



ACS7 Integration with Siebel Portal Application

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Contents

About this Manual 4

Conventions Used in this Document 4

Education 4

Comments and Suggestions 4

1. ACS7-Siebel Portal Integration 5

Creating Applets 6

Adding Applets to a view 18

Creating Link between CIS VBC and Other Business
Component 22

2. Limitations 26

Appendix A– Software License Agreement 27

About this Manual

This manual provides information about integrating Application Connector for Siebel7 (ACS7) with Siebel Portal Applications. For installation and configuration of ACS7 refer to *Installation and Configuration Manual* for ACS7 3.2a.

Conventions Used in this Document

<u>Convention</u>	<u>Description</u>
Bold type	Indicates the names of buttons, menu names, and other configurable options.
Italic type	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.
Note	Includes information that one might find useful or would want to know about in the given context.
Tip	Includes information one should treat as a general guideline while developing.

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1

ACS7-Siebel Portal Integration

Siebel eService is a customer application. It presents a portal page where customers can quickly access service and knowledge information from a single location. eService users can view details of any specific portion of the page using hyperlinks.

The steps for integrating ACS7 with Siebel Portal applications are:

1. Import Custom ACS7 Objects – Import custom ACS7 objects in Siebel repository.
2. Import ACS7 Scripts – Import custom ACS7 scripts in Siebel repository.
3. Copy web template - ACS7 applets are based on custom ACS7 web templates. In case of Siebel 7.5.x, the custom ACS7 web templates should be copied in <system drive> /sea752/siebsrvr/webtempl. In case of Siebel 7.7, the custom ACS7 web templates should be copied in <system drive> /sea77/siebsrvr/webtempl.

Note: The steps mentioned above are described in Chapter 6: ACS7-Siebel Integration in *Installation and Configuration Manual* for ACS7 3.2a in detail.

4. [Create Applets](#) – Create new ACS7 applets to display, add or search and link FileNet attachments in a portal application.
5. [Add Applets to a view](#) – Add applets to a view in which attachments are to be displayed or added.
6. [Create Link between CIS VBC and Other Business Component](#) – Create a link between CIS VBC and the business component that is being enabled for ACS7.

Note: The steps mentioned below are described in Chapter 6: ACS7-Siebel Integration in *Installation and Configuration Manual* for ACS7 3.2a in detail for Service Request Business Component. The same steps should be carried out for any other Business Component to be configured.

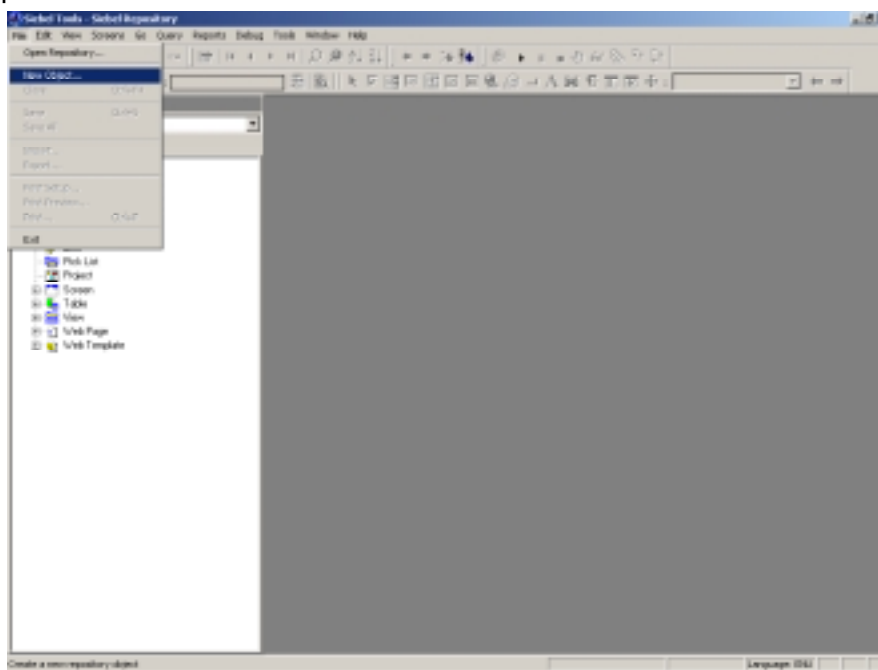
7. Set CIS VBC as Business Object component to any Business Object - CIS VBC should be set as a business object component of a business object, to integrate ACS7 views inside a screen.
8. Compile the repository - Compile the Siebel repository to get the custom objects reflected in the Siebel Application.
9. Generate the Browser Scripts – Generate the browser scripts to create JavaScript files to be used by Siebel Application at run time.

10. Start Siebel services and update Browser scripts – Start the Siebel services and load the scripts into the Siebel Web server extension.
11. Assign responsibility to the users – Assign responsibility to Siebel users so that they can view ACS7 views.
12. Configure Siebel Desktop User credentials – Configure Siebel desktop user credentials that will be used when ACS7 interacts with Siebel application.

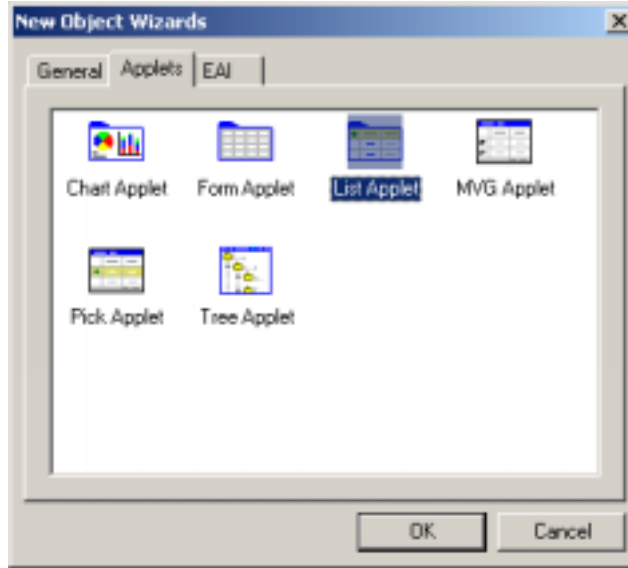
Creating Applets

Siebel Portal (Customer) Applications requires a separate set of applets to integrate with ACS7 3.2a. Steps for creating the applets are given below:

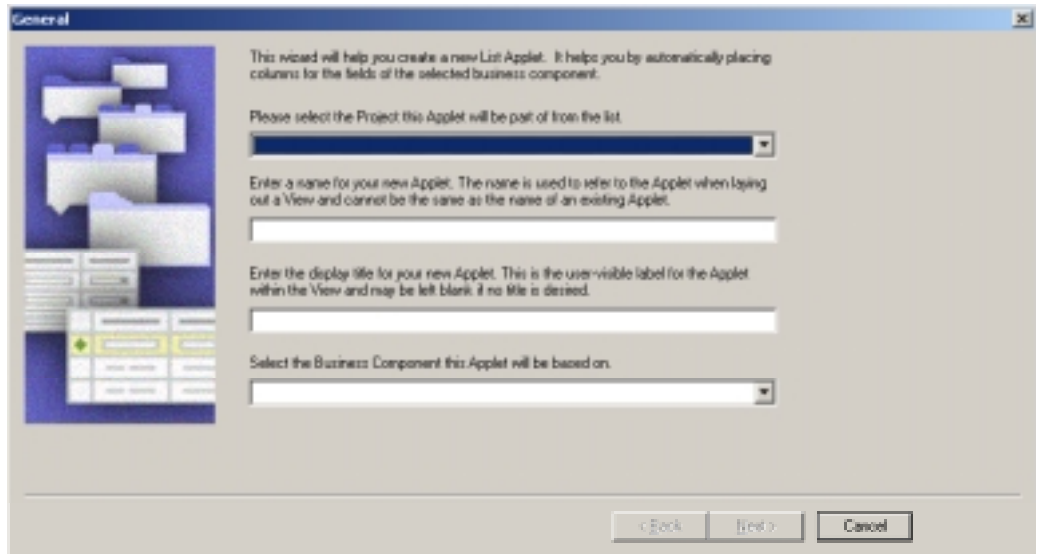
1. Open Siebel Tools



2. Select **File->New Object** from Siebel tools menu. The following screen is displayed:



3. Select **List Applet** from **Applets** tab and click **OK** button. Applet wizard is displayed:



- a. Select the project as **CIS 3.0 Project** and business component as **CIS VBC**. Enter the following values in name and title of the applet:

For View Linked Documents applet:

Name : **ViewLinkedDocuments(eService)**

Title : **View Linked Documents**

For Add Documents applet:

Name : **AddDocuments(eService)**

Title : **Add Documents**

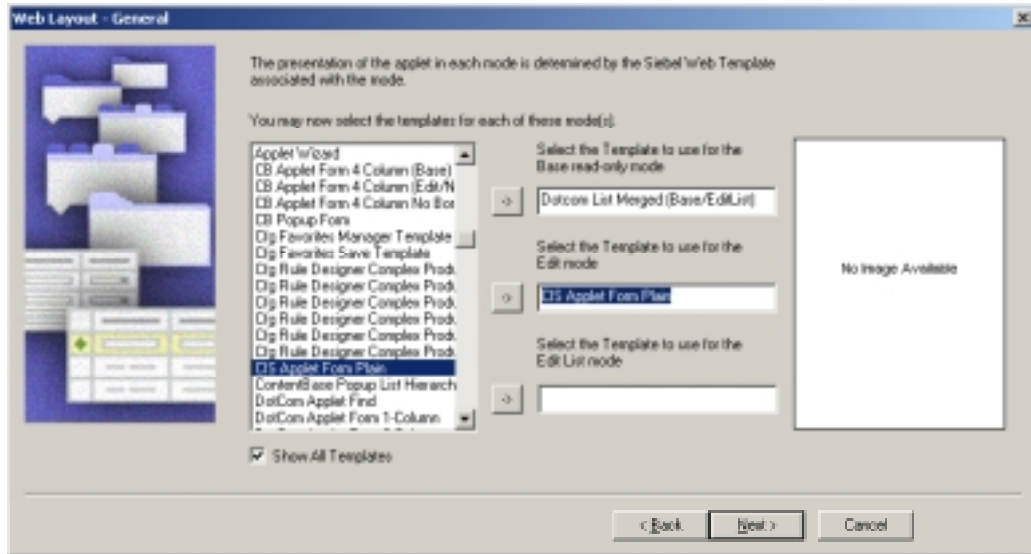
For Search And Link Documents applet:

Name : **SearchandLinkDocuments(eService)**
Title : **Search And Link Documents**

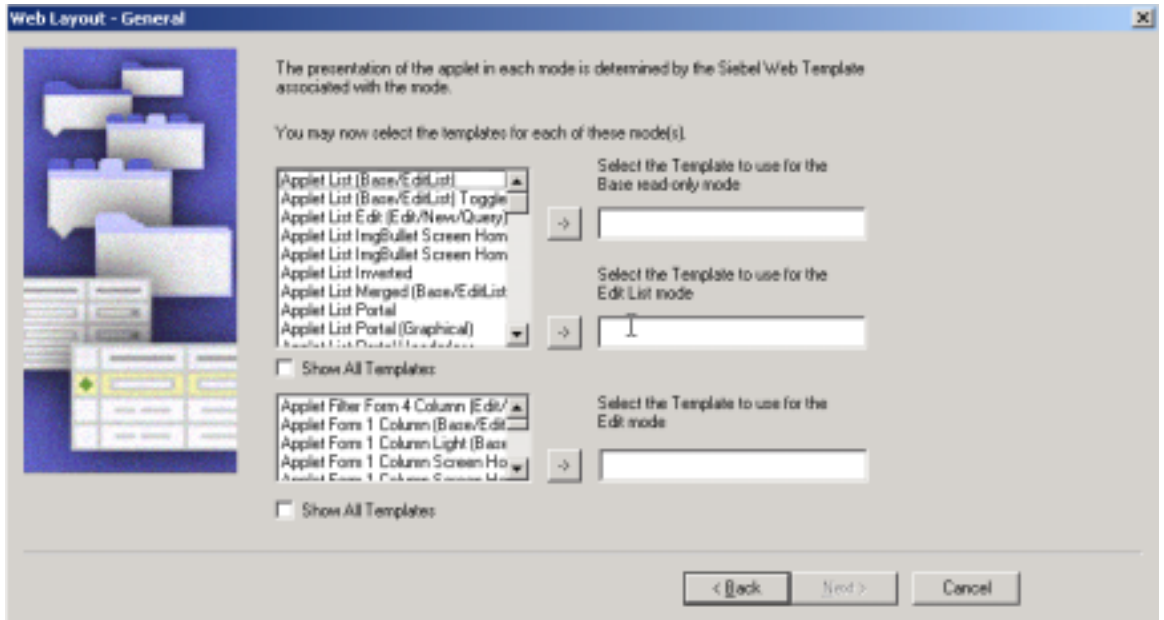


4. Click **Next**.

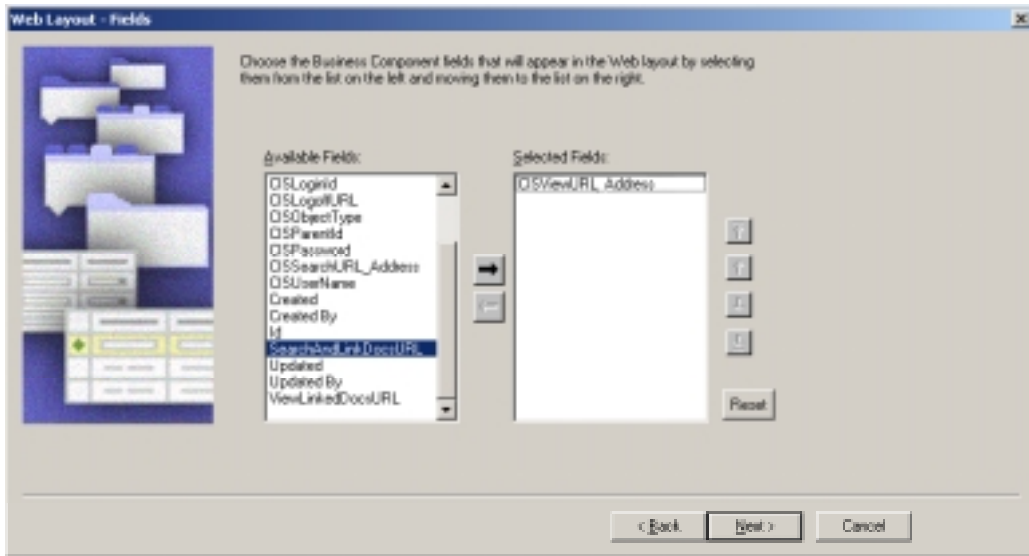
In case of Siebel 7.5.x, following screen is displayed.



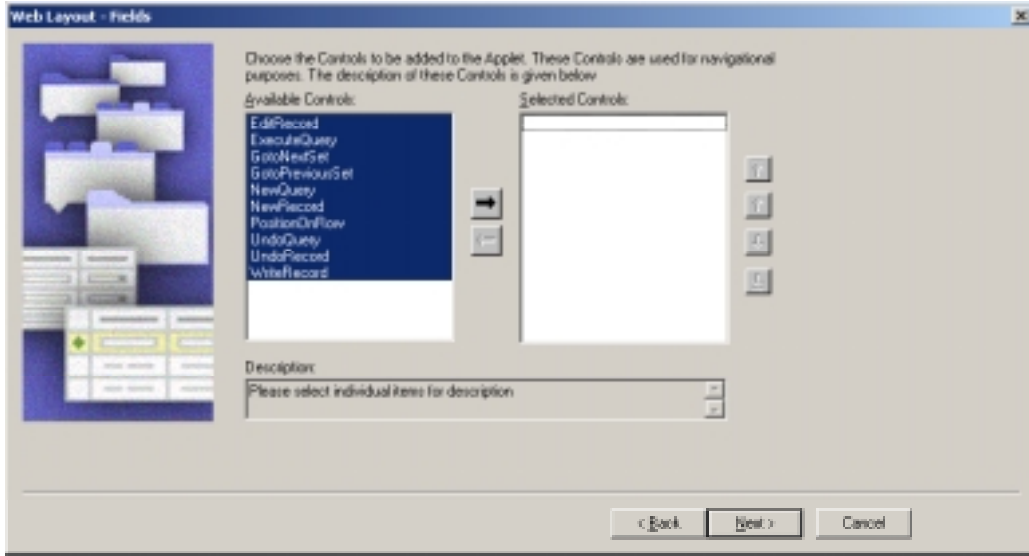
In case of Siebel 7.7, following screen is displayed.



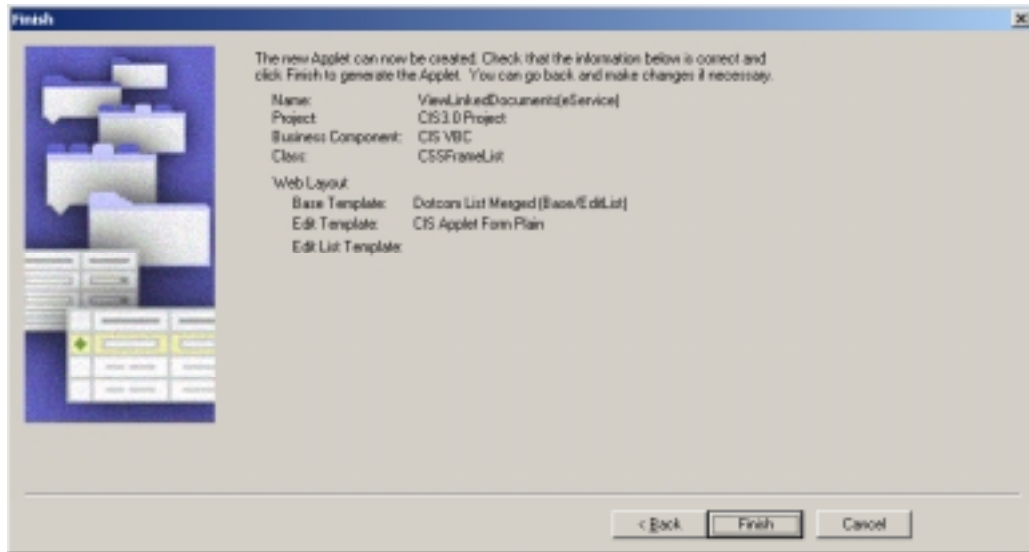
5. Click on **Show All Templates** checkbox. Select **Dotcom List Merged (Base/EditList)** template to use as Base read-only mode template, **CIS Applet Form Plain** template to use as Edit mode template.
6. Click **Next**. The following screen is displayed.



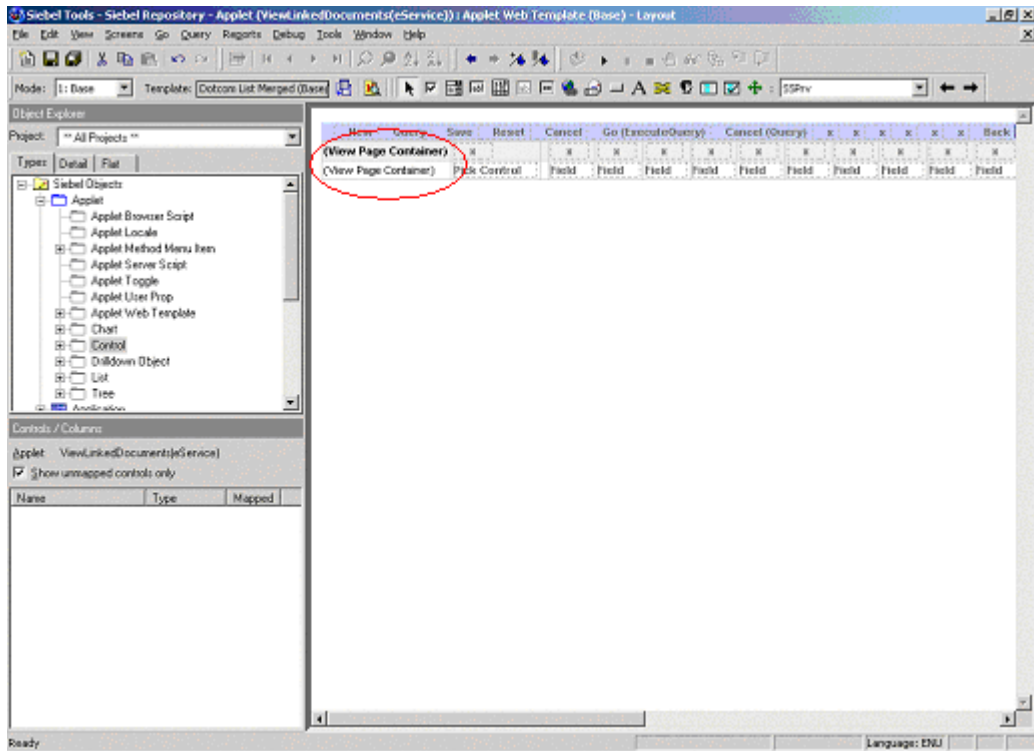
7. Select appropriate field from **Available Fields** list box. (**CISViewURL_Address** for View Linked Documents applet, **CISAddURL_Address** for Add Documents applet and **CISSearchURL_Address** for Search and Link Documents applet).
8. Click **Next**. The following screen is displayed.



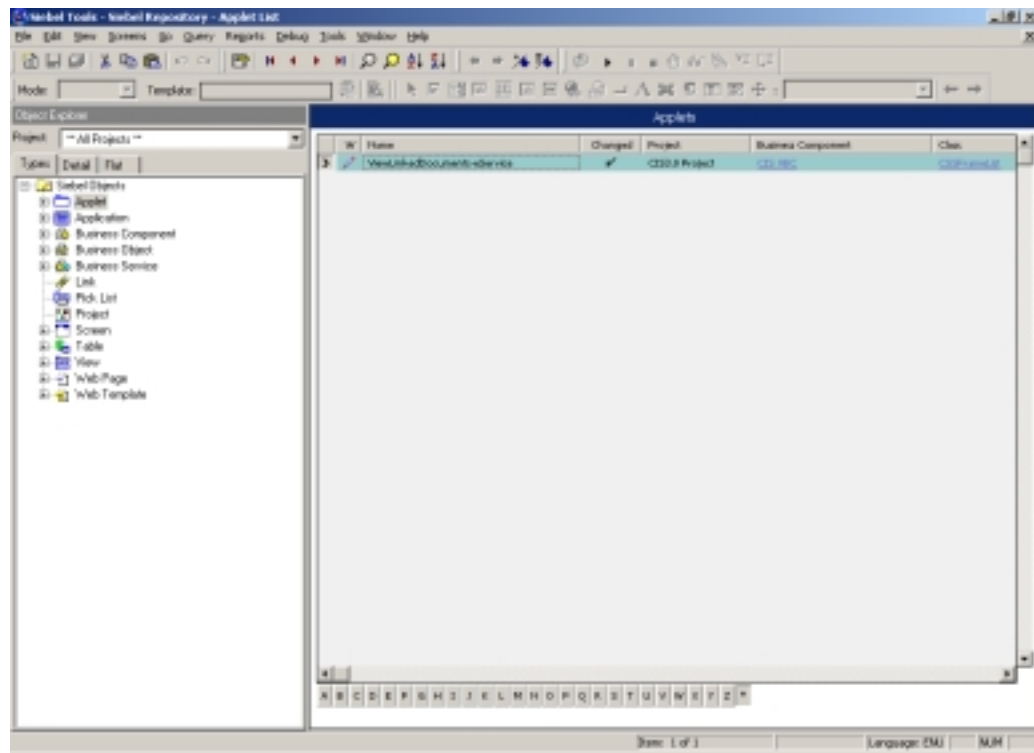
9. Remove all the controls from **Selected Controls** list box and click **Next**.



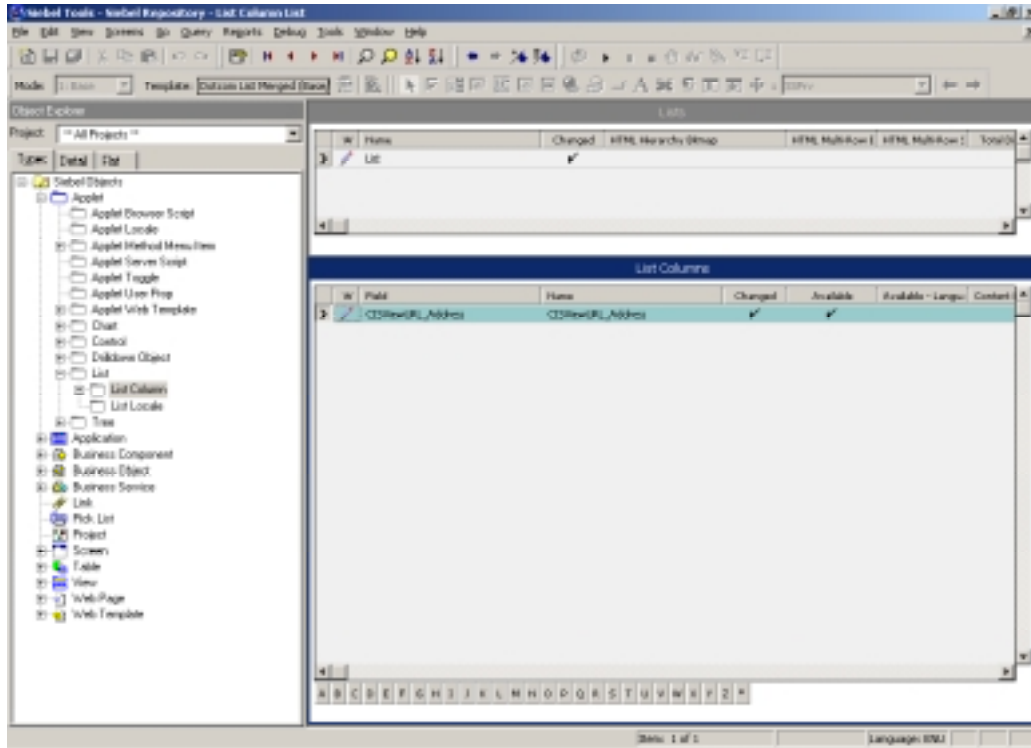
10. Check the information entered in previous screens and click **Finish**.
11. **Edit Web Layout** window for applet is opened by default.



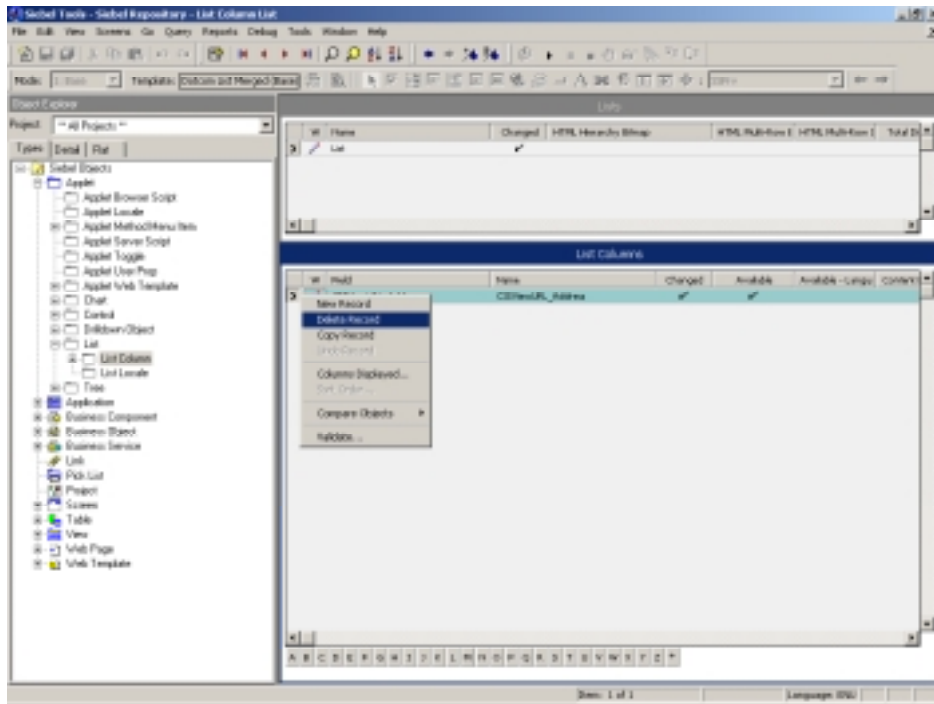
12. Remove existing controls and/or columns from the list.
13. Close **Edit Web Layout** window after saving the changes. Applet created in the previous steps is listed on the right side pane.



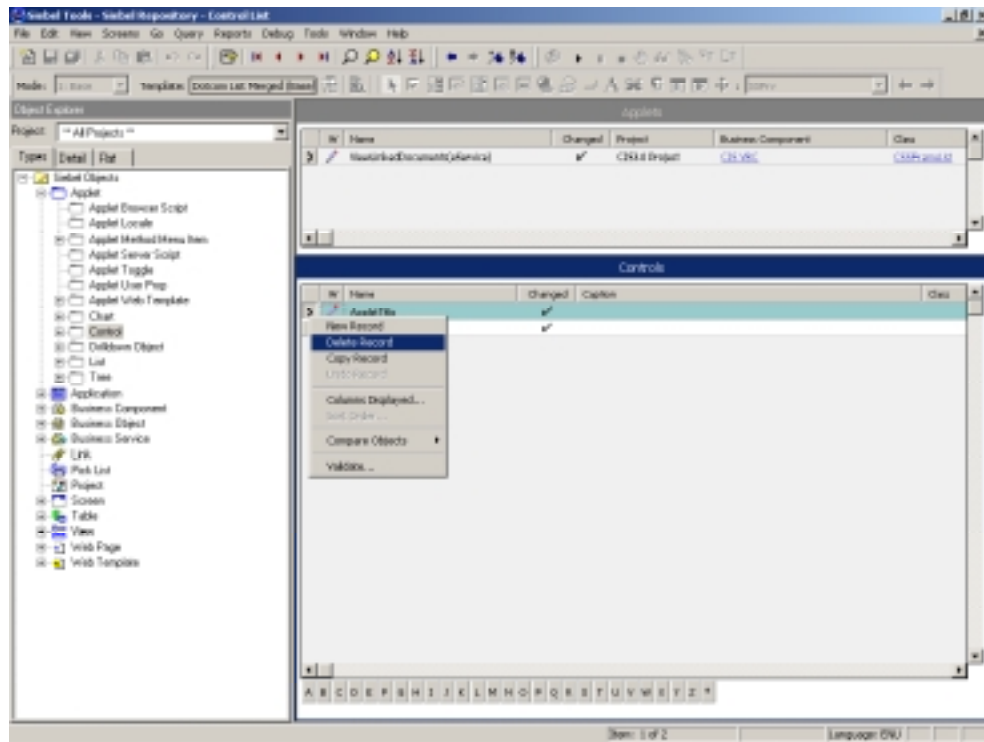
14. Expand **List** under **Applet**. Select **List Columns** under **List** in Object explorer.



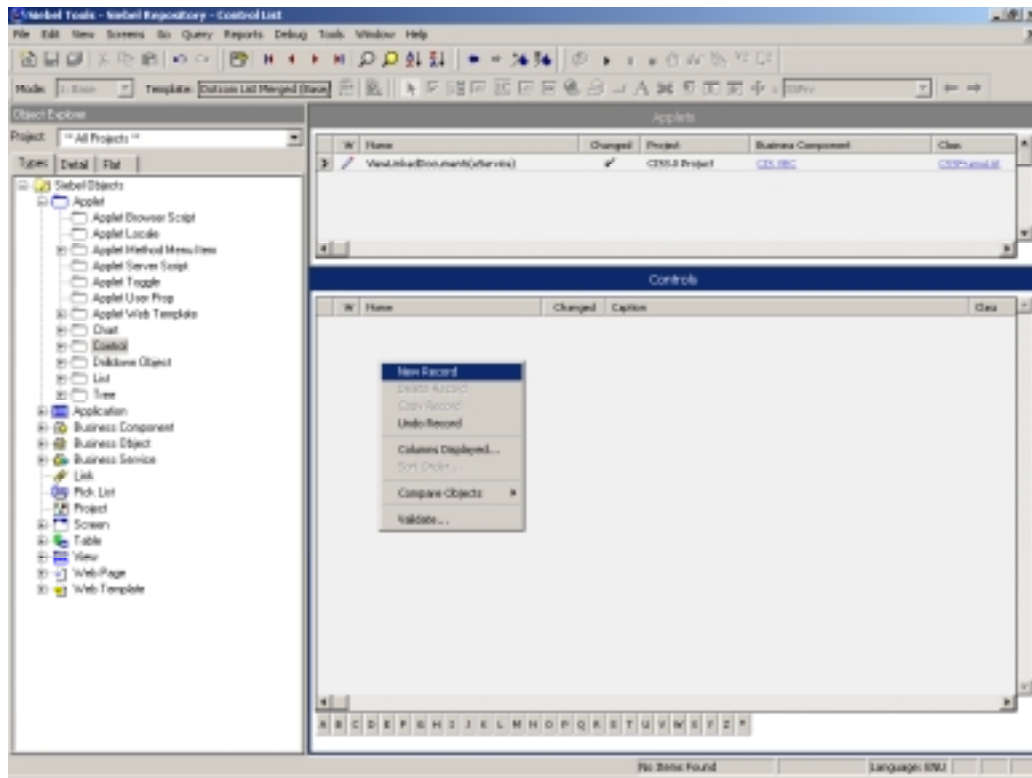
15. Right click on the record in **List Column** window and select **Delete Record**.



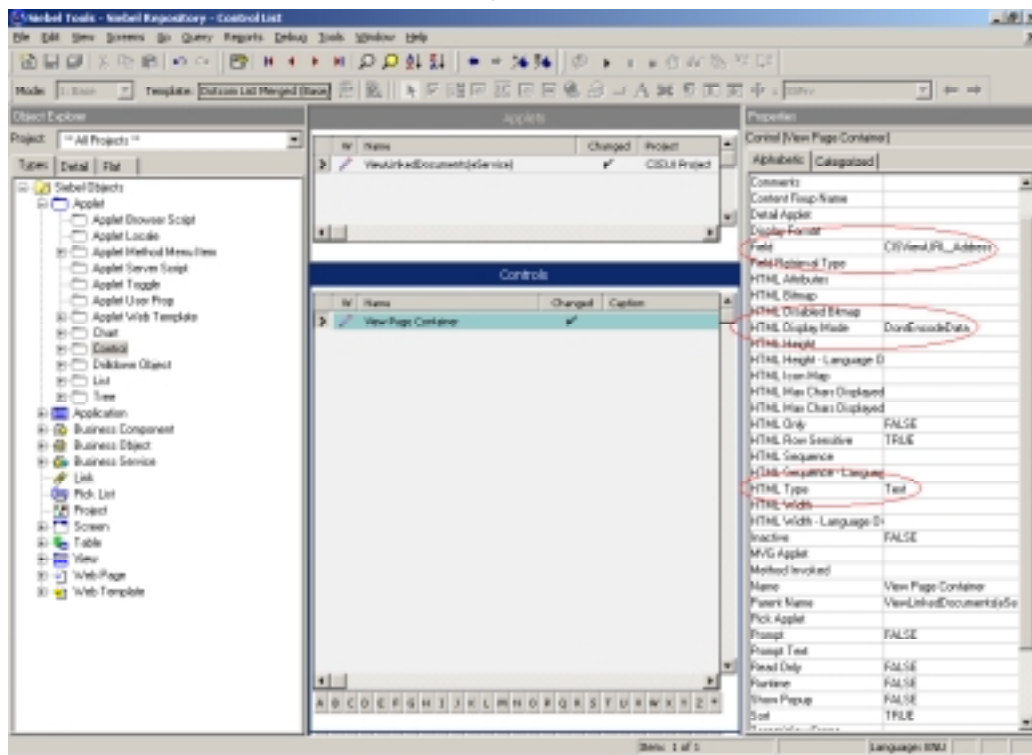
16. Click **Yes** on confirmation box.
17. Select **Controls** under **Applet** in Object Explorer. Right click on the records present in **Controls** window.



18. Select **Delete Record** menu option.
19. Right click on the **Controls** window.



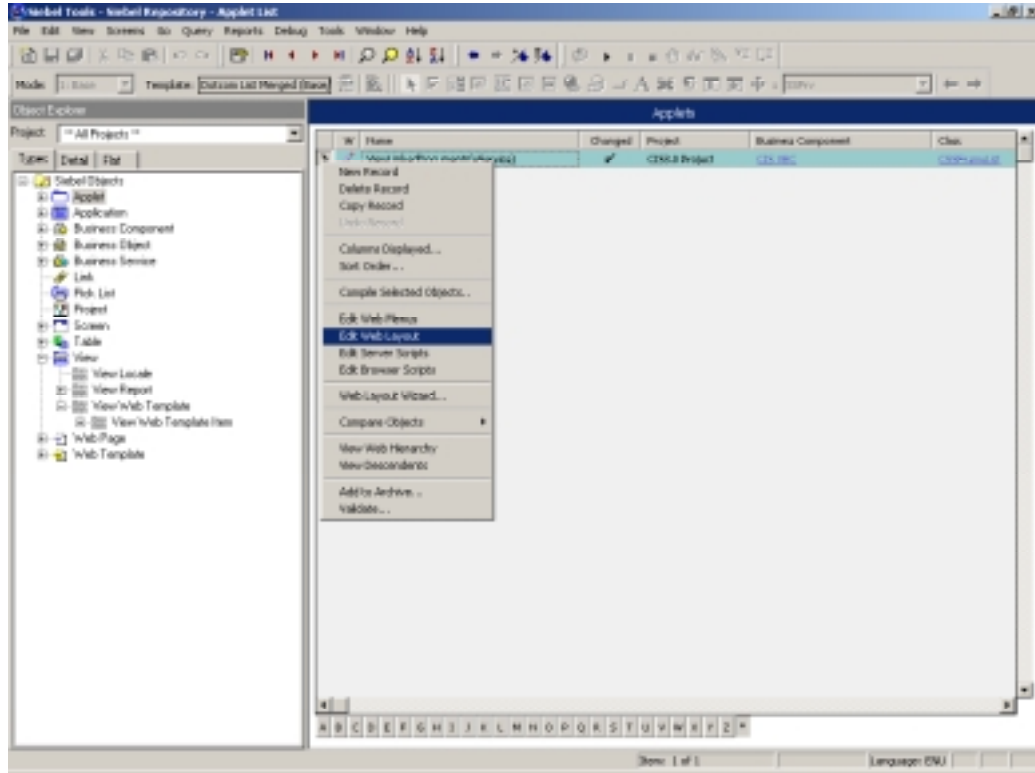
20. Select **New Record** menu option.



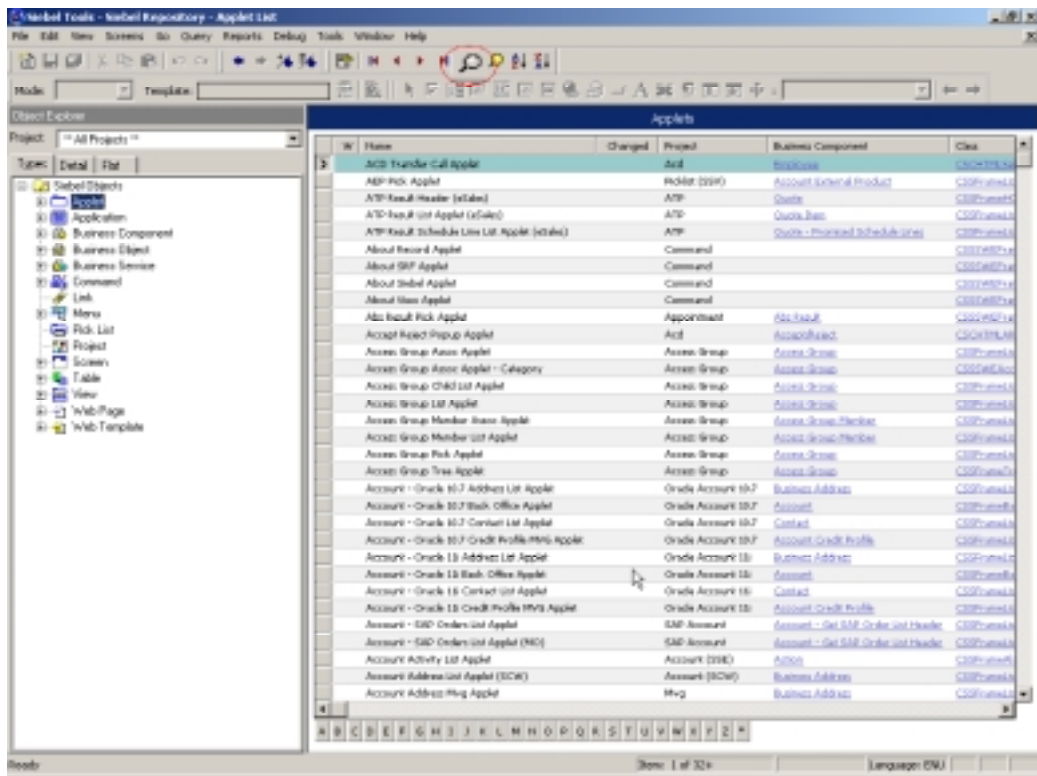
21. Enter name for the control, select appropriate field in **Field** property (**CISViewURL_Address** for view linked documents applet, **CISAddURL_Address** for Add documents applet and

CISSearchURL_Address for Search and link documents applet). Set **HTML Display Mode** property as **DontEncodeData** and **HTML Type** property as **Text**.

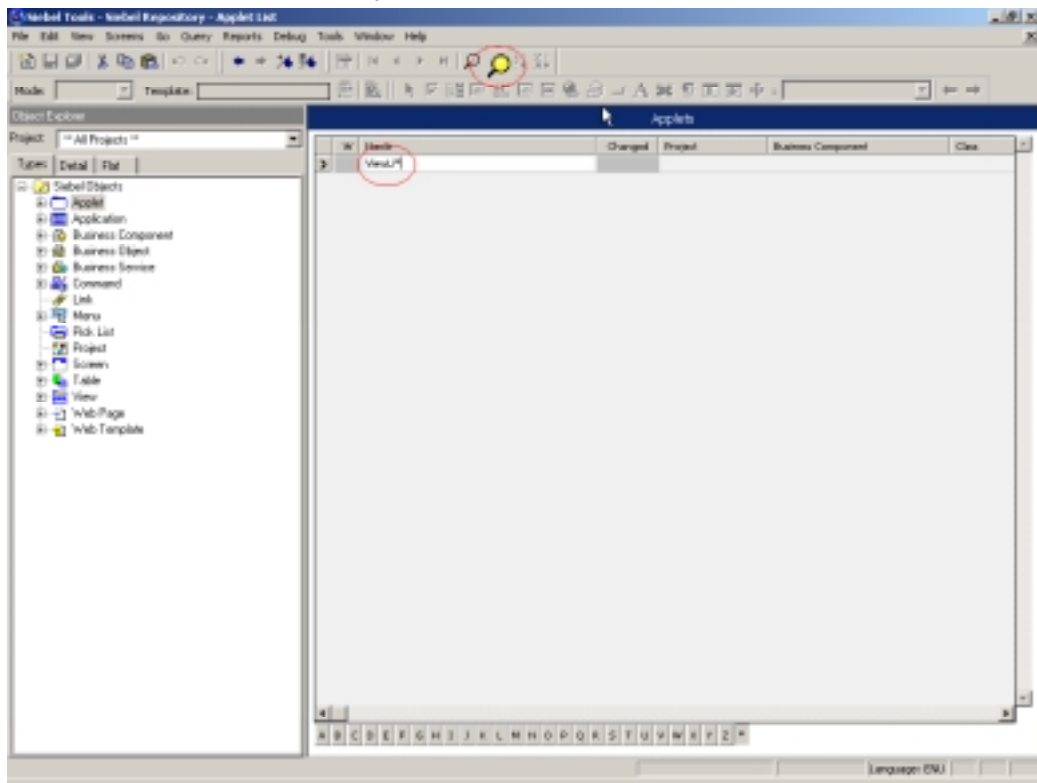
In case of Siebel 7.7, enter “Caption – String Reference” property for control (**X_VIEW_LINKED_DOCUMENTS** for view linked documents applet, **X_ADD_DOCUMENTS** for Add documents applet and **X_QUERY_AND_LINK_DOCUMENTS** for Search and link documents applet



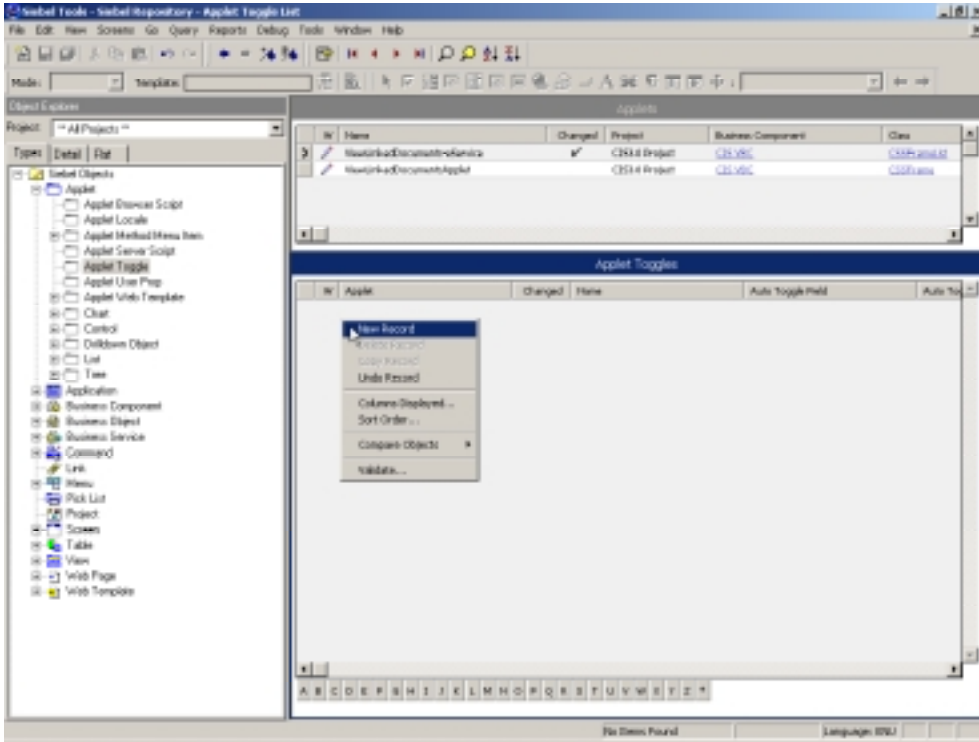
22. Right click on the applet record and select **Edit Web Layout**.
23. Add control created in [steps 19-21](#) at the first column in the list.
24. Save the changes.
25. Create other applets by following [steps 2-24](#).
26. Select **Applet** from Object Explorer.



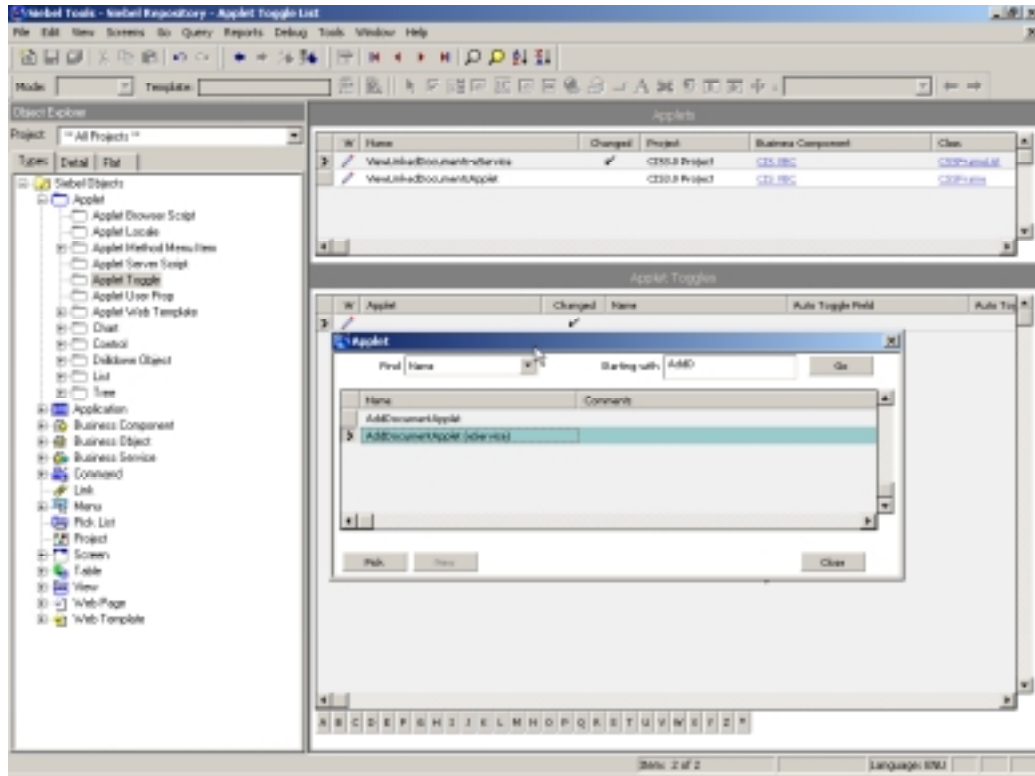
27. Click on **New Query** icon on the toolbar.



28. Provide query criteria to search the **ViewLinkedDocuments(eService)** applet. Click **Execute Query** icon on the toolbar.
29. Expand **Applet** in object explorer. Select **Applet Toggle** under **Applet**.



30. Right click on the **Applet Toggle** window and select **New Record** menu option.

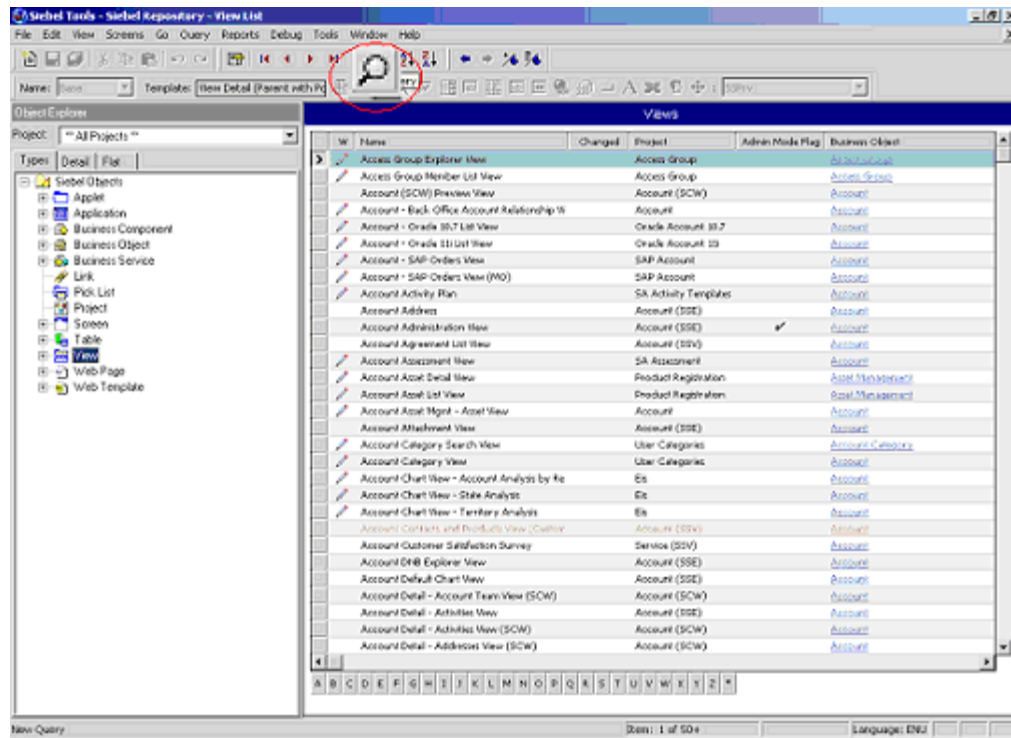


31. Select the **AddDocumentsApplet(eService)** in **Applet** field.
32. Enter **1** for **Sequence** field and save the changes.
33. Repeat [steps 30-32](#) to add **SearchandLinkDocumentsApplet(eService)** as Toggle Applet. Select the **SearchandLinkDocumentsApplet(eService)** in **Applet** field and **2** in **Sequence** field.

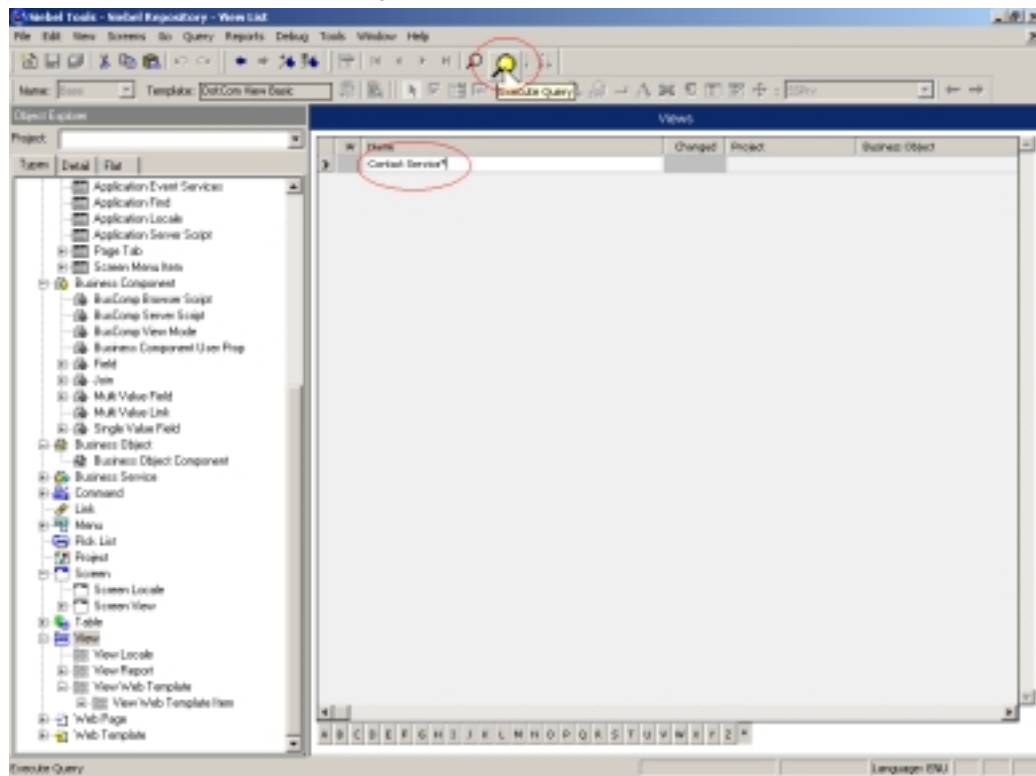
Adding Applets to a view

To display Applets in eService application, applets need to be added to a view. Following are the steps to associate applets with a view:

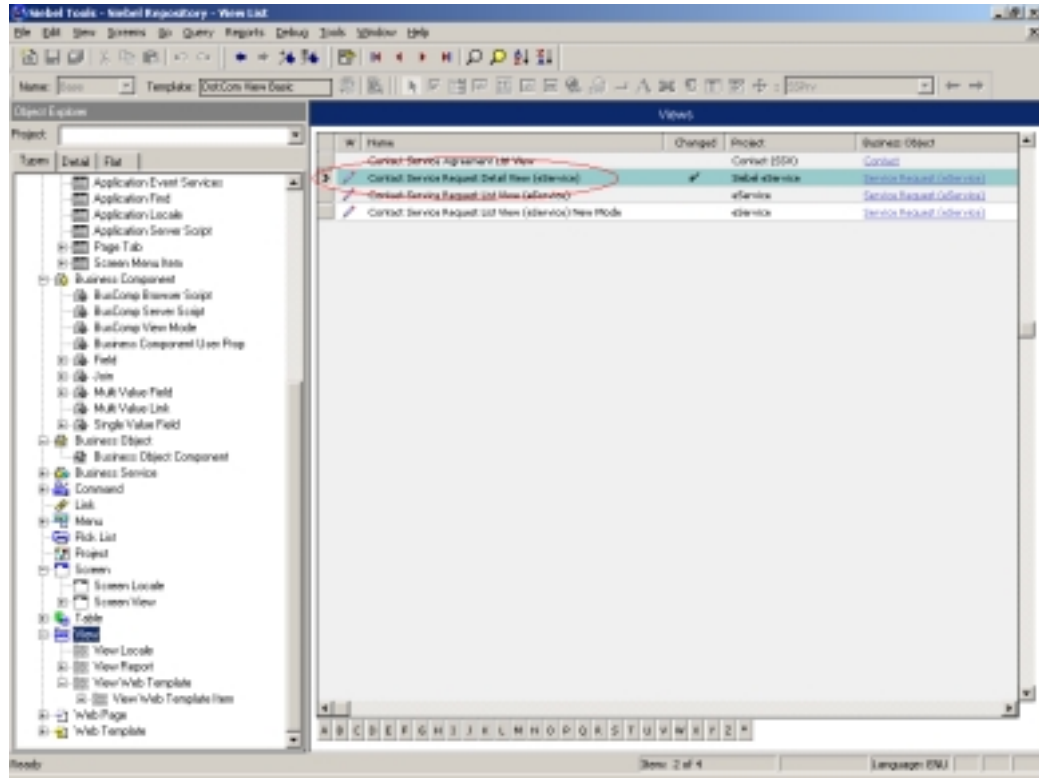
1. Select **View** in Object Explorer.



2. Click on **New Query** icon on the toolbar.



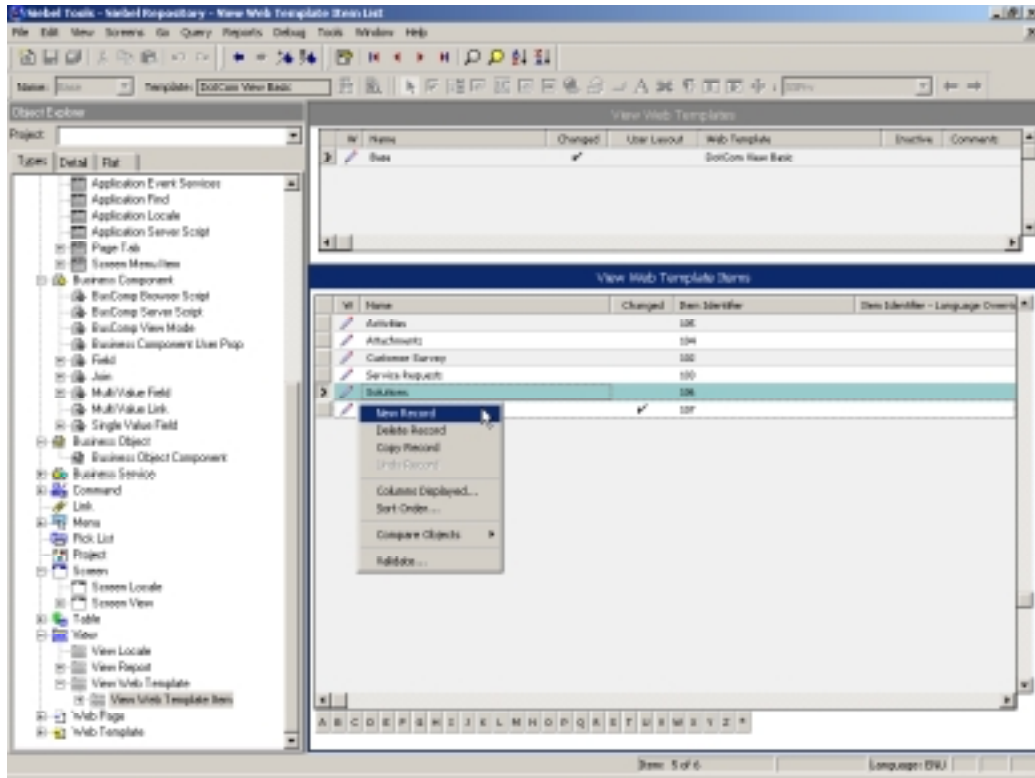
3. Write **Contact Service*** in **Name** column and click **Execute Query** icon on the toolbar.



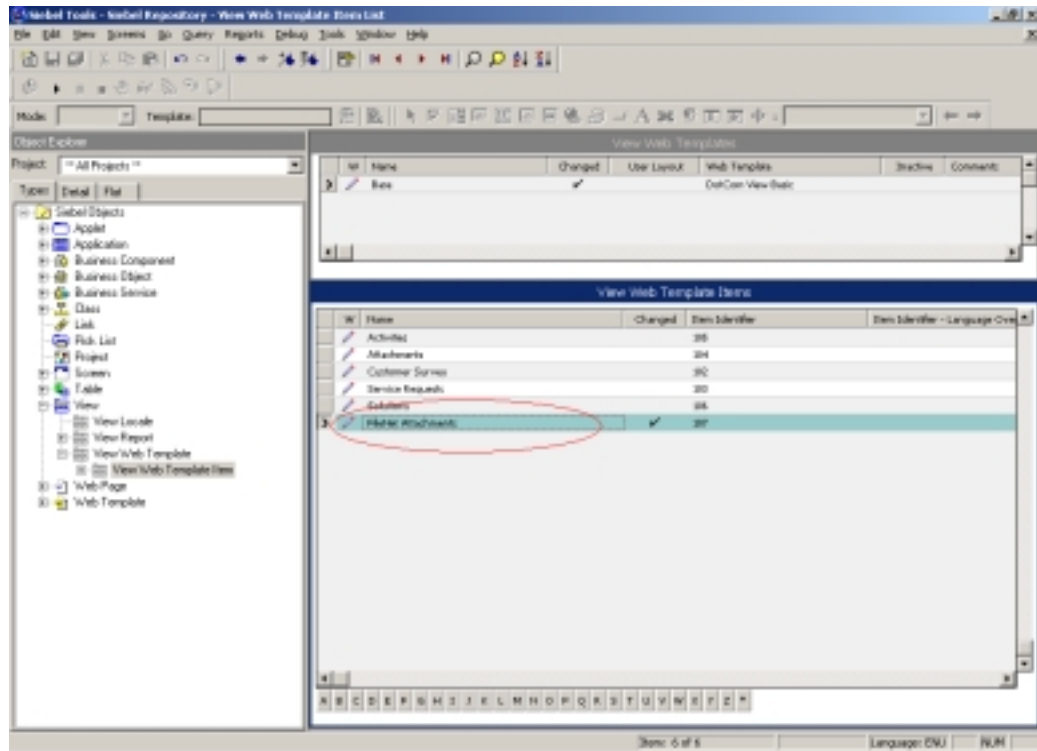
4. Select **Contact Service Request Detail View (eService)** from **Views** window in right hand side pane.

Note: Name of the view to which applets are to be added may be different for applications other than eService. Siebel administrator needs to determine appropriate view name and use that to query in step 3 & 4.

5. Expand **View** in object explorer and select **View Web Template** under **View**.
6. Expand **View Web Template** in object explorer and select **View Web Template Items** under **View Web Template**.



7. Right click on right hand side pane and select **New Record** menu option.
8. Enter **FileNet Attachments, 107** and **ViewLinkedDocuments(eService)** in **Name, Sequence** and **Applet** fields respectively.



Creating Link between CIS VBC and Other Business Component

To synchronize CIS VBC and other business components, a link needs to be created between CIS VBC and other business components using the following steps:

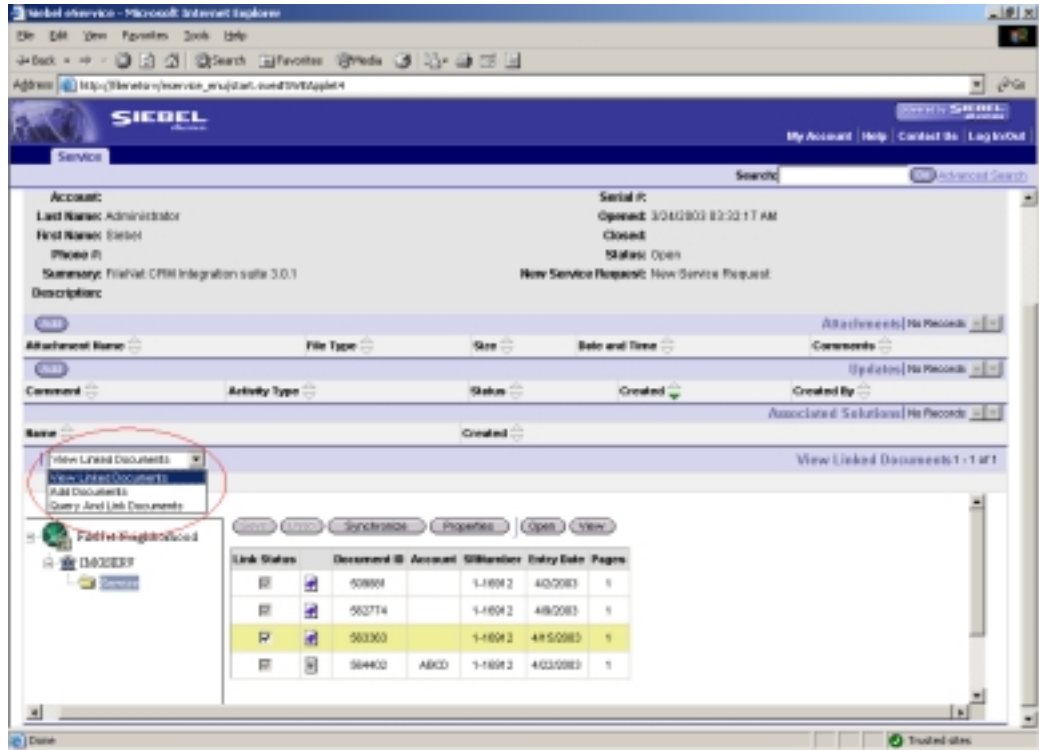
1. Select **Link** in Object Explorer and right click in **Object List Explorer** in right hand side pane.

Name, Project, Parent Business Component, Child Business Component, Source Field and Destination Field properties respectively of Link object.

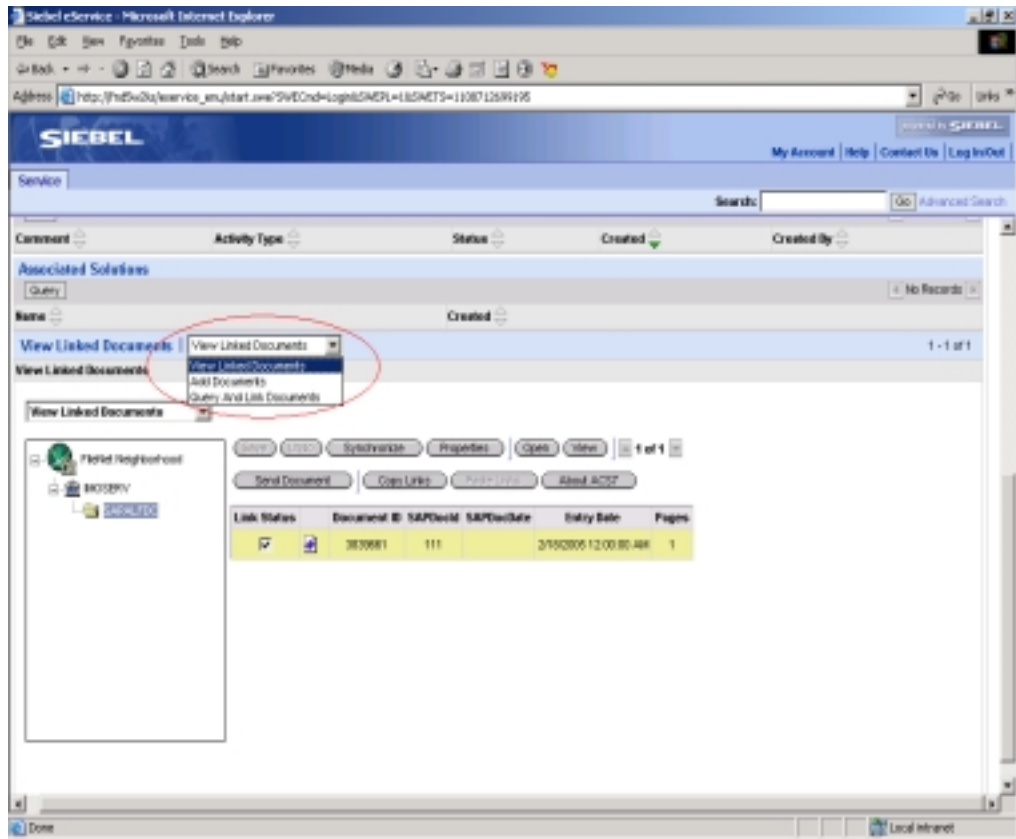
4. Save the changes and close the **Link** window.

After completing all the integration steps (including the steps given in Chapter 6: ACS7-Siebel Integration in *Installation and Configuration Manual*) the screen would appear as:

For Siebel 7.5.x,



For Siebel 7.7,



2

Limitations

There are some limitations in ACS7 integration with Siebel Portal Application. These limitations are stated below:

- ACS7 3.2a has a feature of logging off from all the FileNet libraries when a user logs out from Siebel application. In case of Portal applications this feature will not be available.

As a workaround, set session time out to the minimum in ACS7 configuration as ACS7 logs off from FileNet libraries when the session is timed out.

- Siebel Customer/Portal applications run in Standard Interactivity Mode only. To maintain look and feel of Siebel application ACS7 administrator should set ACS7 application mode to Standard Interactivity Mode (SIM) in ACS7 configuration if running with Portal application.

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