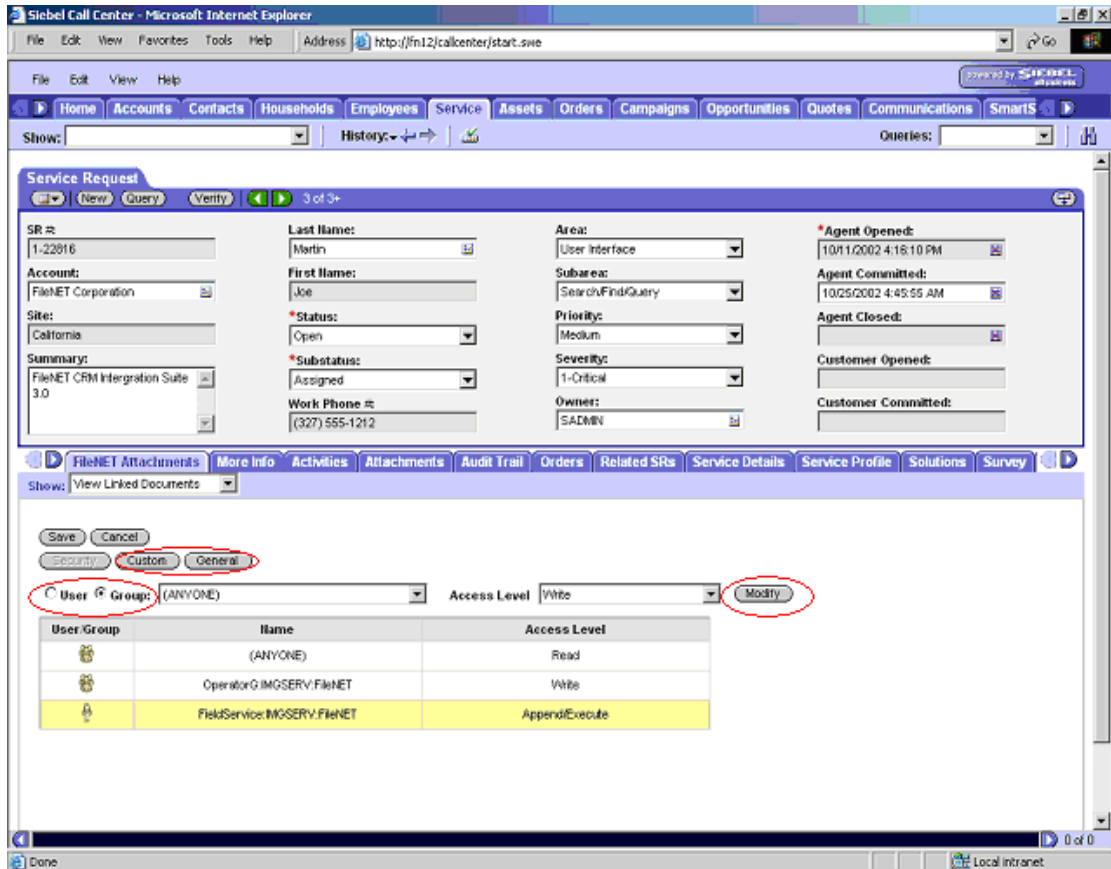
To defining security for CS document, click the **User** or **Group** radio button to select a user or group. Select the user or group name from the dropdown list. From **Access Level** dropdown list, choose the level of security for this user or group. Click on **Add** button.

To modify the access level for any user, click on the access level column in the List view to be modified. Select access level to assign to the user / group and **Save**.

To delete an existing security select the **Delete** check box. Click on **Save** button to save document properties (including security settings) and to cancel property changes click on **Cancel** button. Clicking **Save** and **Cancel** button will display View Document Screen.

Defining security for IS document

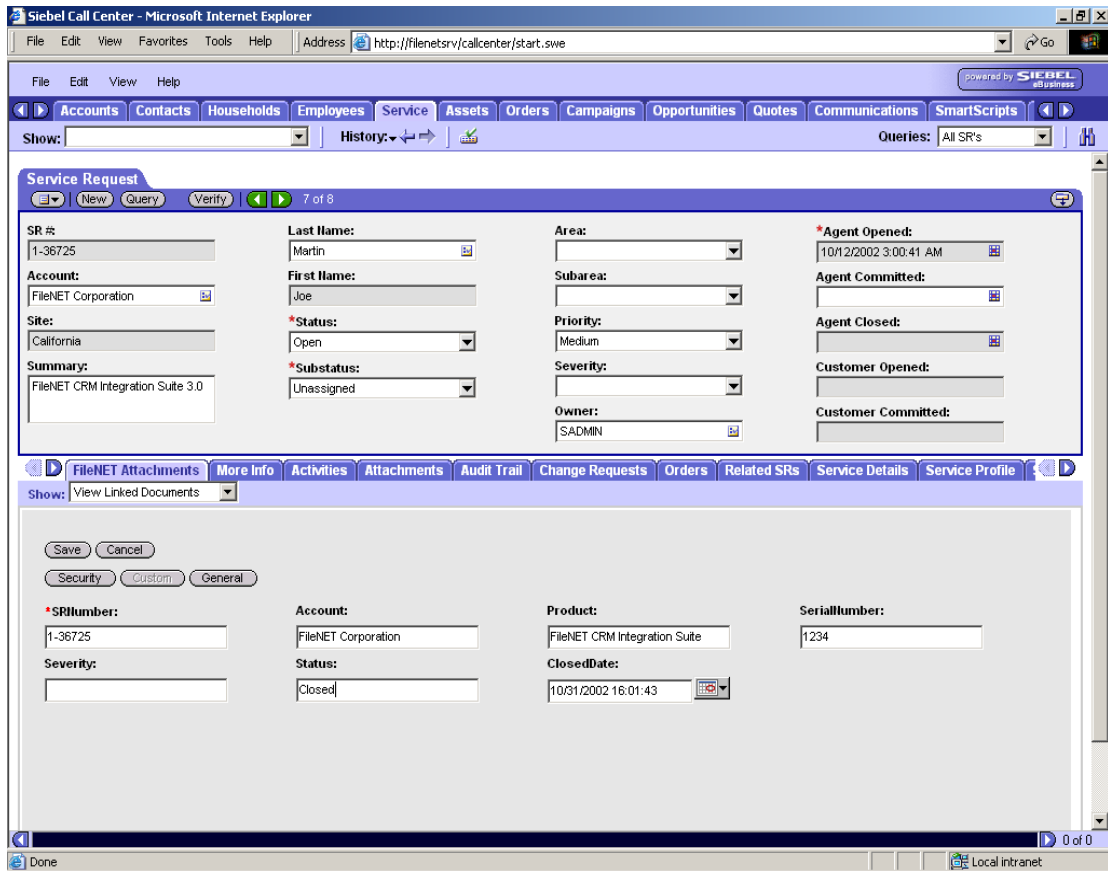
Following screen shows the document security attributes for a document archived in an IS library



Select either the **User** or **Group** radio button. From the dropdown list, select the user/group that should have the associated access. Select security access level from **Access Level** drop down and click on **Modify** button, selected user/group will get the access assigned.

Click on **Save** button to save all document properties i.e. **General**, **Custom** and **Security** properties and click on **Cancel** button to cancel the changes. Click on **Save** and **Cancel** button will take user to View Document Screen.

Custom: This screen displays and allows update of all custom properties, as defined in the document class, in which the document is archived. The indices may or may not be configured in the CIS application.

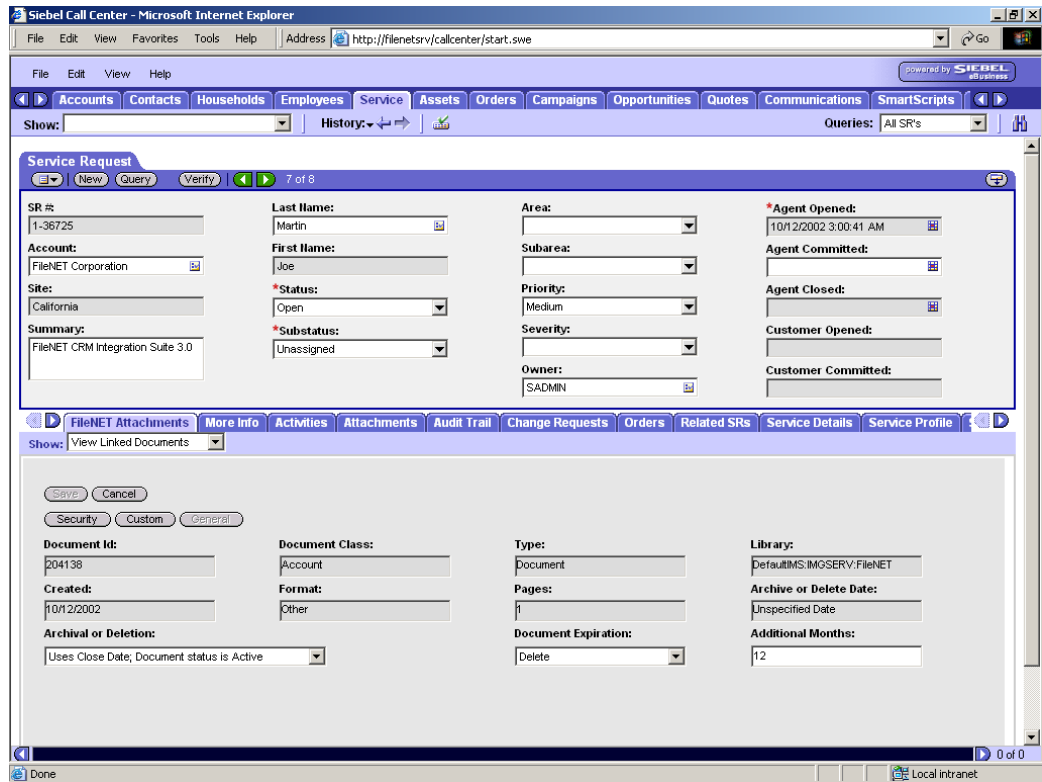


Note: Custom Properties prefixed with asterisk (*) are mandatory and value must be provided for these fields.

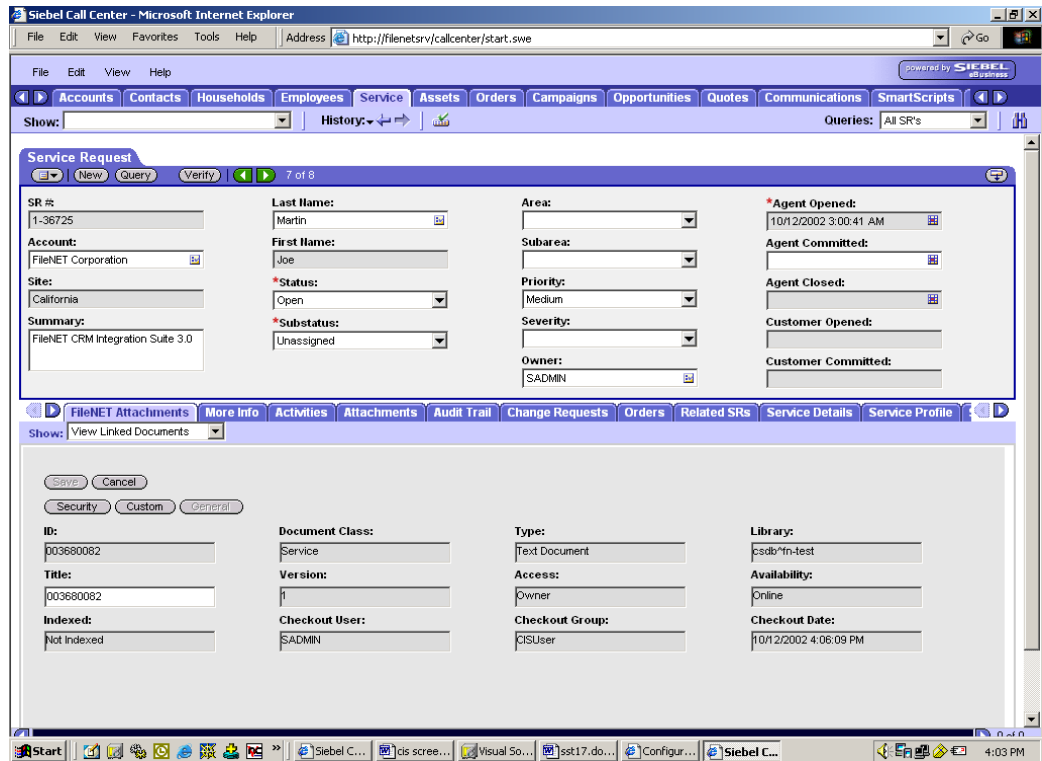
To save document properties changes click on **Save** button. Alternatively click on **Cancel** button to cancel the changes.

General: This screen displays and allows update of general properties as applicable to libraries used for archiving document. Properties like the Archival, Deletion, Additional Months, and Document Expiration are editable for IS documents. Whereas for CS documents, only **Title** property is editable. Other properties are non-editable.

Following screen shows the general property screen for a CS document

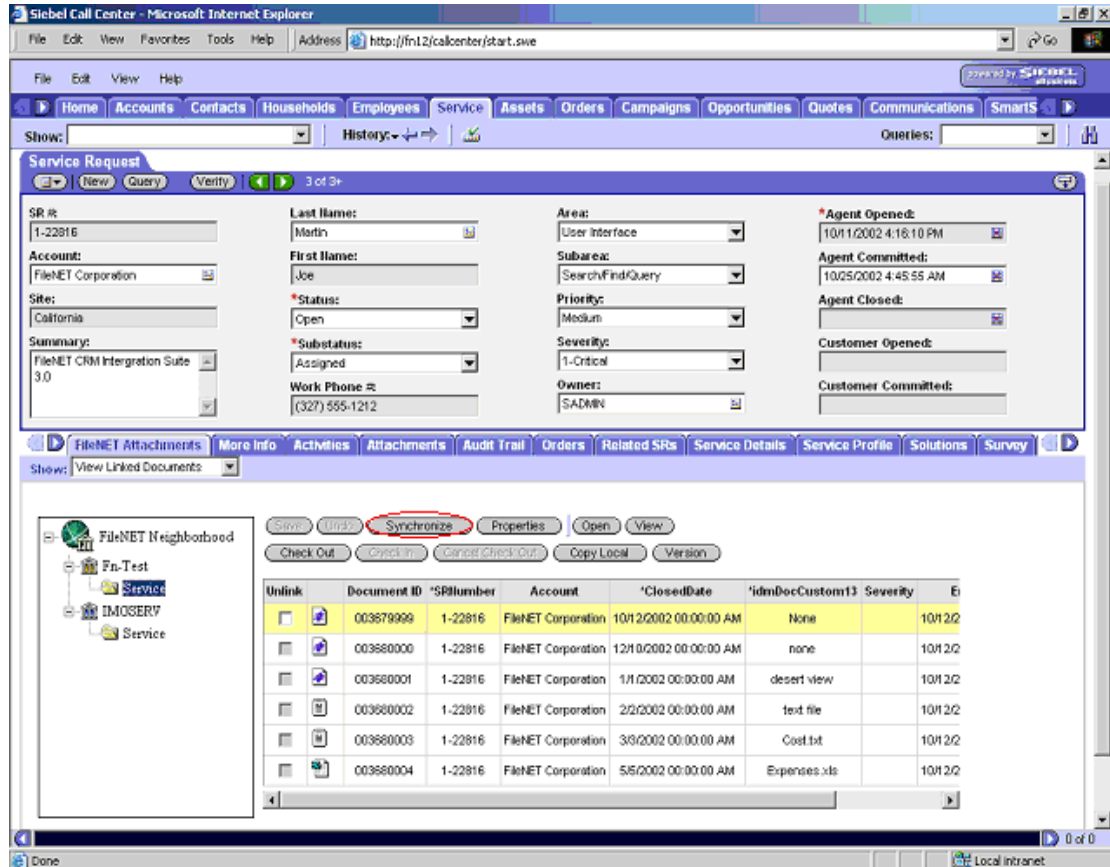


Following screen shows the general property screen for an IS document



To save document properties click on **Save** button. Alternatively click on **Cancel** button to cancel the changes.



Synchronize menu option: Selected document properties will be updated with the mapped Siebel field values of the active Siebel row on click of Synchronize menu option.







Annotations

View Menu Option: IDM Viewer supports annotations for the FileNET formats (FileNET image formats, TIFF and multi-page TIFF documents, .BMP files, .JPEG files, FileNET forms, and COLD documents). While displaying such a document in IDM view, choose an annotation and apply it to the displayed page.

Create an annotation as follows:







- Select **highlight** annotation  from the annotation tool bar, click and drag across the area to be highlighted
- Select **text note**  annotation from the annotation tool bar, click at the point from where the text should be started. Then write the text in the text tab in the dialog box

- Select **hand-drawn line**  annotation from the annotation tool bar, select the pen tool and then drag the pointer in a desired shape
- Select **arrow**  annotation from the annotation tool bar, click and drag from the end of line to the point of the arrow
- Select **sticky note**  annotation from the annotation tool bar, click on the page where note should appear and write note in the note tab of the dialog box
- Select **stamp**  annotation from the annotation tool bar, click on the image where stamp should appear. Select an existing stamp or create a new stamp and write stamp text in stamp tab of the dialog box

Annotations can be saved by clicking on **save** button or by closing the IDM viewer and clicking **Yes** in the confirmation dialog box.

Open Menu Option: Allows to create / update annotations for the displayed document using Java Viewer (if mime type is supported by Java Viewer), which has the feature to create annotation and save for future viewing.

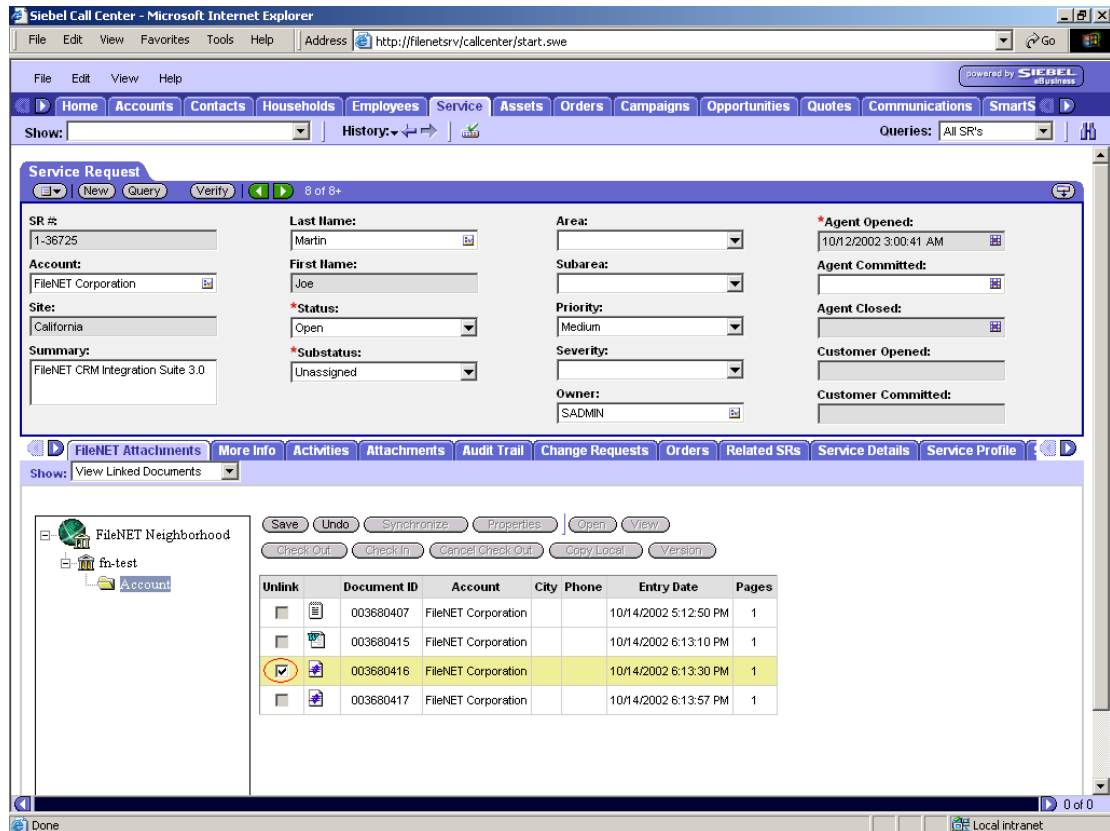
Create an annotation as per the instructions follows

- Select **arrow**  annotation from the annotation tool bar, click and drag from the end of line to the point of the arrow
- Select **transparent text**  from the annotation tool bar, click on the image on which text is to be written and resize the text box as per need
- Select **sticky note**  from the annotation tool bar, click on the page where note should appear and write note in the text window.
- Select **Highlight**  from the annotation tool bar, drag across the area to be highlighted
- Select **Free hand line**  from the annotation tool bar, click on the image and drag around the area to be covered
- Select **Stamp**  from the annotation tool bar, click on the image where stamp should appear. Select an existing stamp

Annotations can be saved by clicking on **save** button or by closing the IDM viewer and clicking **Yes** in the confirmation dialog box.

Unlinking document

Select **Unlink** checkbox of the selected document to mark document for unlinking and save. The document will be unlinked from active Siebel row and is removed from the **List View**. Unlinked document, however, will continue to exist in FileNET Library with the same document-id.



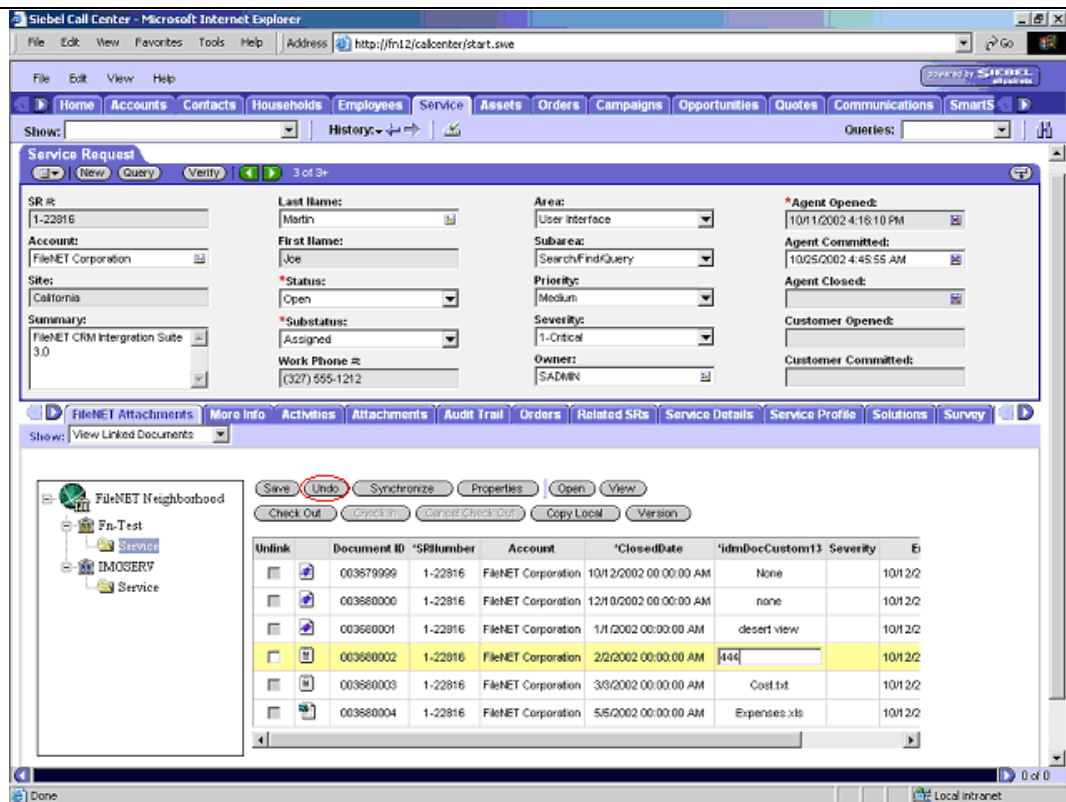
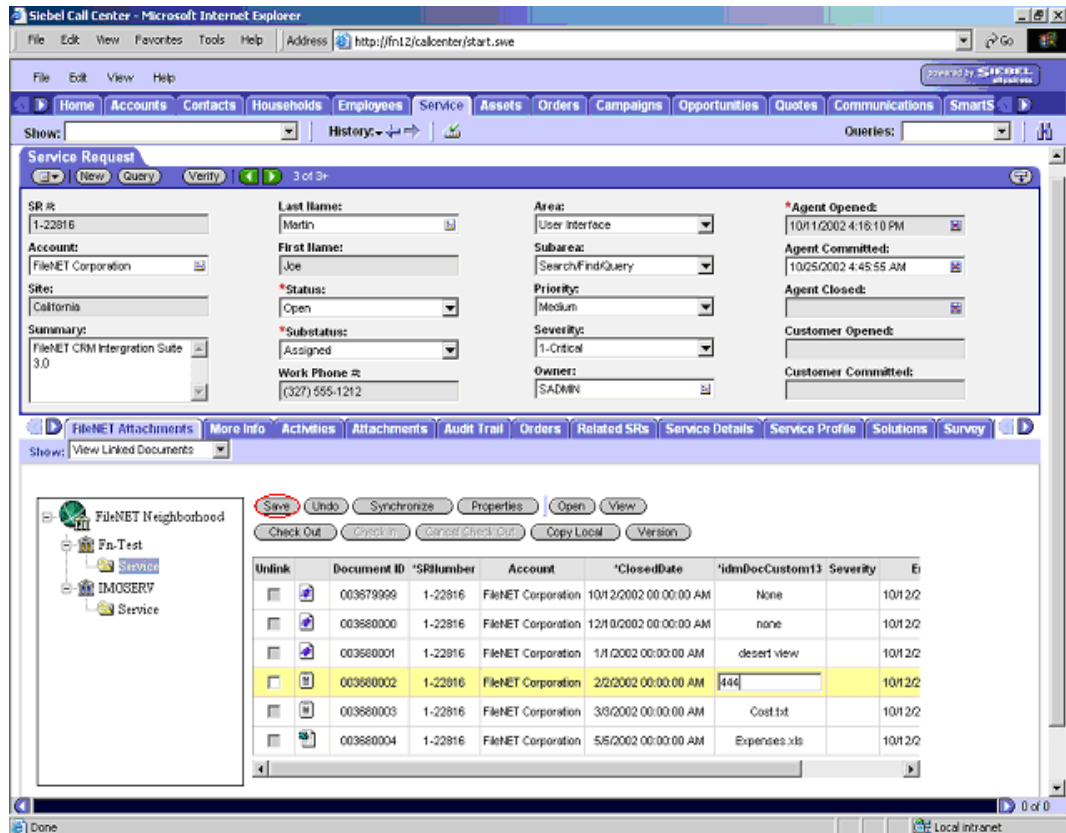
Saving / Undo Changes

The steps to save updates explained above depends on the mode CIS application is configured:

Standard Interactive Mode: This mode allows user to make changes in **List View** and save all the changes by clicking on **Save** menu option. Clicking on **Undo** will revert all the changes done by the user.

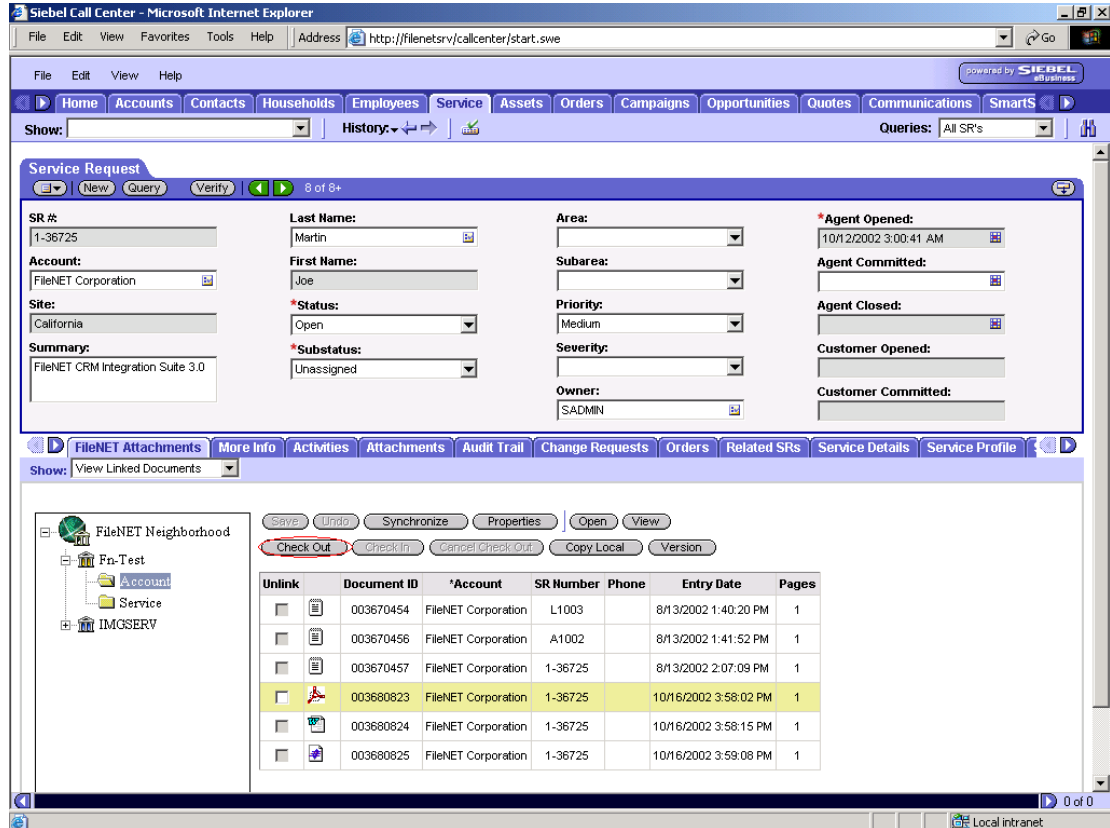
High Interactive Mode: This mode save the changes when user selects any other row in the **List View**, DocClass in the **Tree View** or by clicking on **CIS buttons**. Clicking on **Save** menu option can also save the changes. Clicking on **Undo** will revert changes for the selected row only.

Note: If user selects any other Siebel View tab or CIS option from **Show** drop down list without saving the changes, the changes will be lost.

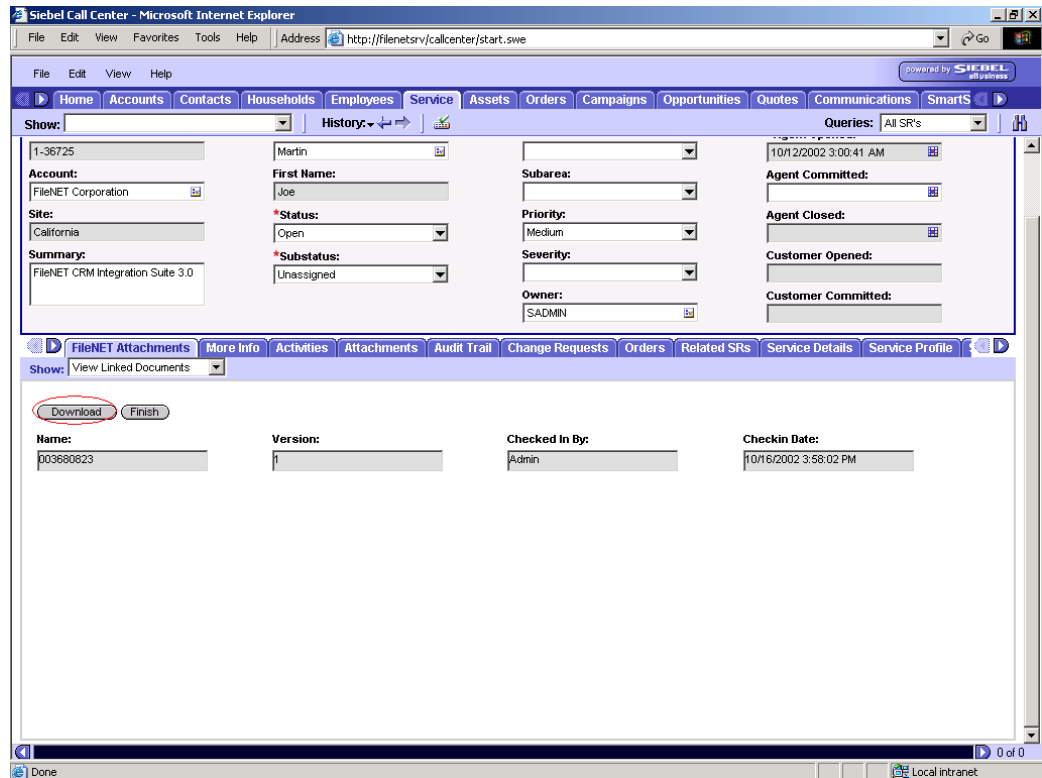


Check in / Check out of documents

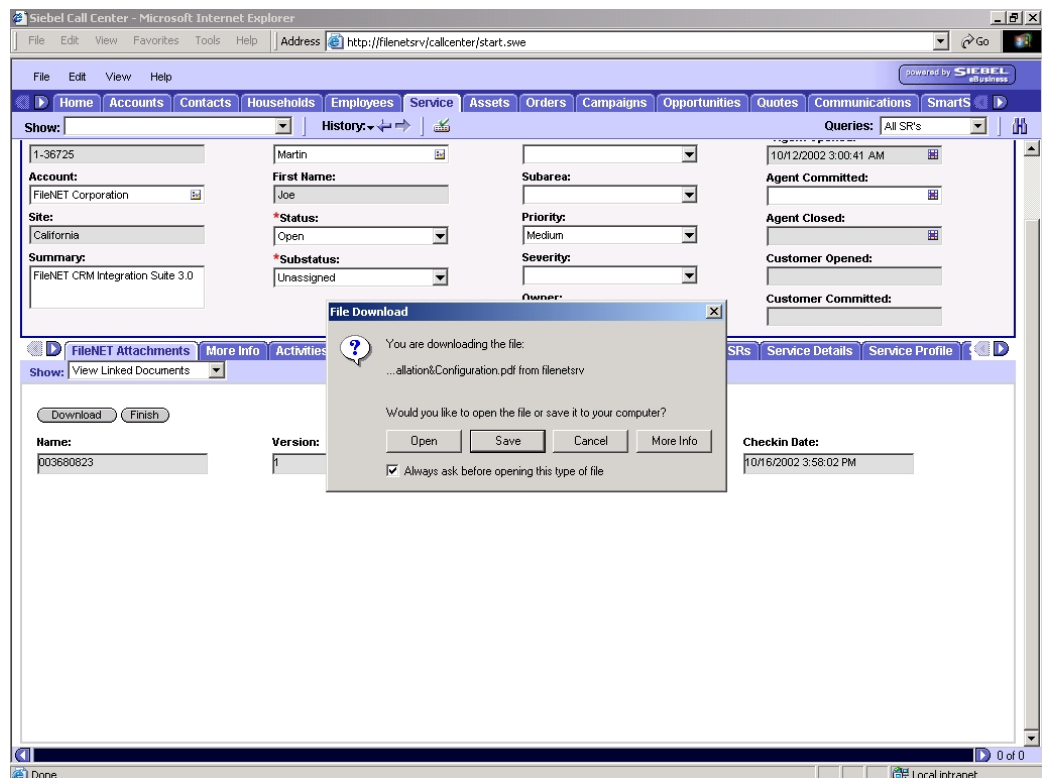
Checkout: Check out operation can be performed only on documents stored in CS Library. To check out a CS document, user must have an Author or higher access rights.



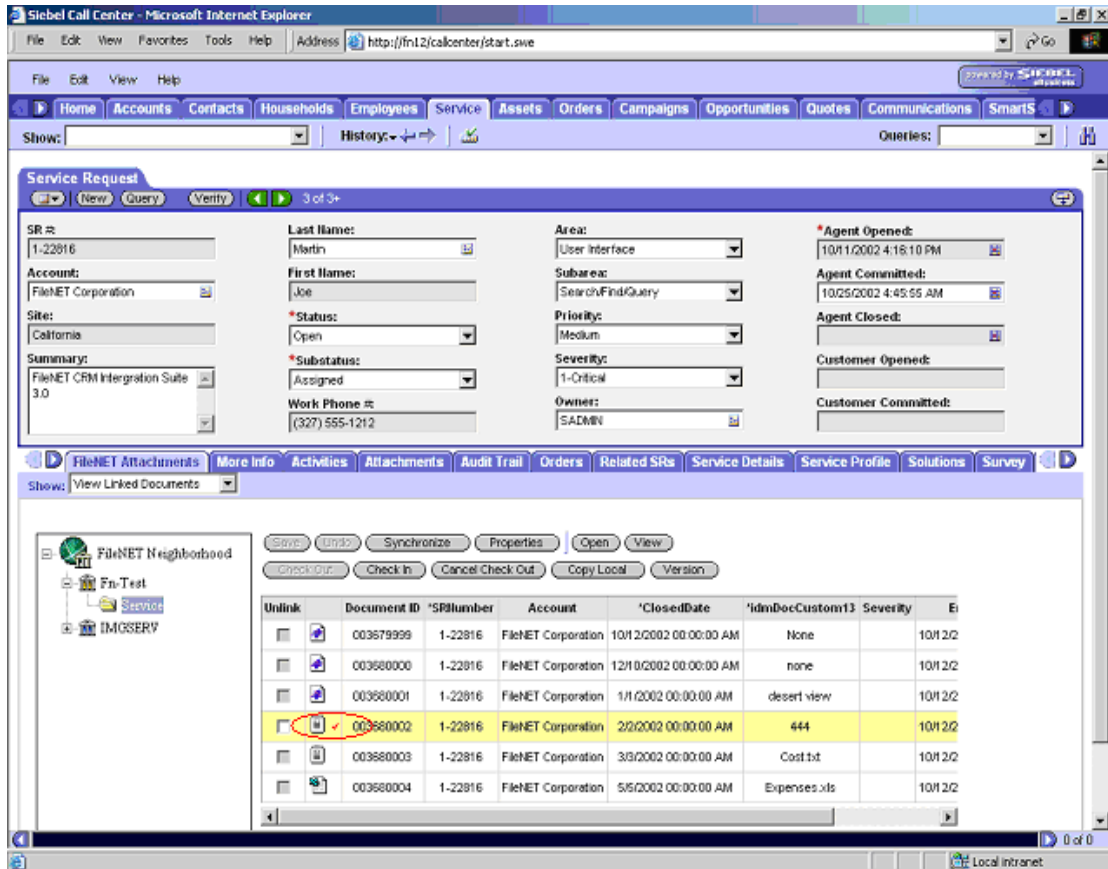
To check out a document, select the document by highlighting the record from document list view. Click on **Checkout** button. The document is marked as checked out and the following screen appears to download the document to local disk.



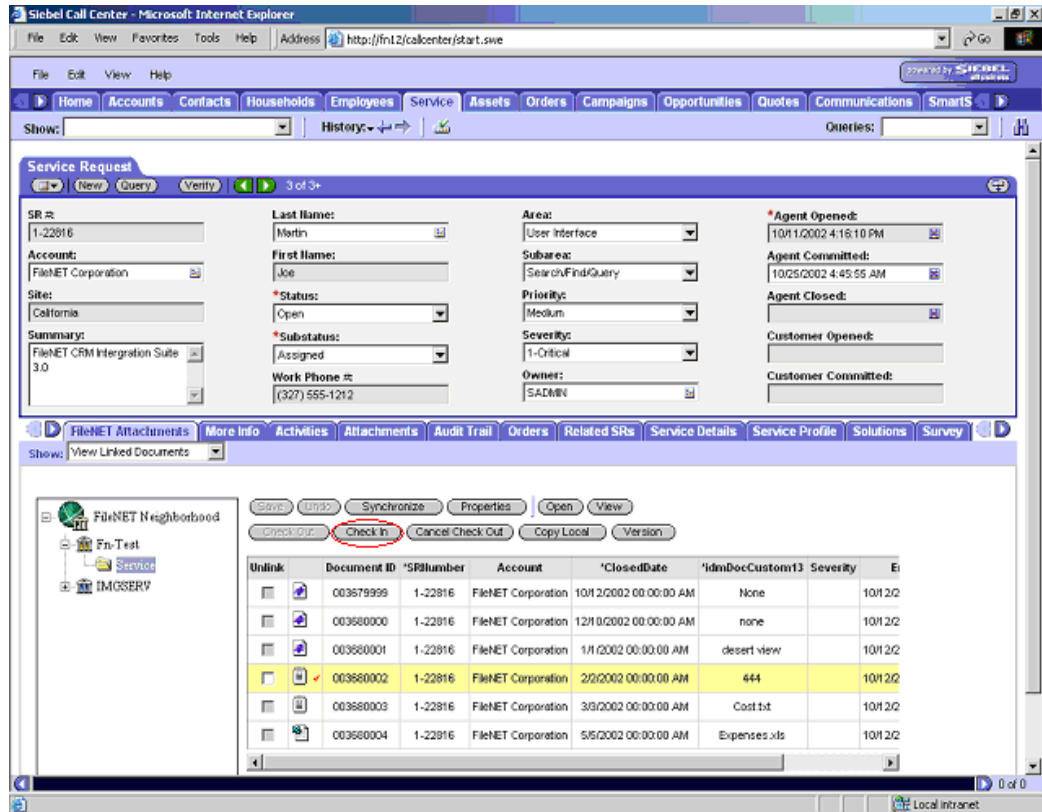
Click on Download to copy latest version of document to local disk. On Click, Browser will prompt whether to **open** the file from its current location or **save** the file to disk. To apply checkout without opening /saving the document click on **Finish** Button.



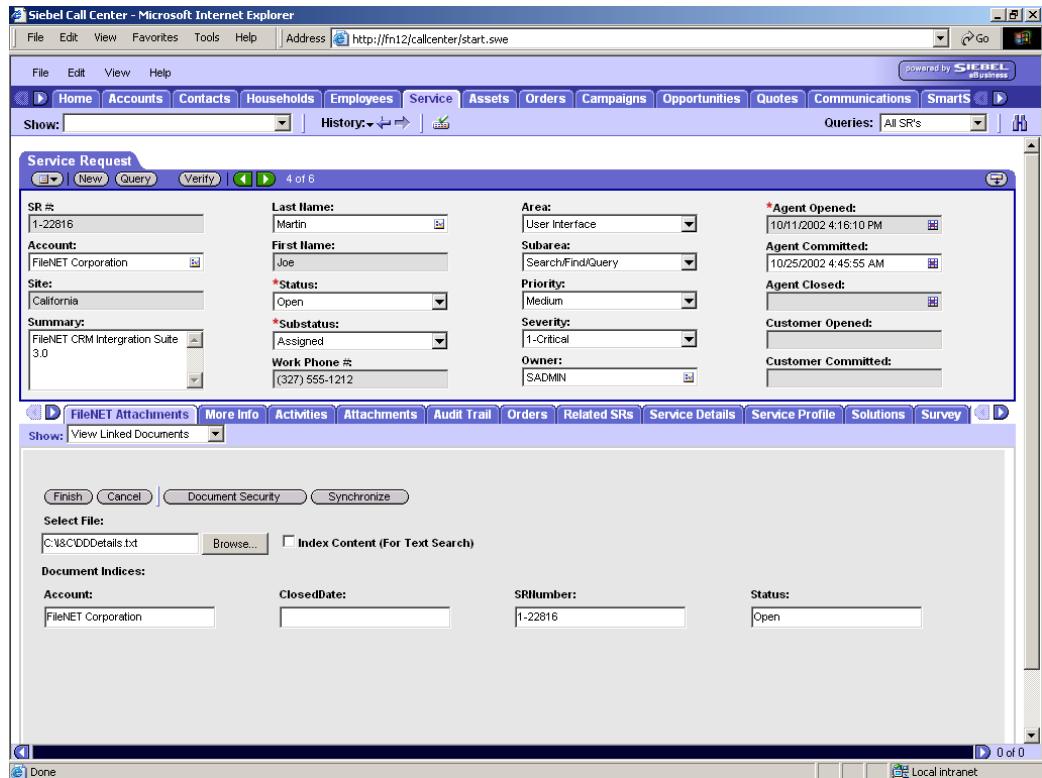
A red check mark will appear besides the document type icon indicating that document is checked out. Only one person at a time can have the document checked out.



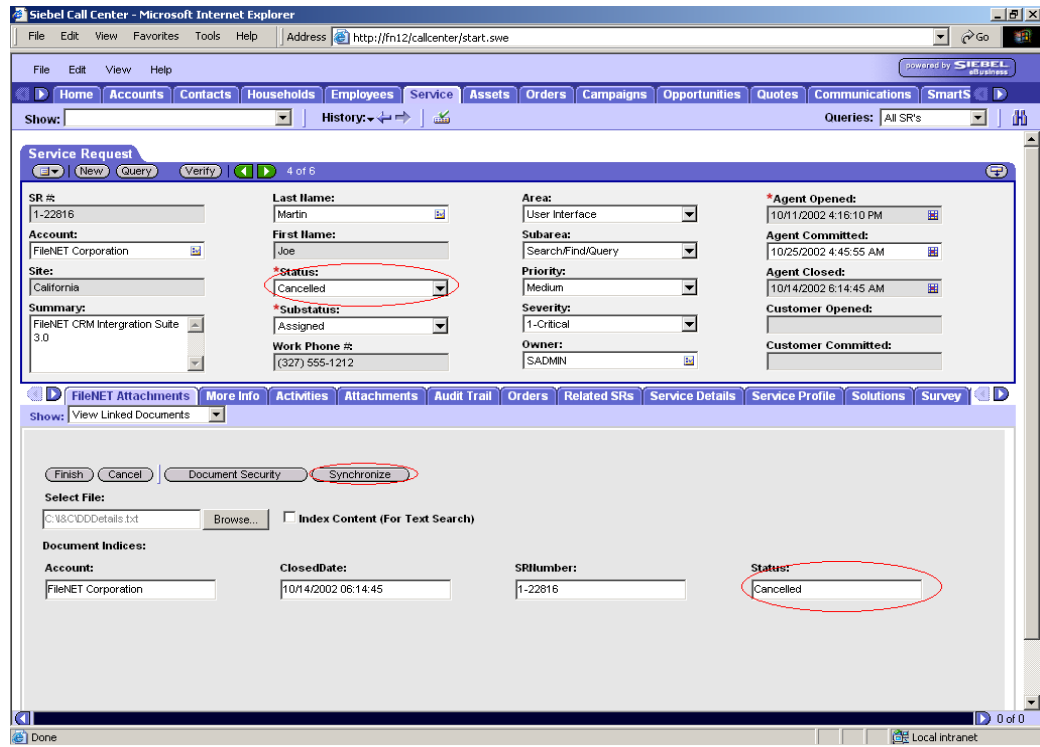
Check In: Checking in the modified document creates a new version of the document. To check in a document, select the row and click on **Check In** button.



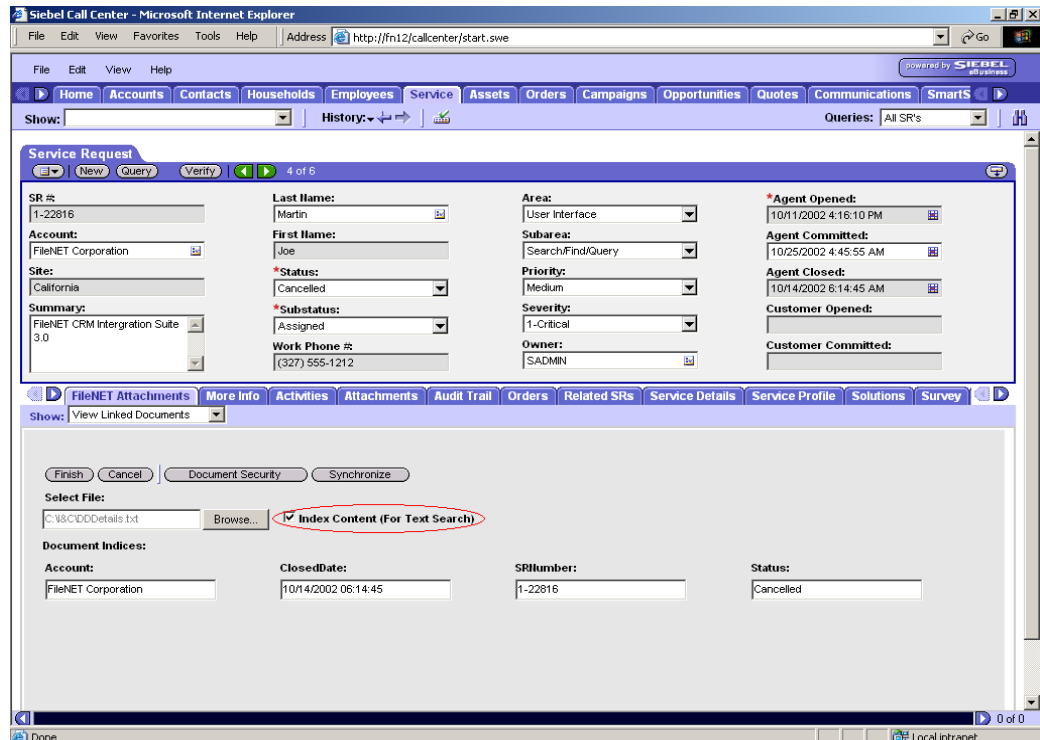
Following screen will appear on the click of the **Check In** button.



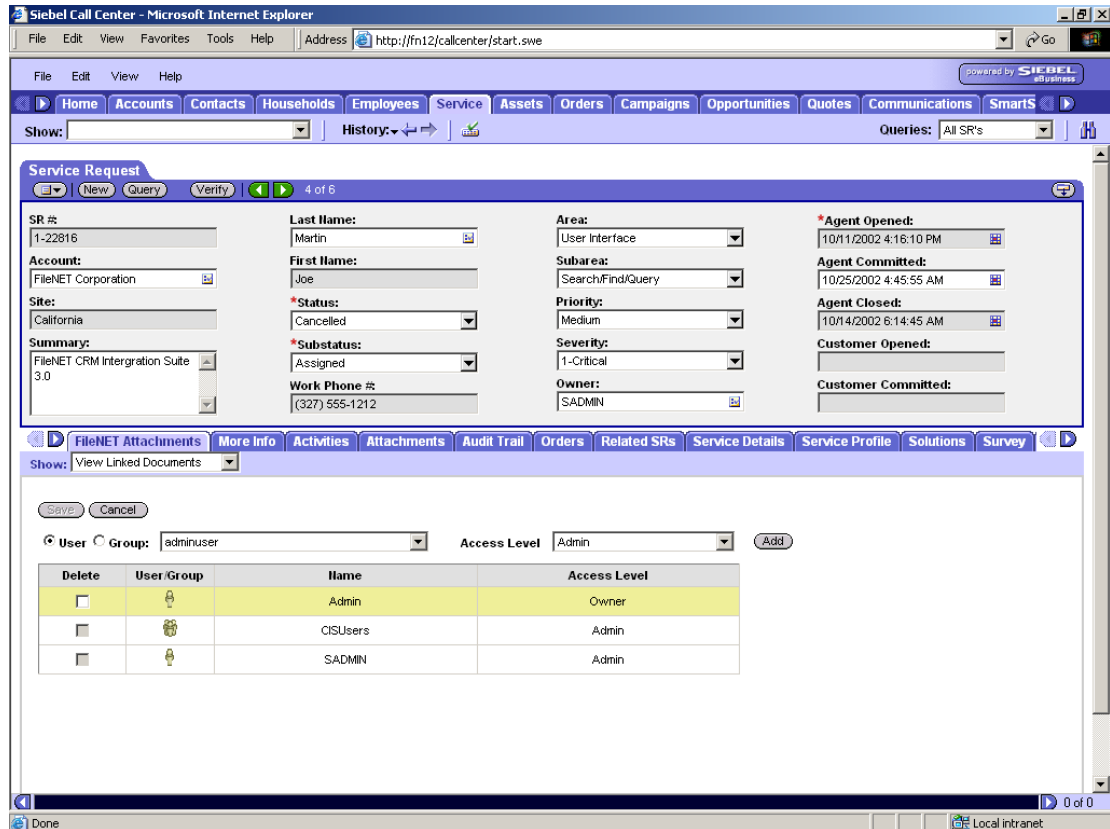
Browse to select file to be checked-in. Existing configured document indices field values will be displayed for values to be updated. To synchronize these indices values with the mapped Siebel field values click on **Synchronize**.



Select **Index Content (For Text Search)** check box, to index document content for content search.



To modify document security, click of **Document Security** button, following document security screen will appear.

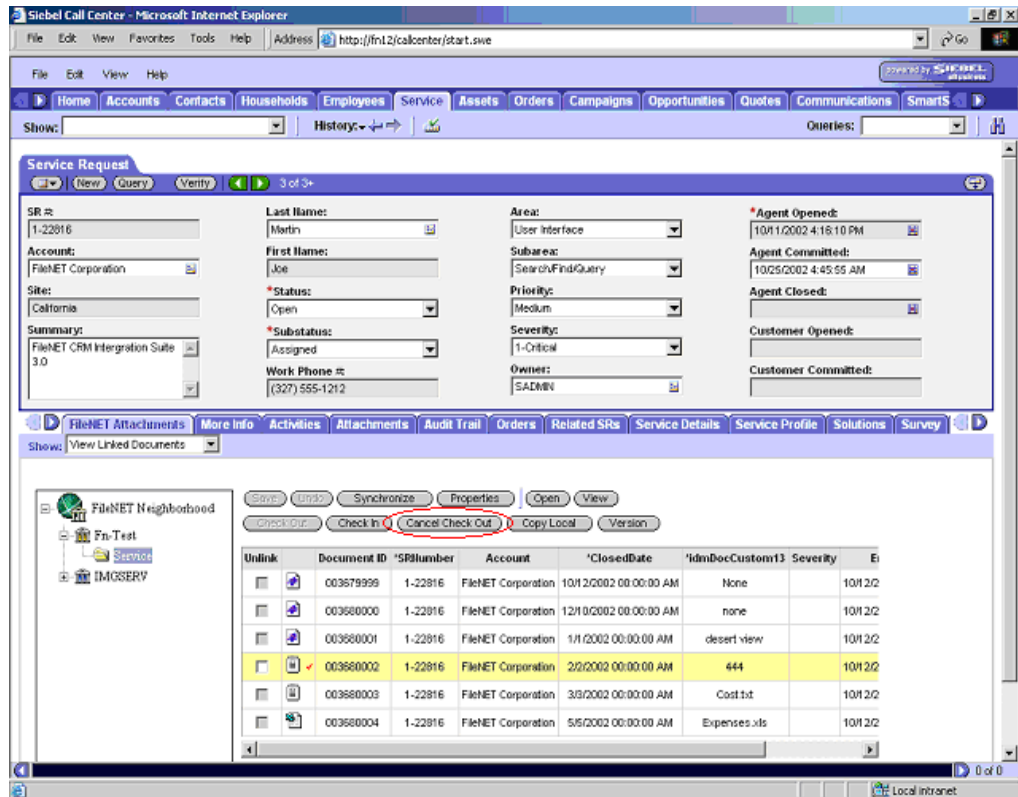


Modify security for the document and click on **Save** button. Click on **Save** will return to **Checkin** screen.

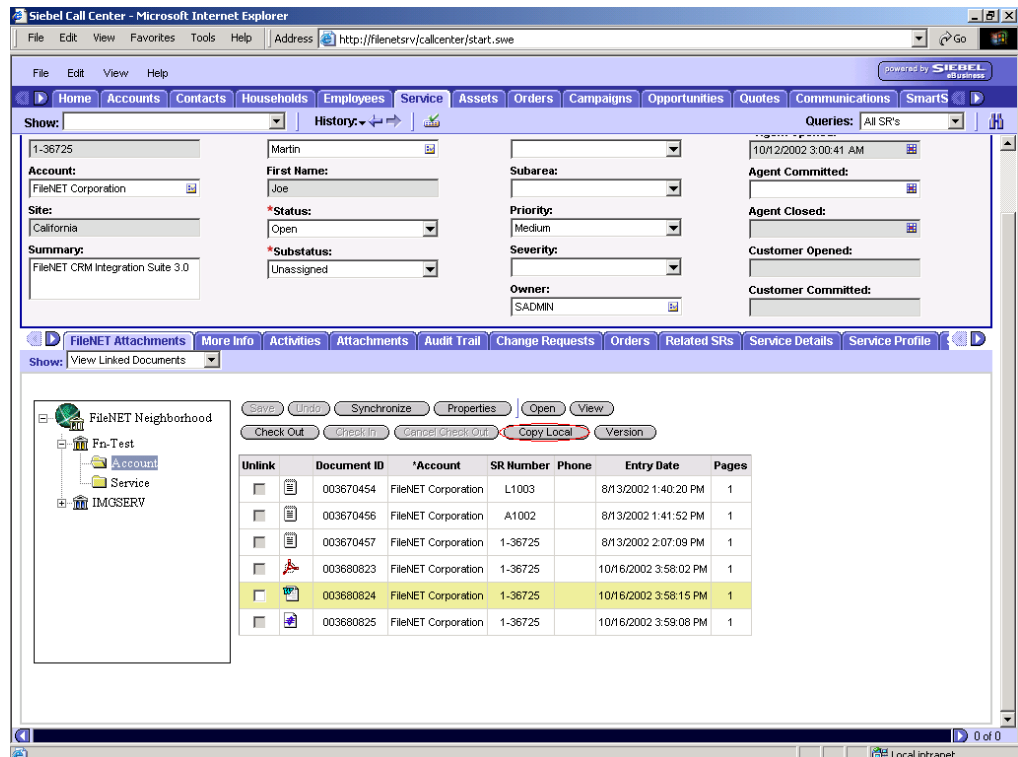
Note: Refer to Properties menu Option section for steps to define document Security for document.

Click on **Finish** to complete the checkin process. View linked documents screen will appear.

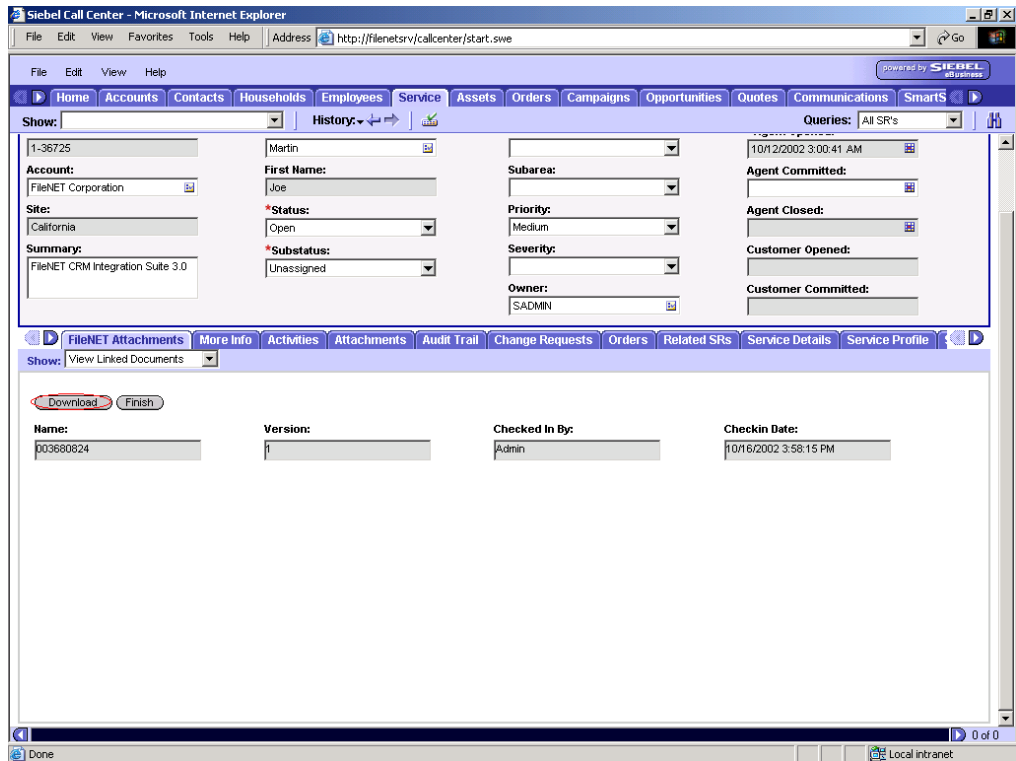
Cancel Check out: To cancel check out, select the document from **list view** by selecting it and click on **Cancel Check Out** button, checked out status will be removed. Document will get unlocked for other users to check out. In addition, the red check mark besides the document type image will disappear.



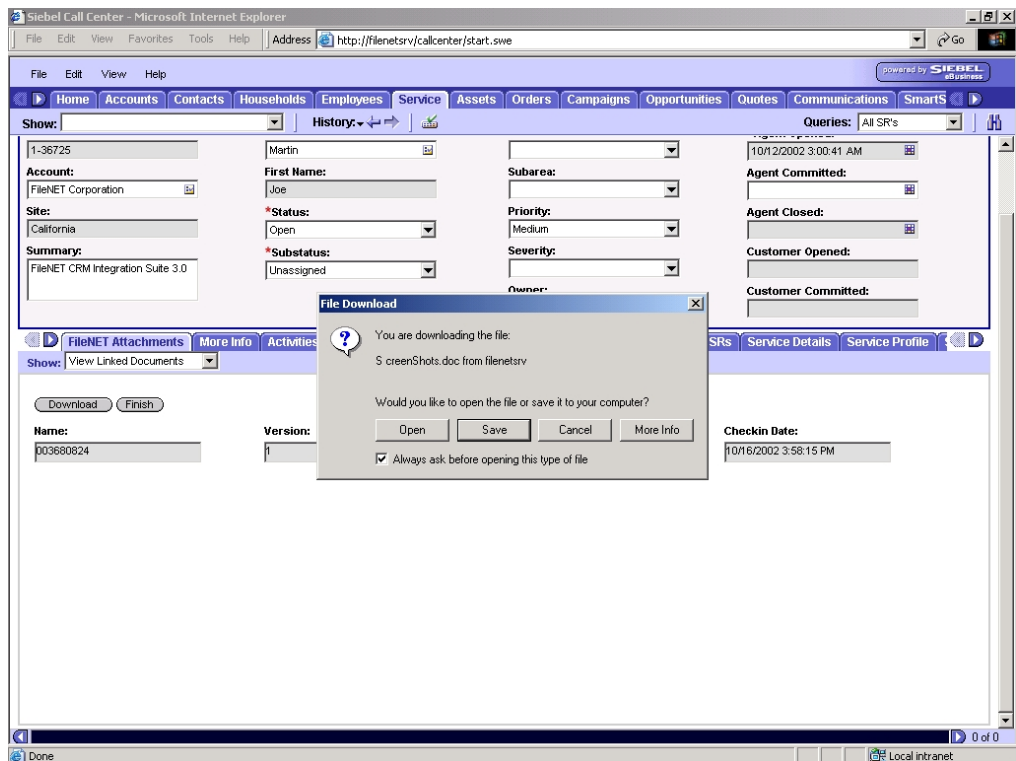
Copy Local: To copy a linked document locally click on **Copy Local** button of view linked document screen. To copy a CS document, Viewer or higher access rights to the document is required.



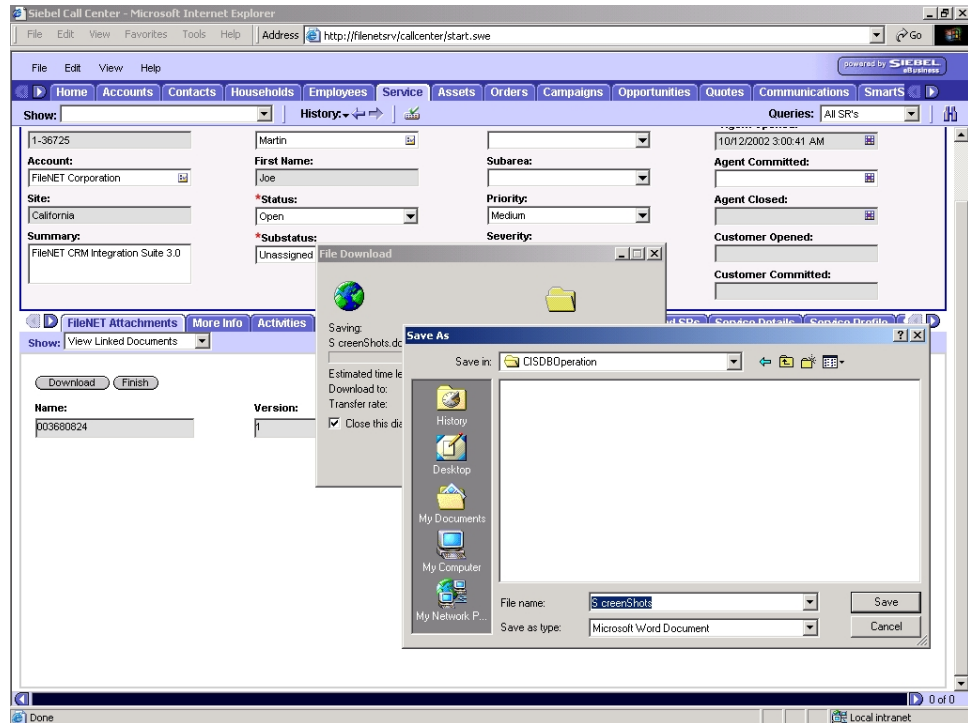
Click on Copy local button to local copy of the linked document.



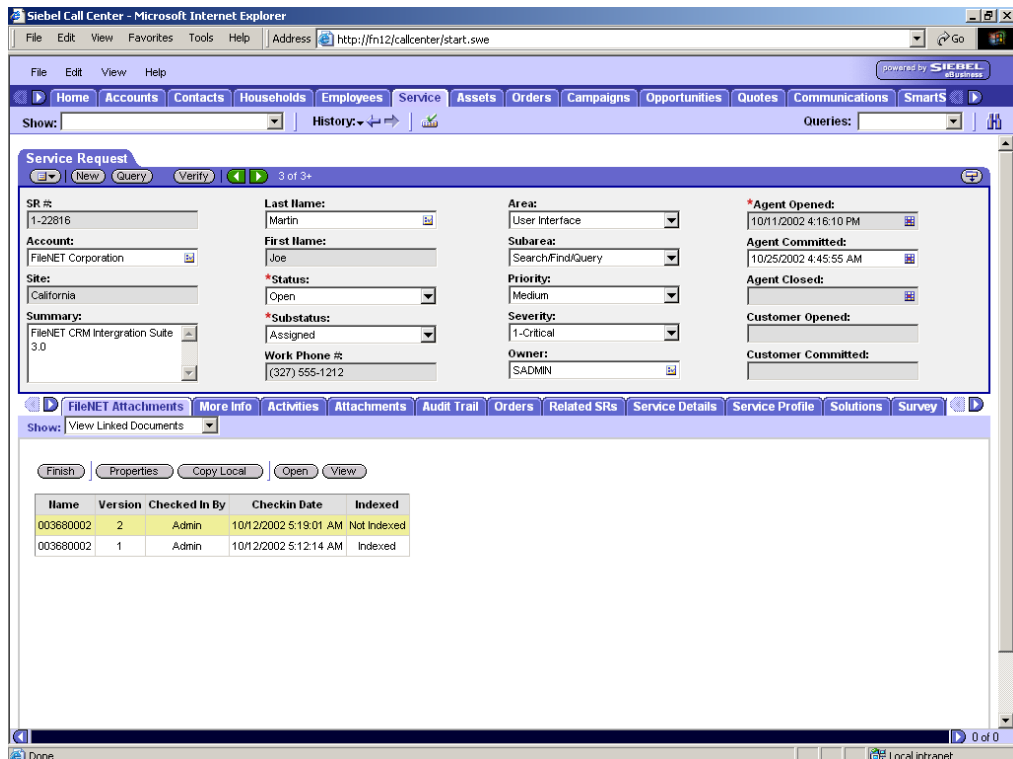
Click on **Download** to copy latest version of document to local disk. On Click, Browser will ask whether to **open** the file from its current location or **save** the file to disk.



Choose the location to save the document and click on **Save** button. The document will be downloaded to the specified folder.



Versions: Displays all available versions of the selected document. In addition to the name and version number, the screen provides information like the name of the user who checked in the version, check-in date and indexing status.

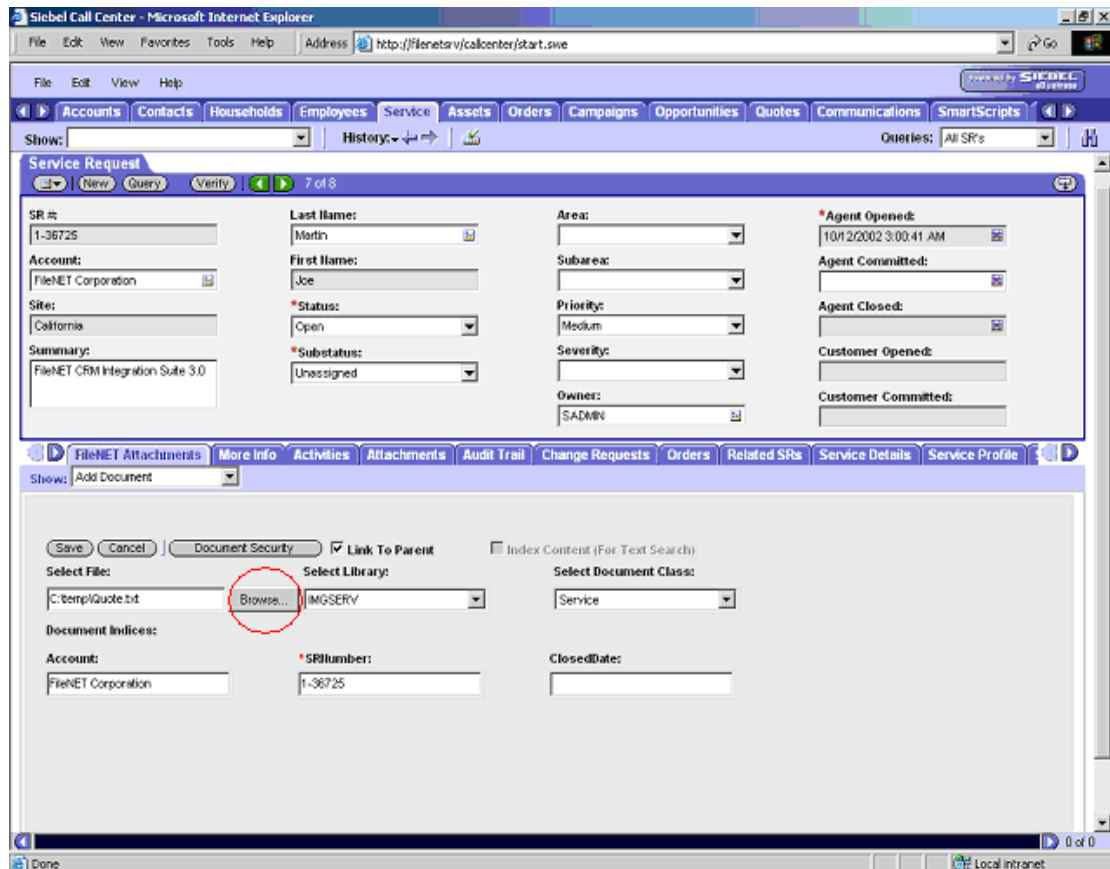


User can view, open and copy any of these versions of the document by selecting the version and clicking on **Open**, **View** or **Copy Local** button respectively. To view properties of a document, click on **Properties** button.

Add Document

This provides the functionality to add a document in FileNET repositories. The document is linked to the active Siebel row. Following are the steps to add and Link a document:

- Select a Siebel row for which you want to add a document.
- Click **FileNET Attachments** view under the **Service** screen tab. By default, the **View linked documents** option lists previously linked document with the active Siebel row.
- Select **Add Document** option from the **Show** drop-down list.

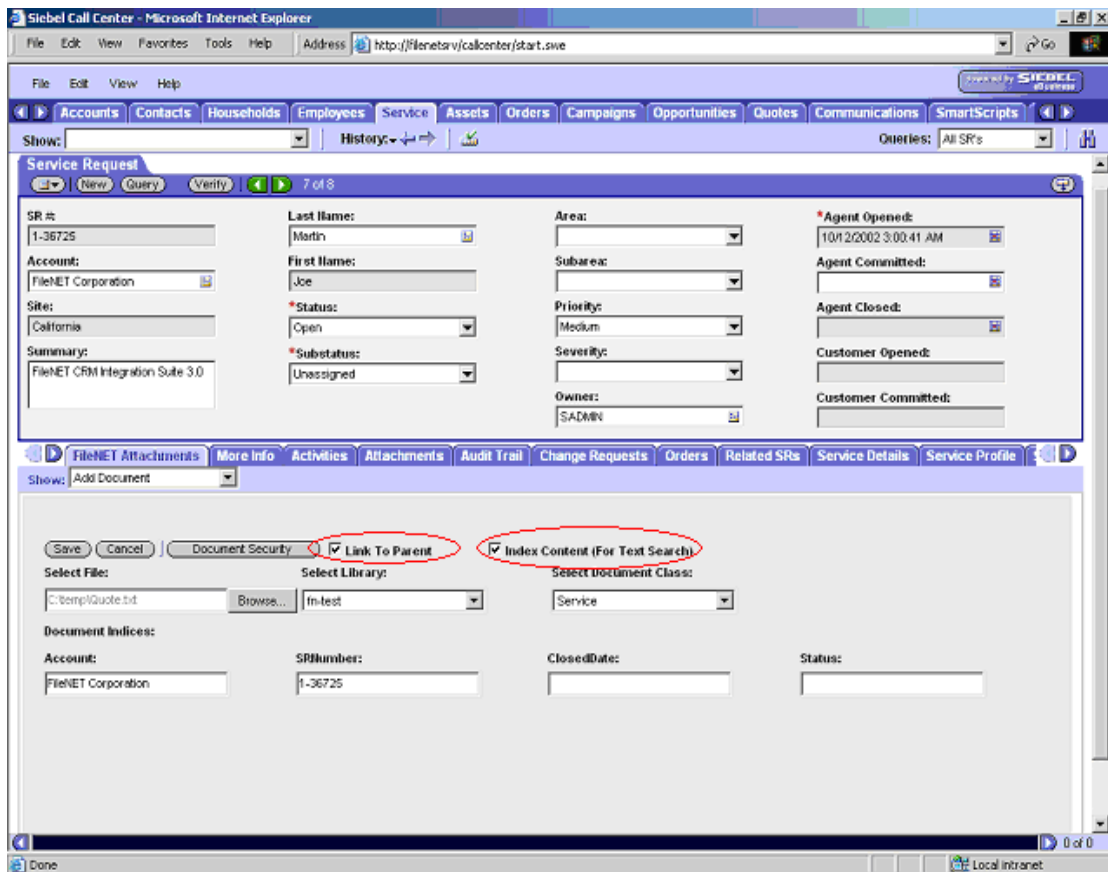


- Click on **Browse** button to select a document to be added into the FileNET library. The **Choose File** dialog box is displayed. Select a file and click **Open**. The selected filename is displayed in **Select File** text box.
- User can specify filename with its complete path in **Select File** text box.
- Select a FileNET library, in which the selected document is to be added, from the **Select Library** drop-down list.

- Select a document class, to which the selected document will belong, from the **Select Document Class** drop-down list. The drop-down list displays all the configured document classes that belong to the selected FileNET library. On selecting a document class, the Document Indices are displayed.

If the document indices are mapped to Siebel fields, their values are auto filled from the active Siebel row. An asterisk (*) prefixed to any document indices denotes that value must be provided for the document index.

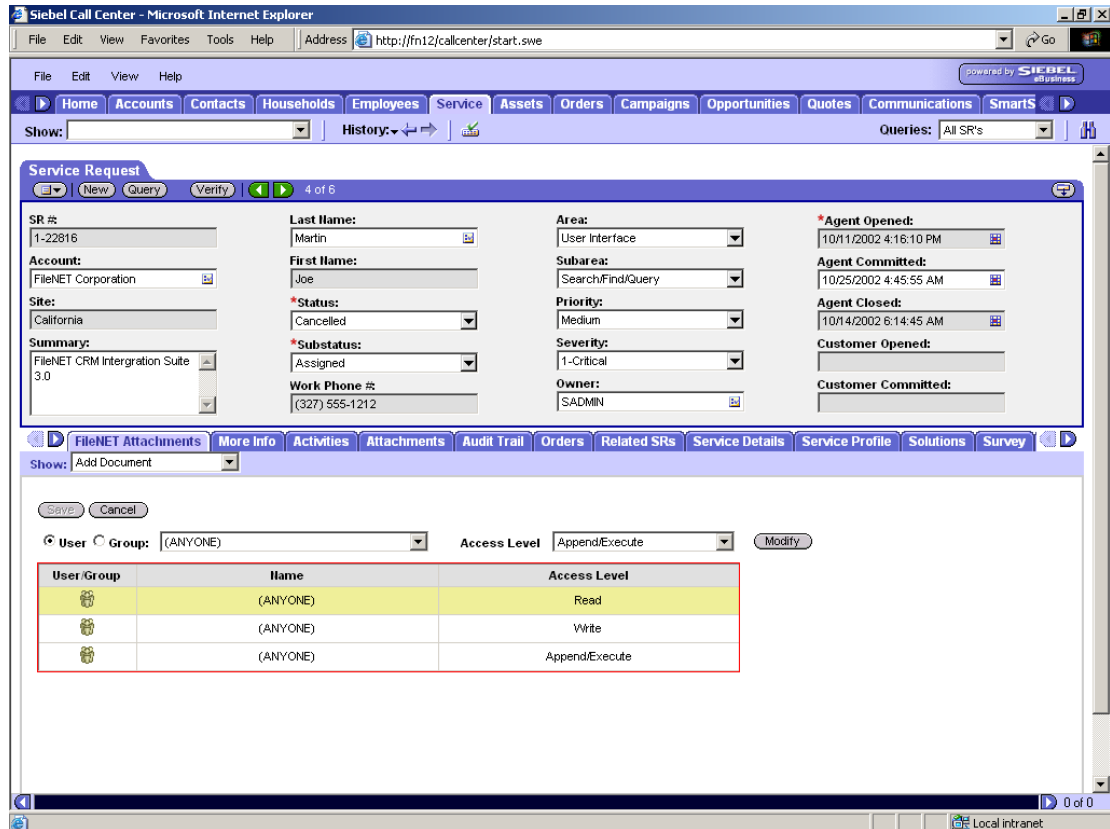
- Check the **Link to Parent** check box to link the document to parent row of active Siebel record. This option is disabled if no parent Business Component is defined for the current Business Component, and Docclass is not configured for the parent Business component.
- If the library selected in the **Select Library** field is **Content Services (CS)** library then document to be added can be indexed for text-based search. To enable text-based search on the document, check the **Index Content (for Text Search)** check box.



Note: Index Content (for Text Search) check box is disabled for Image Services (IS) Libraries.

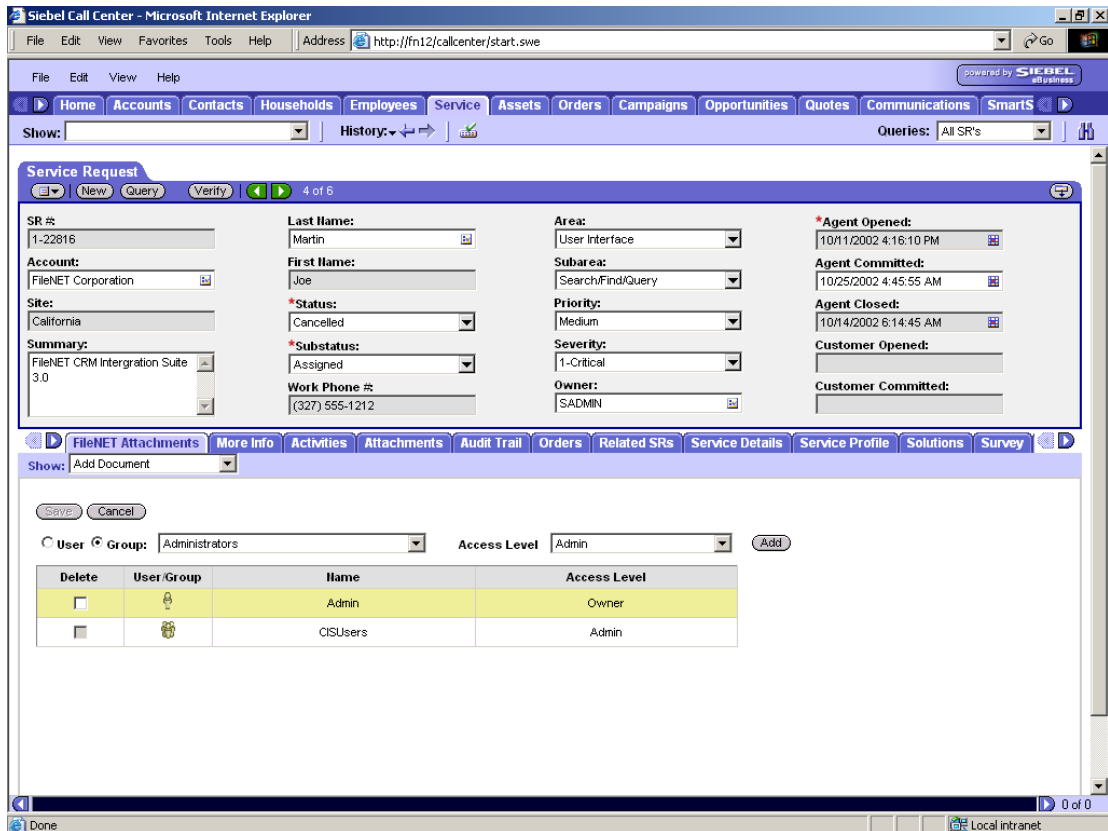
- Click on **Document Security** to specify access control (security settings) for the document being added.

If the library selected is an Image Services library, **IS Document Security screen**, is displayed



If the library selected is a **Content Services library**, CS Document Security screen is displayed

- For the document being added to Image Services Library, read, write, and append access rights are given to all the users by default. For each access right there is one row in IS Document Security screen. The access rights for the document can be modified by selecting desired combination of user / group and access level and click on **Modify**.



- For the document being added to Content Services Library, the logged-in FileNET user gets owner rights by default. For changing the rights follow the steps in the section **Defining security for CS document**
- To save the details specified to add and link a document, click **Save**. A unique Document ID is generated and displayed. **Add Document screen** is refreshed.
- To cancel Add operation, click **Cancel**.

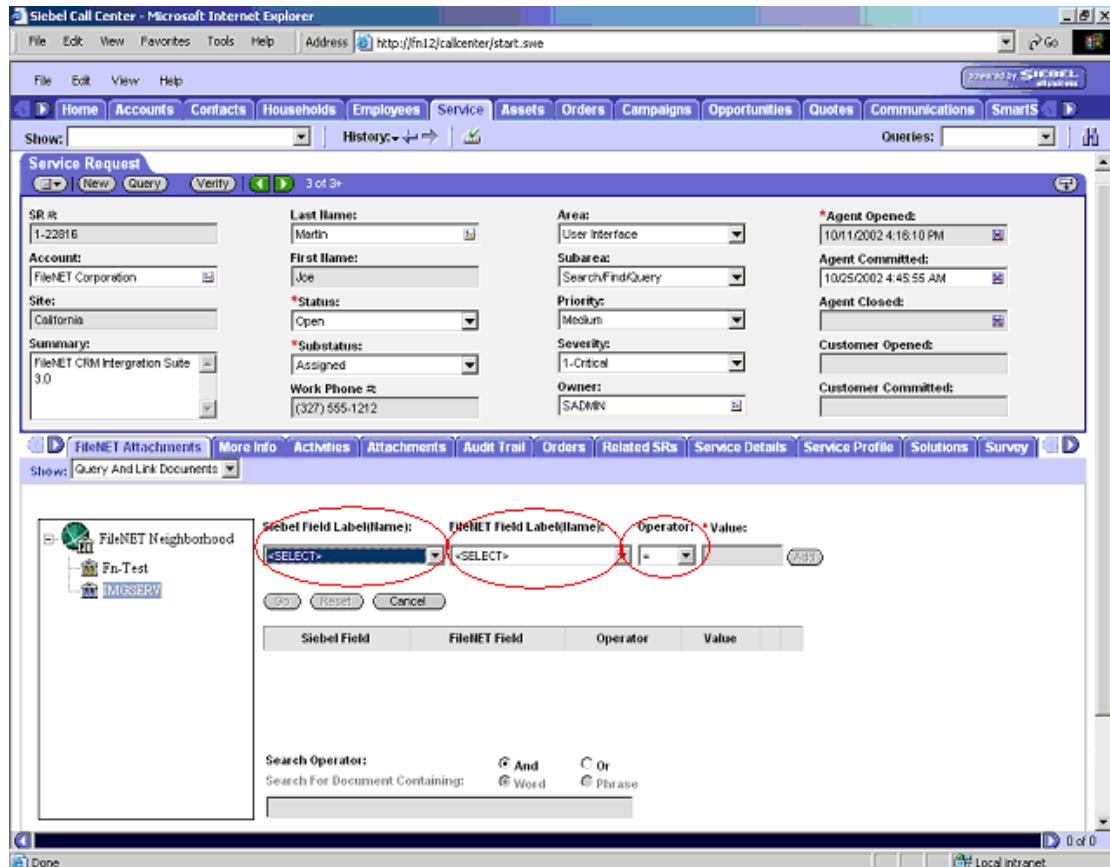
Note: When the details are saved, the document is stored in the specified document class under the specified library with the specified index values. A unique Document ID is generated.

Query and Link Documents

CIS application allows query on multiple FileNET libraries including combination of Image Services and Content Services Libraries on a single click. CIS application allows user to define query criteria against multiple FileNET libraries by selecting library from **Tree View**. The following are the steps to define Criteria, view / Link the Documents: -

1. Refer to **Accessing CIS Operations** for steps to access CIS application.

2. Select **Query and Link Documents** from Show drop-down list.
Search Documents screen is displayed. In this screen FileNET libraries are displayed in a **Tree View**.
3. Select the library, in the **Tree View**, on which the search is to be performed.



4. Select the Siebel Field from Siebel Field Label (Name) drop-down list. FileNET Field Label (Name) drop down is populated with the mapped FileNET Fields and the value is copied from the currently selected Siebel row into Value field. Select required FileNET field from FileNET Field Label (Name) before proceeding.

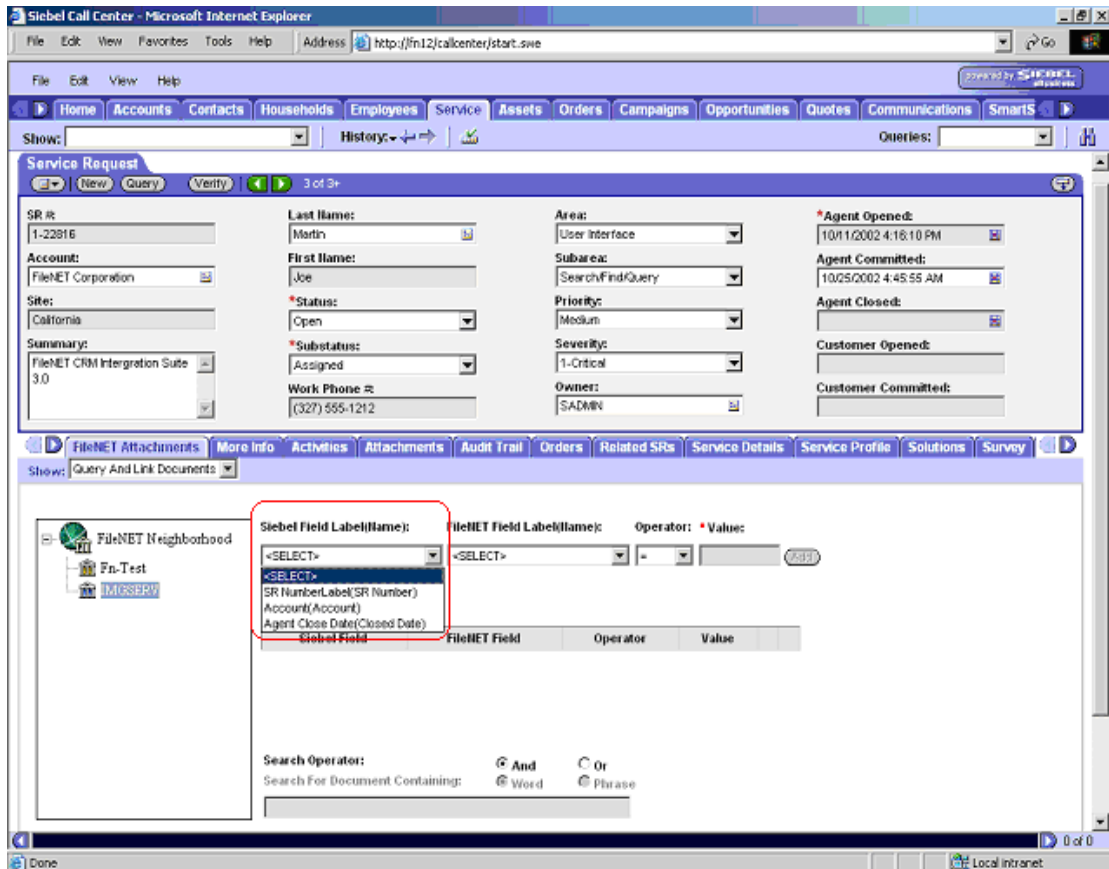
Note: Siebel Field Label (Name) drop down consists of configured Siebel field entries displayed in the format “Siebel Field Label concatenated by Siebel field name in a parenthesis”.

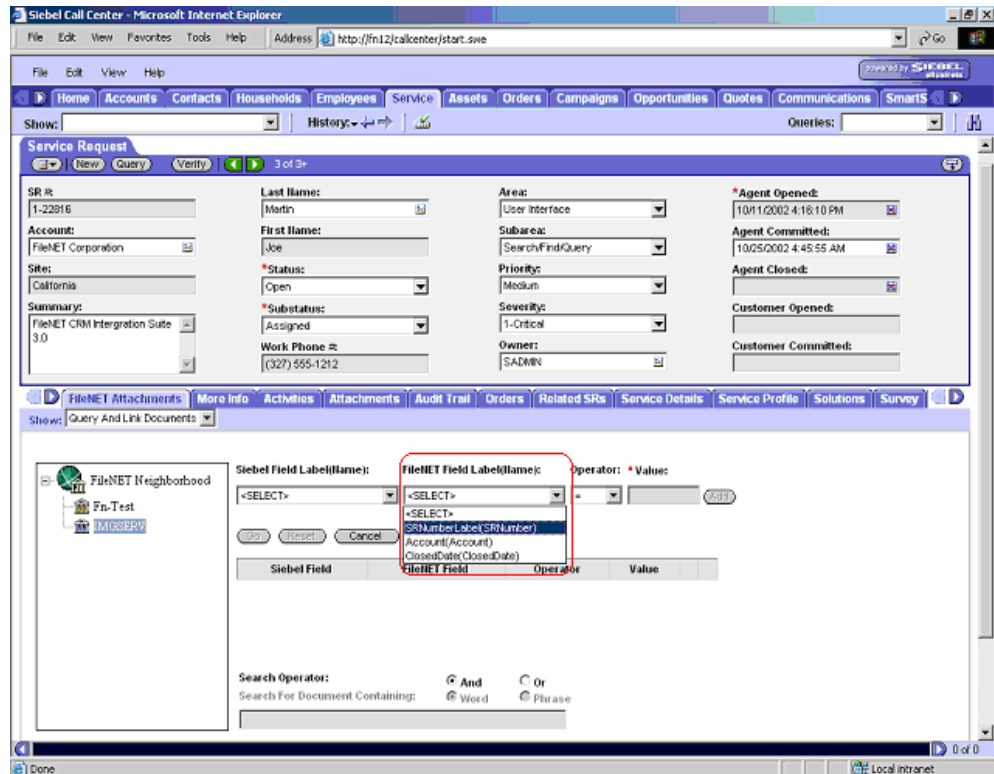
Similarly, FileNET Field Label (Name) drop down consists of configured FileNET field entries displayed in the format “FileNET Field Label concatenated by FileNET field name in a parenthesis”.

5. Alternatively select FileNET field from **FileNET Field Label (name)** drop down.
Siebel Field Label (Name) drop down will get populated with the mapped Siebel

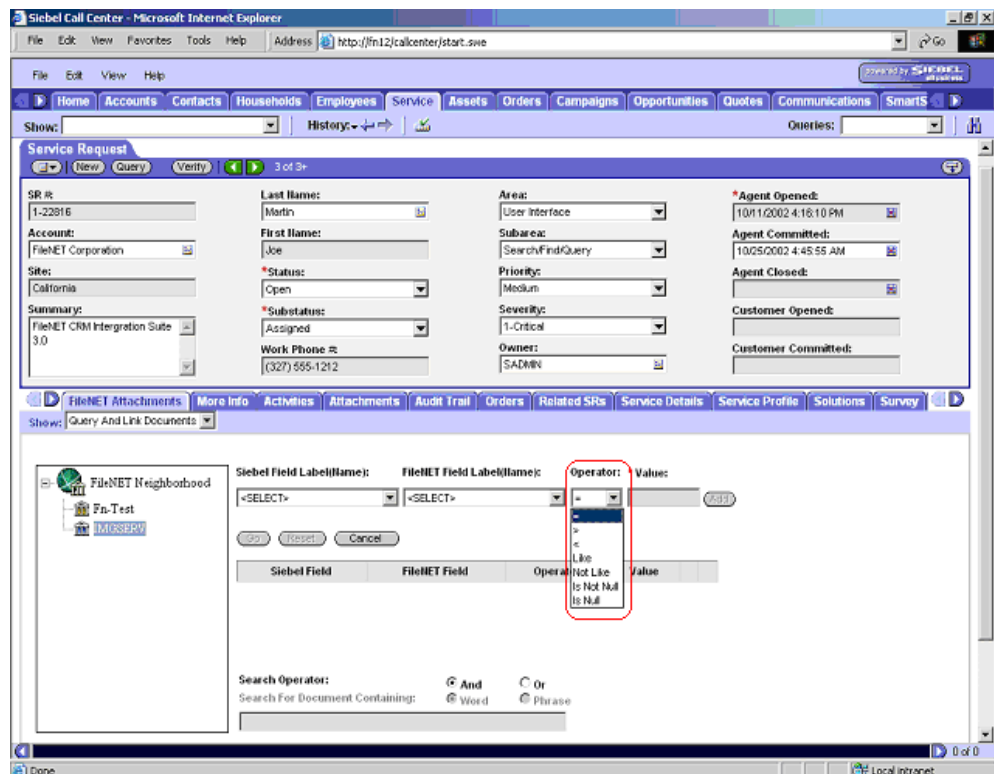
Fields. Select Siebel field from **Siebel Field Label (Name)** drop down, value field will get populated from the field value of the active Siebel row.

6. Click on **Cancel** button to refresh **FileNET Field Label (name)** drop down and **Siebel Field Label (Name)** drop down. Click on **Reset** and **Add** button will also result in refreshing these drop downs.

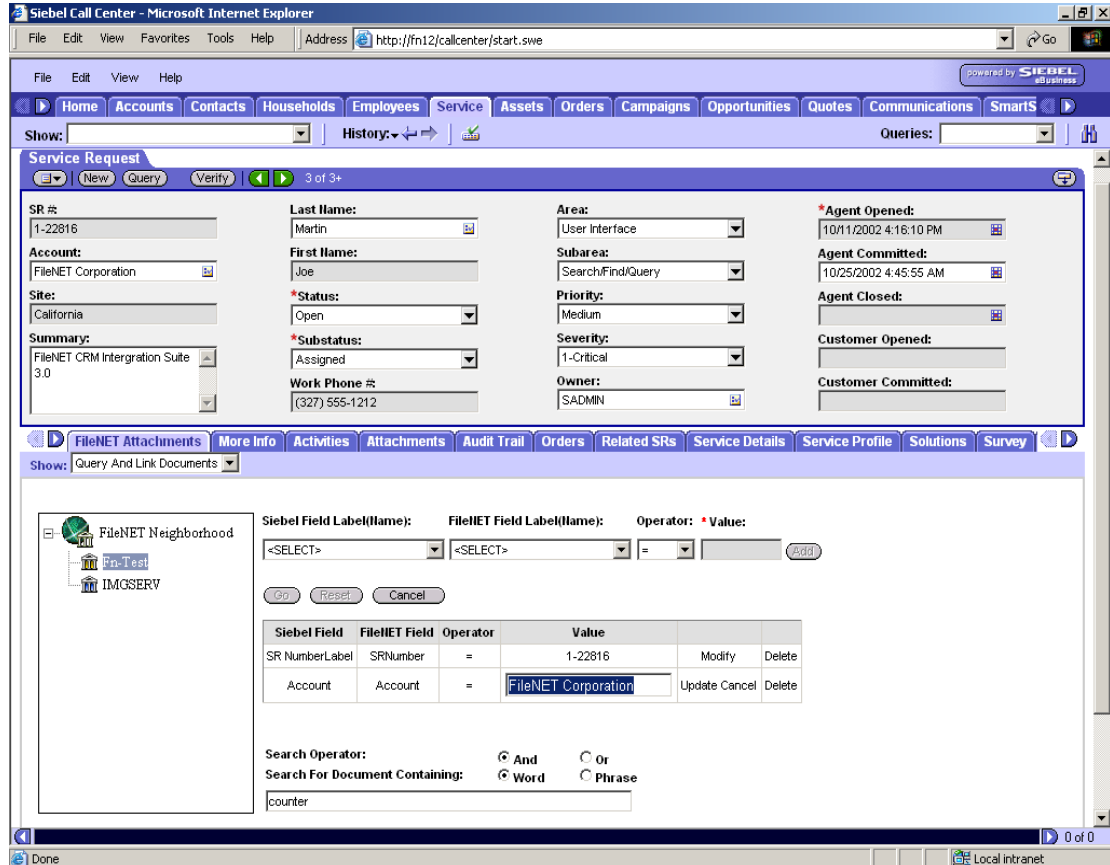




7. Select the value of **Operator** from the drop-down list. The values for the selection are = (equal to), > (greater than), < (less than), **Like**, **Not Like**, **Is Null**, and **Is Not Null**.



8. The **Value** text box contains the value of mapped Siebel field from the currently selected Siebel row and is mandatory. User can change this value.
9. Click **Add**. The search criteria specified is added in the list.



Note: You can modify or delete the search criteria added in the list. To modify or delete search criteria, refer to section Modify the Search Criteria and Delete the Search Criteria respectively.

10. Repeat steps 4 to 8 for all the search criteria you want to add for the library.

Note: You can specify the multiple search criteria on multiple libraries. Perform the steps 3 to 9 for specifying multiple search criteria on multiple libraries.

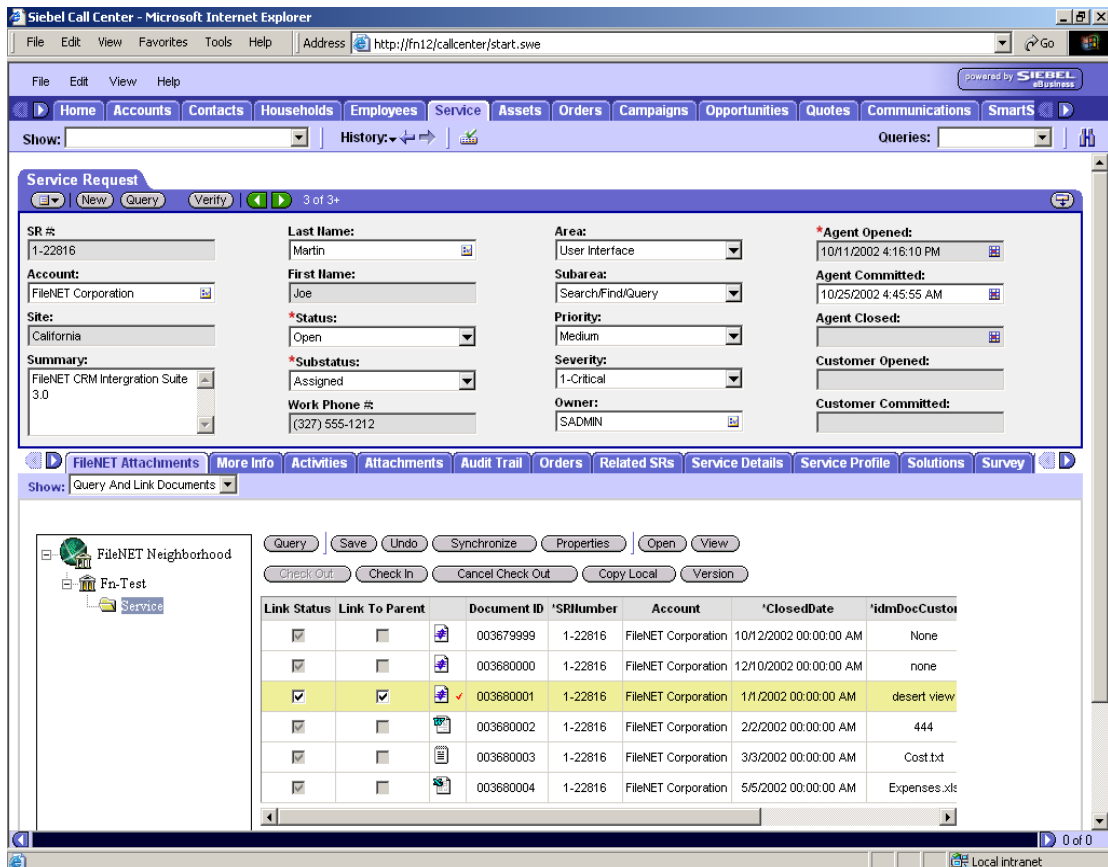
11. Select the value for **Search Operator**. The search operator are 'And' and 'Or'.
 If you select the **And** radio button, Only those documents are displayed in Search results which meet all the search criteria. If you select 'Or' radio button, all those documents are displayed in Search results, which meet any one of search criteria.

12. Select the value for **Search For Document Containing**. The values for the selection are 'Word' and 'Phrase'. Then enter the word or phrase in the text box.

Note: This field is available for selection only if the FileNET library you have selected is a content services library. This content search will be performed on all documents in the Content Search Library for which you have specified the Index Content (for text search) option while adding the document.

13. Click **Go**. **Search Result screen** is displayed. For performing the operations on the searched result, refer to section [Operations on Searched Document](#).

Note: To reset the search criteria list, click **Reset** and to cancel the search operation, click **Cancel**.



Modify the Search Criteria

To modify the values in search criteria, perform the following steps:

1. Click **Modify** in the second last column of the row in the search criteria list, whose value you want to change.

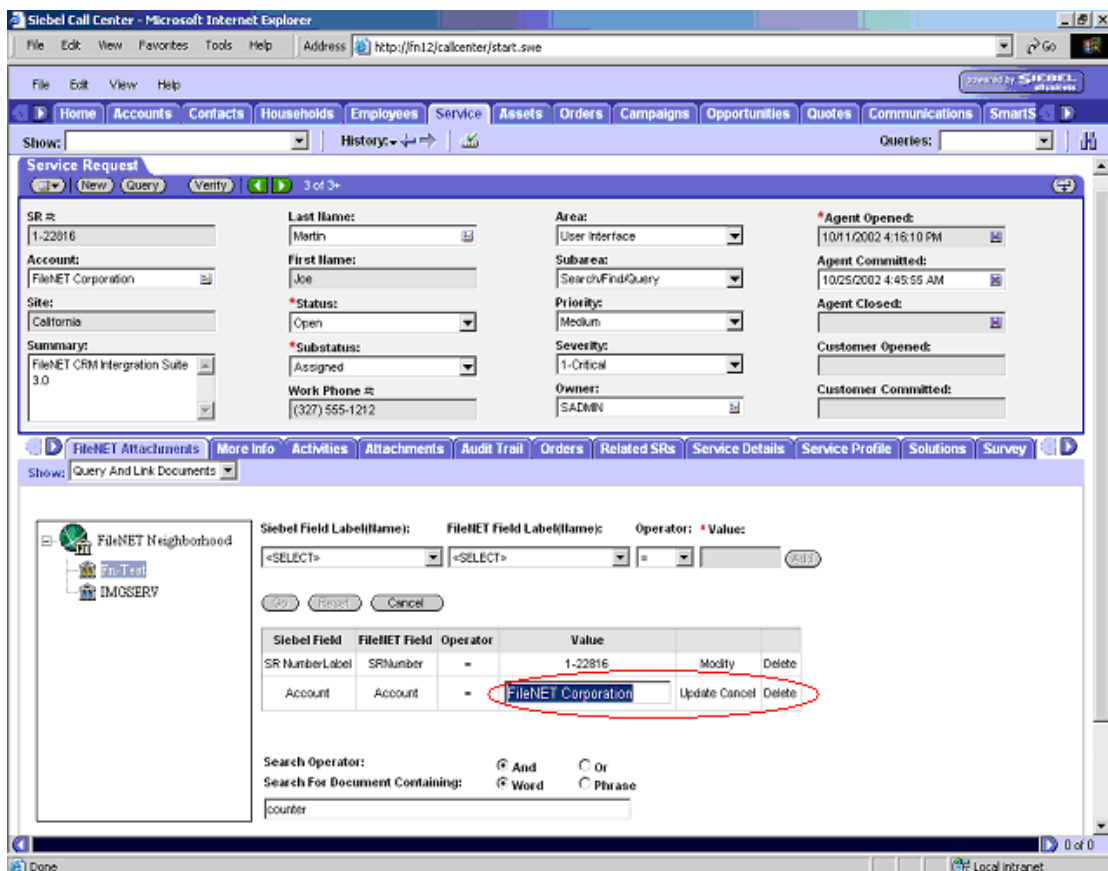
Modify Search Criteria screen is displayed. Only the search value is allowed to modify.

2. Modify the search value.
3. Click **Update** in the second last column in the search criteria list.

The search value is updated and is reflected in the search criteria list.

If you do not want to modify the search value or ignore the changes, click **Cancel** in the second last column in the search criteria list.

4. Repeat steps 1 to 3 for all the search criteria you want to modify.



Delete the Search Criteria

To delete the search criteria you want, click **Delete** in the last column of the row in the search criteria list. The search criterion is deleted from the list.

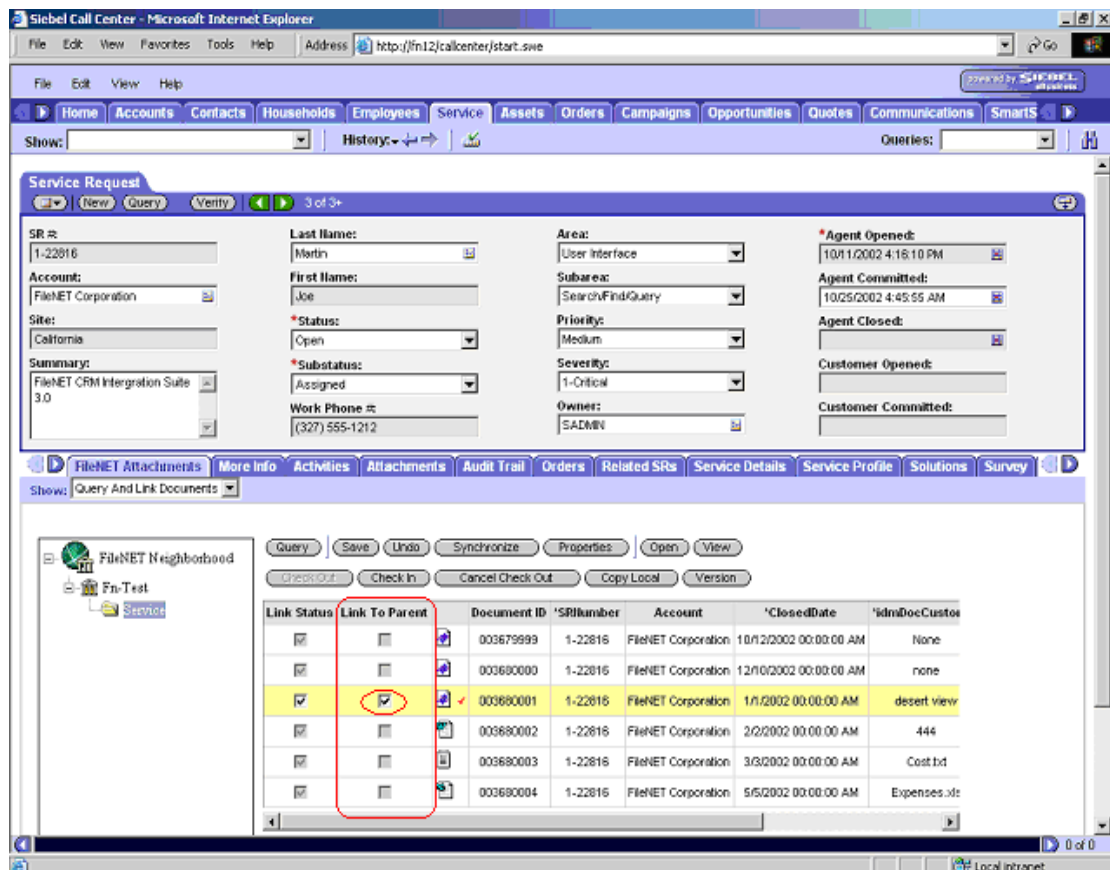
Operations on Searched Documents

Following operations can be performed on the searched documents (Refer to View Linked Document section for details):

- ❑ [View documents](#)
- ❑ [Updating document and properties](#)

Update links of the documents to parent row of active Siebel Row

1. Select the document class from the **Tree View** in the **Search Result** screen. The searched documents under the selected document class are displayed next to **Tree View**.
2. To link the document to parent business component of the active Siebel Business Component, check **Link To Parent** check box.



3. Click **Save**. The status of all the documents is updated. To undo the changes click on **Undo** button.

Going back to Search Screen

1. Click on **Query** Button to go back to **Query and Link Screen**.

Trouble Shooting

CIS-1001

Message

No records found in CIS database.

Possible locations/situations of Occurrence

On All screens.

Cause of Occurrence

Improper database configuration.

Handling (The steps a user needs to take when the error occurs)

Contact System Administrator mentioning the error code and location of occurrence.

CIS-1002

Message

Unable to logon into CIS database.

Possible locations/situations of Occurrence

On load of the following pages:

- View Linked Document Screen.
- Add Document Screen.
- Query & Link Screen.

Cause of Occurrence

Either of below:

- Incorrect Configuration Settings i.e. Invalid Database UserID & Password or Incorrect Database Name or Server Name.
- Or if the Database Server is not available.

Handling (The steps a user needs to take when the error occurs)

Contact System Administrator mentioning the error code and location of occurrence.

CIS-1003

Message

Parent business component not properly configured in CIS database

Possible locations/situations of Occurrence

While saving in

- Add Documents
- Query and Link Documents

Cause of Occurrence

Parent Business Component not properly defined in CIS application.

Handling (The steps a user needs to take when the error occurs)

Contact System Administrator mentioning the error code and location of occurrence.

CIS-1005

Message

Unable to link document to the parent Siebel row

Possible locations/situations of Occurrence

While saving in

- Add Documents
- Query and Link Documents

Cause of Occurrence

Parent Business Component not properly defined in CIS application.

Handling (The steps a user needs to take when the error occurs)

Contact System Administrator mentioning the error code and location of occurrence.

CIS-1006

Message

Parent business component not configured in CIS database

Possible locations/situations of Occurrence

While saving in

- Add Documents
- Query and Link Documents

Cause of Occurrence

Parent Business Component not properly defined in CIS application.

Handling (The steps a user needs to take when the error occurs)

Contact System Administrator mentioning the error code and location of occurrence.

CIS-1010

Message

Unable to populate field values; Siebel logon failure

Possible locations/situations of Occurrence

On Add Document Screen – When a Document Class of a FileNET Library is selected to add a document.

On Query & Link Screen - – When Search Criteria is being defined.

Cause of Occurrence

CIS application failed to log on to Siebel Server

Handling (The steps a user needs to take when the error occurs)

Contact System Administrator mentioning the error code and location of occurrence.

CIS-1019

Message

Insufficient rights to perform the operation

Possible locations/situations of Occurrence

On View Linked Docs Screen, Add Docs Screen & Searched Result Screen.

Cause of Occurrence

When a user with insufficient rights tries to update document properties or view a document.

Handling (The steps a user needs to take when the error occurs)

Get access rights updated.

CIS-1020

Message

Business component not configured

Possible locations/situations of Occurrence

On load of View Linked Documents, Add Documents, Query & Link Documents screens.

Cause of Occurrence

Business component is not configured for CIS application.

Handling (The steps a user needs to take when the error occurs)

Contact System Administrator mentioning the error code and location of occurrence.

CIS-1022

Message

Unable to create record in FileNET library

Possible locations/situations of Occurrence

On Add Document Screen – On Click of **Save** Button.

Cause of Occurrence

- Invalid File
- FileNET Library not accessible

Handling (The steps a user needs to take when the error occurs)

Verify the path & name of file selected for Add

Contact System Administrator mentioning the error code and location of occurrence.

CIS-1027

Message

Select a document to proceed

Possible locations/situations of Occurrence

On click of **Save & Document Security** button on Add Document Screen.

On click of **Finish & Document Security** button on Check In screen

Cause of Occurrence

No file is selected for Add or Check In.

Handling (The steps a user needs to take when the error occurs)

Select a valid File

CIS-1028

Message

Value required for <FileNET Field Name>

Possible locations/situations of Occurrence

On click of **Save** button on Add Document Screen.

Cause of Occurrence

User leaves a blank value for a mandatory field and clicks on **Save** button.

Handling (The steps a user needs to take when the error occurs)

Enter valid values for all mandatory fields and then click on **Save** button.

CIS-1029

Message

Invalid value entered for session timeout

Possible locations/situations of Occurrence

On click of 'Apply' button on CIS Configuration tool.

Cause of Occurrence

Self-explanatory.

Handling (The steps a user needs to take when the error occurs)

Enter valid values for Session timeout field.

CIS-1039

Message

Invalid FileNET credentials provided

Possible locations/situations of Occurrence

On FileNET Logon Screen.

Cause of Occurrence

When user provide invalid FileNET UserID or password and clicks **Ok** button.

Handling (The steps a user needs to take when the error occurs)

Provide valid User ID & Password.

CIS-1044

Message

FileNET logon operation cancelled for Library

Possible locations/situations of Occurrence

On click of **Cancel** button on FileNET Logon Screen.

Cause of Occurrence

User cancelled the Logon operation.

Handling (The steps a user needs to take when the error occurs)

None.

CIS-1047

Message

Invalid logon credentials

Possible locations/situations of Occurrence

On Configuration tool logon Screen & FileNET logon screen.

Cause of Occurrence

When User Enters invalid User id & password.

Handling (The steps a user needs to take when the error occurs)

Enter valid logon credentials.

CIS-1050

Message

Unable to read configuration settings

Possible locations/situations of Occurrence

On Error Page.

Cause of Occurrence

Configuration settings for CIS application is not found.

Handling (The steps a user needs to take when the error occurs)

Contact System Administrator mentioning the error code and location of occurrence.

CIS-1056

Message

Invalid property value

Possible locations/situations of Occurrence

On Add Document Page – On Click of **Save** button.

On Query & Link Screen – On click of **Go** button.

On click of **Synchronize** button on View Linked Document Screen and Query and Link Screen.

Cause of Occurrence

If user enters an invalid value for any field and tries to save that value or query on that value then the error message appears.

Handling (The steps a user needs to take when the error occurs)

Enter valid value for the fields.

CIS-1058

Message

Please specify the search criteria

Possible locations/situations of Occurrence

On Query & Link Screen – on Click of **Go** Button.

Cause of Occurrence

When the user has specified no search criteria.

Handling (The steps a user needs to take when the error occurs)

Specify search criteria and then click on **Go** button.

CIS-1059

Message

Value field cannot be blank

Possible locations/situations of Occurrence

On Query & Link Screen – on click of **Add** Button.

Cause of Occurrence

When user tries to add search criteria without specifying a value in the 'Value' textbox.

Handling (The steps a user needs to take when the error occurs)

Enter some value in the 'Value' textbox.

CIS-1060

Message

Invalid value for FileNET field

Possible locations/situations of Occurrence

On Add Document Screen – On Click of **Save** Button

Cause of Occurrence

When user enters invalid value for any FileNET field.

Handling (The steps a user needs to take when the error occurs)

Enter valid value for the FileNET field.

CIS-1061

Message

Link To Parent operation failed

Possible locations/situations of Occurrence

On click of **Save** button on Add Document Screen when **Link To Parent** check box is checked.

Cause of Occurrence

Parent Business Component not configured properly.

Handling (The steps a user needs to take when the error occurs)

Contact System Administrator mentioning the error code and location of occurrence.

CIS-1066

Message

Session timed out. Please click on FileNET Attachments to resume

Possible locations/situations of Occurrence

On all screens.

Cause of Occurrence

When the session time limit crosses the limit specified by the administrator in the CIS configuration tool.

Handling (The steps a user needs to take when the error occurs)

Click on FileNET attachment View tab to restart

CIS-1068

Message

Document not checked out

Possible locations/situations of Occurrence

On View Linked Document Screen and Searched Result Screen on click of **Check In** button.

Cause of Occurrence

When user tries to check in an already checked in document.

Handling (The steps a user needs to take when the error occurs)

Verify the status of the document to be checked in.

CIS-1069

Message

Document already checked out

Possible locations/situations of Occurrence

On View Linked Document screen and Searched Result screen on click of **Check Out** button.

Cause of Occurrence

When user tries to check out an already checked out document.

Handling (The steps a user needs to take when the error occurs)

Verify the status of the document to be checked out.

CIS-1083

Message

Value required for DocID/ Field Name:

Possible locations/situations of Occurrence

On View Linked Document screen & Searched Result screen, on click of **Save** button.

Cause of Occurrence

No value provided for mandatory field before saving.

Handling (The steps a user needs to take when the error occurs)

Enter valid values for all mandatory fields and then click on 'Save' button.

CIS-1085

Message

Invalid value for DocID/ Field Name:

Possible locations/situations of Occurrence

On View Linked Document screen & Searched Result screen, while saving

Cause of Occurrence

User enters an invalid value for a field and tries to **Save**

Handling (The steps a user needs to take when the error occurs)

Enter valid values for all fields and then click on 'Save' button.