Oracle Siebel CRM 8
Developer's Handbook

A practical guide to configuring, automating, and extending Siebel CRM applications

Alexander Hansal
# Table of Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preface</td>
<td>1</td>
</tr>
<tr>
<td><strong>Chapter 1: Siebel Tools and the Siebel Repository</strong></td>
<td>7</td>
</tr>
<tr>
<td>Siebel Tools user interface</td>
<td>8</td>
</tr>
<tr>
<td>- Title bar</td>
<td>9</td>
</tr>
<tr>
<td>- Menu bar</td>
<td>10</td>
</tr>
<tr>
<td>- Toolbar</td>
<td>11</td>
</tr>
<tr>
<td>- Docking windows</td>
<td>12</td>
</tr>
<tr>
<td>- Editors</td>
<td>14</td>
</tr>
<tr>
<td>- Status bar</td>
<td>15</td>
</tr>
<tr>
<td>Navigating in Siebel Tools</td>
<td>15</td>
</tr>
<tr>
<td>Siebel Repository metadata</td>
<td>15</td>
</tr>
<tr>
<td>- The data layer</td>
<td>17</td>
</tr>
<tr>
<td>- Tables and columns</td>
<td>17</td>
</tr>
<tr>
<td>- Interface tables</td>
<td>18</td>
</tr>
<tr>
<td>- Indexes</td>
<td>18</td>
</tr>
<tr>
<td>- Object type relationships in the Siebel data layer</td>
<td>18</td>
</tr>
<tr>
<td>- The business layer</td>
<td>19</td>
</tr>
<tr>
<td>- Business components, joins, and fields</td>
<td>19</td>
</tr>
<tr>
<td>- Links</td>
<td>21</td>
</tr>
<tr>
<td>- Business objects</td>
<td>22</td>
</tr>
<tr>
<td>- Relationships of business layer and data layer objects</td>
<td>22</td>
</tr>
<tr>
<td>- The presentation layer</td>
<td>23</td>
</tr>
<tr>
<td>- Applets and controls</td>
<td>24</td>
</tr>
<tr>
<td>- Views</td>
<td>24</td>
</tr>
<tr>
<td>- Screens</td>
<td>25</td>
</tr>
<tr>
<td>- Applications</td>
<td>25</td>
</tr>
<tr>
<td>- Menus and toolbars</td>
<td>26</td>
</tr>
<tr>
<td>- Relationships of presentation layer and business layer objects</td>
<td>26</td>
</tr>
<tr>
<td>- The integration layer</td>
<td>27</td>
</tr>
<tr>
<td>- Internal integration objects</td>
<td>27</td>
</tr>
<tr>
<td>- External integration objects</td>
<td>29</td>
</tr>
</tbody>
</table>
# Table of Contents

The automation layer 29  
Business services 29  
Workflow processes 30  
Tasks 31  
Commands 31  
The logical architecture of Siebel applications 32  
Other object types 33  
**Summary** 34

## Chapter 2: Developer Tasks 35

Initialize the local database 36  
Establishing network connectivity 37  
Verifying settings in the client configuration files 37  
Downloading and initializing the local database 38  
Getting object definitions from the server database 39  
Projects and objects 40  
Siebel Tools Options 41  
The development process 42  
Checking out 43  
Creating or modifying object definitions 45  
New Object Wizards 46  
Creating new records 47  
Copying existing object definitions 47  
Creating a new version of existing object definitions 47  
Modification techniques 47  
Validating object definitions 48  
Compiling object definitions 49  
Testing and debugging 49  
Checking in 51  
Local locking and prototyping 53  
Archiving object definitions 53  
Importing archived object definitions 54  
Comparing object definitions 54  
Searching the Siebel Repository 55  
Integrating external source control systems 55  
Automating developer tasks using command line options 56  
Keeping the upgrade in mind 57  
Summary 59

## Chapter 3: Case Study Introduction 61

Background of All Hardware (AHA) 61  
Description of AHA's business processes 62  
Sales—Update Customer 62  
Sales—Retail Order 63
### Table of Contents

**Marketing—Campaign Tracking** 64

**Requirements for AHA** 65
  - Sales—Update Customer 67
  - Sales—Retail Order 68

**Summary** 68

**Chapter 4: Symbolic Strings** 69

**Understanding symbolic strings** 69

**Creating and using symbolic strings** 72
  - Creating symbolic strings manually 72
  - Associating symbolic strings with objects 73
  - Using batch scripts to create symbolic strings automatically 74
    - Using strconv.bat to generate symbolic strings 75
    - Using strcons.bat to consolidate duplicate symbolic strings 77

**Using message categories** 78

**Localizing Siebel applications** 80

**Summary** 81

**Chapter 5: Creating and Configuring Applets** 83

**Understanding applets and web templates** 83
  - Applet web templates 84
  - Applet web template types 86

**Creating and modifying form applets** 87
  - Case study example: Creating a form applet 87
    - Copying an existing applet 90
    - Changing caption text using symbolic strings 90
    - Changing the association to a business component field 91
    - Deleting existing controls 92
    - Moving an existing control to a different location 92
    - Creating new controls 92
    - Creating new form sections 93
    - Formatting and aligning multiple controls 93
    - Setting the tab order 94
    - Copying controls from other applets using the compare objects window 94
    - Adding a show more/show less button 95
    - Setting controls to only appear in "more" mode 96
    - Adding standard buttons 96
    - Displaying data in the applet title 96
    - Setting applet properties for data operations 96
    - Compiling the new applet 97

**Creating and modifying list applets** 98
  - Case study example: Creating a list applet 99
    - Creating a new list applet using the Siebel Tools new object wizard 99
    - Editing the base layout template 101
    - Editing the query layout template 102
### Table of Contents

**Other applet types**  
- Configuring chart applets 103  
- Configuring tree applets 106  
- Configuring pick applets 107  
- Configuring multi-value-group (MVG) and associate applets 108

**Summary**  
109

**Chapter 6: Views and Screens**  
111

**Understanding views and screens**  
- Understanding views 112  
- Understanding screens 114  
- View web templates 116

**Creating and modifying views**  
- Case study example: Creating a new view 117  
- Creating a view using the new view wizard 118  
- Modifying a view in the view web layout editor 119  
- Adding applets to a view in the view web layout editor 119  
- Setting the applet mode property 120  
- Setting the thread bar properties of a view 120

**Adding a view to a screen**  
121

**Registering a new view**  
- Testing a new view 123

**Summary**  
124

**Chapter 7: Business Components and Fields**  
125

**Understanding business components**  
- Visualizing business component definitions 128  
- Business components and SQL 128

**Creating joins and fields**  
- Case study example: Displaying data from joined tables 130  
- Case study example: Creating a join 131  
- Case study example: Creating single value fields 131  
- Case study example: Creating calculated fields 132  
- Case study example: Exposing a new field in an applet 135

**Controlling field level behavior**  
- Case study example: Field properties 138  
- Creating translatable validation messages 138  
- Implementing field validation 139  
- Case study example: Creating a required field 140

**The Siebel Query Language**  
141

**Syntax for pre and post-default values**  
145

**Using the Siebel Query Language**  
146

**Controlling business component behavior**  
147
<table>
<thead>
<tr>
<th>Table of Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chapter 8: The Data Layer</td>
</tr>
<tr>
<td>Understanding tables, columns, and indexes</td>
</tr>
<tr>
<td>Understanding table types</td>
</tr>
<tr>
<td>Understanding columns</td>
</tr>
<tr>
<td>System columns</td>
</tr>
<tr>
<td>Understanding indexes</td>
</tr>
<tr>
<td>Understanding user keys</td>
</tr>
<tr>
<td>Creating table reports</td>
</tr>
<tr>
<td>Considerations for custom schema changes</td>
</tr>
<tr>
<td>Using preconfigured extension tables</td>
</tr>
<tr>
<td>Using 1:1 extension tables</td>
</tr>
<tr>
<td>Case study example: Creating a new field based on an existing 1:1 extension table column</td>
</tr>
<tr>
<td>Using 1:M extension tables</td>
</tr>
<tr>
<td>Creating custom columns</td>
</tr>
<tr>
<td>Creating custom indexes</td>
</tr>
<tr>
<td>Creating custom tables</td>
</tr>
<tr>
<td>Case study example: Creating a custom standalone table</td>
</tr>
<tr>
<td>Applying schema changes to local and server databases</td>
</tr>
<tr>
<td>Using the Siebel Tools &quot;Apply&quot; feature</td>
</tr>
<tr>
<td>Verifying the application of local database changes</td>
</tr>
<tr>
<td>Using the synchronize schema definition process</td>
</tr>
<tr>
<td>Summary</td>
</tr>
<tr>
<td>Chapter 9: Business Objects and Links</td>
</tr>
<tr>
<td>Understanding business objects and links</td>
</tr>
<tr>
<td>Link object definitions</td>
</tr>
<tr>
<td>Creating a child business component on a 1:M extension table</td>
</tr>
<tr>
<td>Case study example: Creating a custom child business component</td>
</tr>
<tr>
<td>Case study example: Creating child business components on a standalone table</td>
</tr>
<tr>
<td>Case study example: Creating links</td>
</tr>
<tr>
<td>Case study example: Configuring business objects</td>
</tr>
<tr>
<td>Summary</td>
</tr>
<tr>
<td>Chapter 10: Pick Lists</td>
</tr>
<tr>
<td>Understanding pick lists</td>
</tr>
<tr>
<td>Static pick lists</td>
</tr>
<tr>
<td>The pick list object type</td>
</tr>
<tr>
<td>Pick maps</td>
</tr>
</tbody>
</table>
## Table of Contents

### Dynamic pick lists
- Repository object types for pick lists 199

### Case study example: Creating a new static pick list for an existing field
- Verifying object definitions created by the pick list wizard 202

### Administering the list of values table 203

### Case study example: Creating dynamic pick lists 206

### Case study example: Reusing existing pick lists 207

### Case study example: Creating pick applets 208

### Case study example: Testing pick list configurations 210

#### Constrained and hierarchical pick lists 211
- Exploring a constrained dynamic pick list 212
- Exploring hierarchical static pick lists 213

#### Summary 214

### Chapter 11: Multi Value Fields 215

#### Understanding multi value fields 215
- The "Primary" concept 218

#### Repository object types behind multi value fields 218
- Multi value link 219
- Multi value field 220
- Multi value group (MVG) and association list applets 220
- Relationships between repository objects for multi value fields 220

#### Case study example: Creating multi value fields 222
- Creating a new intersection table 222
- Creating a new M:M link 223

#### Creating multi value fields using the MVG wizard 224

#### Case study example: Creating multi value group (MVG) and association list applets 226
- Creating association list applets 229
- Creating MVG controls 229

#### Summary 230

### Chapter 12: Configuring Access Control 231

#### Understanding Siebel access control 231
- View properties for access control 233
- Business component view modes 234
- Repository object definitions for access control 236

#### Configuring view properties for Siebel access control 237
- Case study example 237
- Registering the new view 238

#### Defining business component view modes 238
- Testing the access control configuration 239

---

[ vi ]
<table>
<thead>
<tr>
<th>Chapter 13: User Properties</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Understanding user properties</td>
<td>243</td>
</tr>
<tr>
<td>Multi-instance user properties</td>
<td>246</td>
</tr>
<tr>
<td>Business component and field user properties</td>
<td>246</td>
</tr>
<tr>
<td>Named method user property</td>
<td>249</td>
</tr>
<tr>
<td>Case study example: Using the On Field Update Set user property</td>
<td>253</td>
</tr>
<tr>
<td>Field user properties</td>
<td>255</td>
</tr>
<tr>
<td>Applet, control, and list column user properties</td>
<td>256</td>
</tr>
<tr>
<td>Control user properties</td>
<td>257</td>
</tr>
<tr>
<td>List column user properties</td>
<td>257</td>
</tr>
<tr>
<td>View user properties</td>
<td>257</td>
</tr>
<tr>
<td>Summary</td>
<td>257</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Chapter 14: Configuring Navigation</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Understanding drilldown objects</td>
<td>259</td>
</tr>
<tr>
<td>Creating static drilldowns</td>
<td>262</td>
</tr>
<tr>
<td>Case study example: Static drilldown from list applet</td>
<td>263</td>
</tr>
<tr>
<td>Creating drilldown hyperlinks on form applets</td>
<td>263</td>
</tr>
<tr>
<td>Creating dynamic drilldowns</td>
<td>265</td>
</tr>
<tr>
<td>Case study example: Dynamic drilldown destinations for a list applet</td>
<td>265</td>
</tr>
<tr>
<td>Configuring the thread bar</td>
<td>267</td>
</tr>
<tr>
<td>Case study example: Configuring the thread bar</td>
<td>268</td>
</tr>
<tr>
<td>Configuring toggle applets</td>
<td>268</td>
</tr>
<tr>
<td>Manual applet toggle</td>
<td>268</td>
</tr>
<tr>
<td>Dynamic applet toggle</td>
<td>270</td>
</tr>
<tr>
<td>Summary</td>
<td>271</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Chapter 15: Customizing the Look and Feel of Siebel Applications</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Understanding Siebel web templates</td>
<td>273</td>
</tr>
<tr>
<td>Web template definitions</td>
<td>276</td>
</tr>
<tr>
<td>Considerations for customizing the look and feel of Siebel applications</td>
<td>277</td>
</tr>
<tr>
<td>Using an external text editor for web template customization</td>
<td>278</td>
</tr>
<tr>
<td>Customizing pre-built web templates</td>
<td>279</td>
</tr>
<tr>
<td>Creating custom web templates</td>
<td>282</td>
</tr>
<tr>
<td>Registering a custom web template file</td>
<td>283</td>
</tr>
</tbody>
</table>
# Table of Contents

**Chapter 16: Menus and Buttons**

- Understanding the Siebel event framework
  - Event handling in Siebel applications
  - Controlling method invocation
- **Creating applet buttons**
  - Case study example: Creating a custom applet button that invokes a workflow process
- Configuring command objects
  - Accelerators
  - Case study example: Creating a command with an accelerator
- Case study example: Configuring application menu items
- Case study example: Configuring toolbar buttons
- Case study example: Configuring applet menu items
- Summary

**Chapter 17: Business Services**

- Understanding business services
  - Invoking business service methods
- **Preconfigured business services**
- Testing business services
- Case study example: Invoking a business service method from a runtime event
  - Runtime events
- Summary

**Chapter 18: Supporting Integration Interfaces**

- Understanding integration objects
  - Structure of integration objects
  - Internal and external integration objects
  - Integration component keys
- **Creating internal integration objects**
  - Case study example: Creating an internal integration object
    - Deactivating unneeded integration component fields
- Defining integration component keys
- Testing integration objects
### Advanced settings for integration objects 342
### Summary 343

**Chapter 19: Siebel Workflow** 345

- **Understanding Siebel Workflow** 345
  - Siebel Workflow step types 349
  - Workflow process properties 350
- **Designing and creating workflow processes** 351
  - The workflow process editor 352
  - Case study example: Creating integration objects 354
  - Case study example: Creating a data map 355
  - Case study example: Creating a workflow process with business service steps 358
- **Simulating and testing workflow processes** 363
- **Publishing, activating, and managing workflow processes** 366
  - Case study example: Publishing and activating a workflow process 368
  - Managing workflow processes 369
  - Viewing workflow process instance data 370
- **Invoking workflow processes** 371
  - Case study example: Defining runtime events 372
- **Case study example: Decision steps and Siebel operations** 374
  - Understanding decision point steps 377
  - Understanding Siebel Operation steps 378
  - Case study example: Replacing applets on the AHA Customer Process Start View 380
- **Summary** 381

**Chapter 20: Advanced Siebel Workflow Topics** 383

- **Exception handling in workflow processes** 383
  - Using error exception connectors 384
  - Using stop steps 385
  - Case study example: Creating an error exception with a stop step 385
  - Using error processes 387
- **Subprocesses** 388
- **Loops and iterations** 389
  - Case study example: iterations on a child record set 389
- **Advanced workflow techniques** 394
  - Workflow Utilities 395
  - SIA BC Utility Service 396
  - PRM ANI Utility Service 397
  - EAI XML Write to File 398
  - EAI File Transport 400
### Table of Contents

**Case study example: Using dot notation to access hierarchical data** 400

**Summary** 402

**Chapter 21: Siebel Task User Interface** 403

**Understanding the Siebel Task UI** 403
- Tasks and related repository objects 404

**Case study example: Supporting a business process with Task UI** 407
- Creating task applets and task views 408
  - Preparation steps
    - New business component field: AHA always generate quote flag 409
    - New applet: AHA simple quote form applet 409
    - New applet: AHA simple order form applet 410
    - New transient business component: AHA partner query TBC 411
    - New task applet: AHA partner query task applet 411
    - New task view: AHA partner query task view 413
    - New task view: AHA create account task view 414
    - New task view: AHA create quote task view 415
    - New task view: AHA create order task view 415

- Creating tasks 415
  - Creating the task flow layout
  - Configuring task view steps 417
  - Configuring business service steps 419
  - Configuring Siebel Operation steps 420
  - Configuring decision steps and branches 423

- Creating and using task groups 425

**Publishing, activating, and administering tasks** 426

**Testing and debugging tasks** 427

**Using applet messages** 428

**Summary** 431

**Chapter 22: Extending Siebel CRM Functionality with eScript** 433

**Introduction to Siebel scripting** 434
- Server and browser scripts 435
- Application event handlers 438
- Applet event handlers 438
- Business component event handlers 439
- Business service event handlers 440
- The script editor 440
- The script debugger 443
- The script performance profiler 443
- The Siebel eScript language 443
  - Variable declaration and initialization 445
  - Comments 446
  - Blocks and functions 446
### Table of Contents

- Continuing or canceling the flow of operation 480
- Testing and debugging browser scripts 480
- Extracting browser scripts using the genbscript utility 481

**Using translatable messages** 482
- Invoking business service methods from server and browser script 484

**Tracing** 487
- Considerations for script tracing 488

**Performance profiling** 488

**Summary** 490

**Chapter 24: Deploying Configuration Changes between Environments** 491

- Repository migration 491
- Exporting and importing repository data 495
  - Exporting and importing selected repository objects 498
- Exporting and importing administrative data 498
- Application Deployment Manager (ADM) overview 501

**Summary** 503

**Appendix A: Installing a Siebel CRM Self-Study Environment** 505

- Hardware requirements 505
- Third-party software requirements 506

**Downloading and extracting Siebel CRM software installers** 506
- Registering at Oracle E-Delivery 506
- Understanding the license agreement 507
- Downloading the installation archives 507
- Extracting the installation archives 508
- Downloading Oracle Siebel documentation 508
- Extracting the Siebel installers 508
- Adjusting the browser security settings 509

**Installing Siebel CRM client software** 510
- Installing the Siebel Mobile Web Client 511
- Installing the Siebel sample database 512
- Installing Siebel Tools 513
- Configuring Siebel Tools to connect to the sample database 514
- Using the Demo Users Reference 514
# Table of Contents

## Appendix B: Importing Code Files
- Importing Siebel Tools archive files (SIF)  
  515
- Importing administrative data files  
  517

## Appendix C: More Information
- Getting trained  
  519
- Finding information  
  520
  - The Siebel Bookshelf  
    520
  - Oracle forums  
    520
  - My Oracle Support  
    521
  - The Internet community  
    521

## Index  
  523