Openspan

OpenSpan Elective Training

Using the OpenSpan Siebel Adapter

- CHAPTER 1: Using OpenSpan Studio with Siebel
- CHAPTER 2: Sample Project Data Transfer
- CHAPTER 3: Navigation Controls
- CHAPTER 4: Working with Pop-up Dialog Boxes

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CONVENTIONS

You can save time using this training guide by understanding how screen elements, input data, and definitions are shown.

| Convention | Meaning |
|-----------------------|--|
| Black bold characters | Names of program elements that require emphasis, such as command buttons, menus, and dialog boxes, are shown in black bold text. |
| Blue Bold Characters | Text that you are supposed to type or data selections, such as from drop-lists, appear in blue boldface characters. |
| <u>Remember</u> | Definitions of terms and important concepts that bear remembering. |
| | Next to the Tip icon, you can find best practices and shortcuts to use OpenSpan Studio more effectively. |

CONTENTS

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Chapter 1: Using OpenSpan Studio with Siebel

OpenSpan projects can be used to integrate with Siebel and automate Siebel user actions. This document provides details on integrating Siebel with OpenSpan projects and includes step-by-step instructions for creating sample OpenSpan Siebel projects.

Prerequisites

This guide requires a working knowledge of OpenSpan Studio. The tutorial also assumes that you are familiar with the Siebel application.

The course exercises require your system to be setup with the following:

• OpenSpan Studio 4.5

Supported

OpenSpan Studio supports Siebel versions 7.5, 7.7, 7.8 and 8.0. The OpenSpan web adapter is used to integrate Siebel into O`penSpan projects. Since Navigation elements do not exist in Siebel 7.5, OpenSpan Studio cannot interrogate them. Furthermore, the methods GetHeading, GetHeadings, and GetColumnFromHeading are not implemented for Siebel 7.5. For more information on Siebel properties, methods, and events see the OpenSpan online Help topic: **Siebel Control – Properties, Methods, and Events**.

Solutions Used in this Training Module

Practice files you will use while working through the step-by-step exercises presented in this training guide can be <u>downloaded here</u>. Finished solutions are available from the same download location as a reference for checking your work after completing the exercises on your own.

Setting up Internet Explorer to Use Siebel

- 1. Siebel must be added as a trusted site in Internet Explorer Options.
- 2. Trusted Sites security setting must be set to Low.
- 3. ActiveX controls must be allowed to run in Internet Explorer. This is turned on by default when the security setting is **Low**.

Note: On some systems the popup blocker must be set to allow pop-ups for the Siebel site. The settings required for Internet Explorer may vary depending on the individual Siebel installation.

Identifying Web Application Pages and Controls

Siebel Application Pages

The structure of the Siebel application uses multiple frames which house the active web pages. During navigation of the application, the frames are hidden and then come into focus as needed by the application. The same page may exist on multiple, different frames. When interrogating the application, using the **Create Global Web Page** option will ensure that the pages are matched without the frames. This way, no matter which frame currently shows the page, the page will be matched.

When you identify (via interrogation) a new web page, make sure to modify the **Document URL** match rule and use a **Query** string that is unique to identify that form as follows:

| | <u> </u> | Ma | tch Rules | |
|-------------------------|---|---|---|---|
| escmbar&SWEBID≕1&SWETS≓ | Si | ✓ ✓ | Document Url Match Document Title Match | Rule h Rule |
| | > | Со | ntrol Children Match Ru | le 💌 New |
| | | Sel | ected Match Rule | |
| | ~ | | Desian | ~ |
| | | - | (Name) | documentUrlMatchRule |
| Siebel. | | | FullName on Siebel | Siebel.documentUrlMatchRt |
| WebAdapter-8CAD2643988 | | | Uniqueld on Siebel | WebAdapter-8CAD2643988 |
| | | | Misc | |
| 0, 0, 255 | | Ð | Control | Siebel_Call_Center1 |
| 205, 213, 238 | | Ð | Fragment | |
| SWEUAID=none; _sn=0 | | Ð | Host | siebel.openspan.com |
| windows-1252 | | Ð | Path | /callcenter_enu/start.s |
| 64BD008 | | | Port | 99 |
| siebel.openspan.com | | P | query | swescrnbar |
| utf-8 | | | Culture | (User Culture) |
| False | | | IgnoreCase | True |
| | | | Mode | Contains |
| 0, 0, 0 | | | | |
| | escrnbar&SWEBID=-1&SWETS= Siebel. WebAdapter-8CAD2643988 0, 0, 255 205, 213, 238 SWEUAID=none; _sn=0 windows-1252 648D008 siebel.openspan.com | esembar&SWEBID=-1&SWETS= Si Siebel. WebAdapter-8CAD2643988 0, 0, 255 205, 213, 238 SWEUAID=none; _sn=C windows-1252 64BD008 siebel.openspan.com | Siebel. WebAdapter-8CAD 2643988 0, 0, 255 205, 213, 238 SWE UAID=none; _sn=C windows-1252 64BD 008 siebel. openspan. com | Siebel. WebAdapter-8CAD2643388 O, 0, 255 Sibel. WebAdapter-8CAD2643388 WebAdapter-8CAD2643 |

Siebel Application Controls - ElementID Match Rule

The Web adapter which is used for Siebel applications attempts to use the Element ID match rule, by default, in matching targets as this is the most efficient target matching method. However, it may be necessary to remove the Element ID match rule and use the Element Index and/or Element Inner Text match rules under the following circumstances:

- Dynamic Element IDs for some Siebel controls, dynamic Element IDs are used by the application. This means that the Element ID changes each time the control is created. For example, dynamic Element IDs are used for controls in pop-up windows. Each time the window is re-opened, the IDs for the controls change.
- Active Siebel Development Environments For environments where there are frequent updates to the Siebel version, do not use the Element IDs because these change with each Siebel rollout.

When Interrogating a Siebel target and the Element ID Match Rule is used, check to make sure the ID is static by navigating away from the control and then navigating back to it. If the control is still matched, the ID has not changed and the Element ID Match Rule can be used. However, if the Element ID Match Rule shows that the control is no longer matched, change the match rules for the target. Use the following steps to update match rules in these cases:

1. Set **UseElementId** to False in the properties for the control or select **Disable Use ElementID for this control** as show below:



- 2. Delete the Element ID match rule.
- 3. Add the Element Index match rule.
- 4. Set the Use Element ID property to False.
- 5. Add the Element Inner Text match rule.
- 6. Set the Use Element ID property to False.

Chapter 1: Using OpenSpan Studio with Siebel

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Chapter 2: Sample Project – Data Transfer

This project shows how to automate Siebel through OpenSpan Studio to:

- Login
- Get data from a list
- Initiate a process (make an appointment)

Automating the Login Process

The following automation sets up an automatic login to the Siebel training site used for this exercise.

- 1. Create a new solution called Siebel Test.
- 2. Add a Web Application Item (Web adapter). Name it Siebel.
- 3. Change the **StartPage** property to the login page for your Siebel system. For example, <u>http://siebel.openspan.com/callcenter_enu/start.swe</u>
- 4. Start Interrogation.
- 5. Interrogate the User Name and Password fields.
- 6. Interrogate the Login button.



- 7. Stop Interrogation.
- 8. Save the solution.

- 9. Add a new automation. Name the automation Login
- 10. Complete the **Login** automation as shown below.

| 🕪 SWEUserName 📀 | 💩 SWEUserName 🖄 | abl SWEPassword | * | 🔏 Login 🔹 🔊 |
|-----------------|------------------|-----------------|---|------------------|
| Created O | 🔶 Properties 🛛 🔶 | > Properties | • | > PerformClick 🔍 |
| | Text: sadmin | Text: siebel123 | 0 | |

- 11. To automate the login, set the SWEUserName Text to the username you use to login (e.g., sadmin), and the SWEPassword Text to the password you use to login (e.g., Siebel123).
- 12. Save the solution.
- 13. Run the project. It should automatically login to the Siebel site.



Get Data from Siebel List

Build the following automation that obtains data from the first page after initial login.

- 1. Start Interrogation.
- 2. Log in to Siebel. (User = sadmin; Password = siebel123)
- 3. With the "Create Global Web Page" Checked, Interrogate the "My Activities" List of the first screen and rename the control SiebelList1 to MyActivitiesList:

| File E | dit View N | avigate Query Tool | s Help | | | | |
|------------|------------------|--|---|---|---------|---------------------------------------|----------|
| 6 6 | 1 🕘 🗍 🎿 | i 🗹 📇 🥫 | | | | | |
| Home: | | | | | | | |
| Home | Accounts | 6 Contacts Opp | ortunities Sale | s Orders Service | Quotes | Administration - Product | |
| | | | | | Inte | errogation Form | × |
| Н | OME | Welcome Back Si October 27, 2005. | ebel Administrato | or. Today is Thursd | lay, | Drag capture icon over con Default | itrols. |
| | | | | | | 🔪 🛛 🗹 Ureate Global Web Pag | e 📘 |
| My A | ctivities | | | | | Create Global Web Pag | e - X |
| My A | ctivities New | Туре | Description | Priority | Activit | Create Global Web Pag | • |
| My A | ctivities New | Type Email - Outbound | Description Email Meeting Not | Priority | Activit | Create Global Web Pag | |
| My A | ctivities New | Type Email - Outbound Other | Description Email Meeting Not | Priority | Activit | Create Global Web Pag | |
| My A | ctivities New | Type Email - Outbound Other Other | Description Email Meeting Not jkgh am5 | Priority ific Bronx | Activit | Create Global Web Pag | |
| My A | ctivities New | Type Email - Outbound Other Other Other | Description Email Meeting Not jkgh am5 testing am4 | Priority ific Bronx Queens | Activit | Create Global Web Pag | |
| My A | ctivities New | Type Email - Outbound Other Other Other Other | Description Email Meeting Not jkgh am5 testing am4 Testing AM3 | Priority ific Bronx Queens Manhattan | Activit | Create Global Web Pag | |
| My A | ctivities New | Type Email - Outbound Other Other Other Other Other Other | Description Email Meeting Not jkgh am5 testing am4 Testing AM3 Testing AM 2 | Priority ific Bronx Queens Manhattan Staten Island | Activit | Create Global Web Pag | |

4. With the **Siebel_Web_Call_Center_Home** page selected within the Object Explorer, modify the **Document URL Match Rule** by adding a Query element to ensure this page is matched uniquely:

| Stop Interrogation | | 🔊 Siebel_Web_Call_Center_F 🏦 🍸 🐑 🗧 |
|--|-----------------------------|---|
| Match Rules Windows Web Controls | | ActiveXFactory |
| Targets | Match Rules | WicrosoftHTMLFactory Jebel_Call_Center_Subtraction_Wind Control |
| | Document Title Match Rule | Control |
| ∃=GetViewLayout <mark>≵SWEView=Home Page View</mark> <mark>WCC)&SWE</mark> | | 🔓 👰 Siebel_Call_Center |
| | | SWEEntryForm |
| | Control Children Match Rule | abl SWEUserName |
| Selected Target | Selected Match Rule | MyActivitiesList |
| | | |

- a. Using the Targets pane, find a unique piece of text in the query section of the URL to uniquely identify the page. (E.g. SWEView=Home Page View)
- b. From the Selected Target pane, copy the complete URL string. This text is used to test our Regex match rule settings.

| 8≣ ≵↓ 🖾 | | | | |
|--------------------|--|--|--|--|
| 🗆 Design | | | | |
| (Name) | | | | |
| FullName on Siebel | Siebel. | | | |
| Uniqueld on Siebel | WebAdapter-8CBBC82441BB460\EMPTY | | | |
| 🗆 Misc | | | | |
| ActiveLinkColor | 0, 0, 255 | | | |
| BackColor | 255, 255, 255 | | | |
| Cookie | SWEUAID=none; _sn=wLPmM6Cd2Dhvwg | | | |
| DefaultEncoding | windows-1252 | | | |
| Document ID | 1F03220 | | | |
| Domain | siebel.openspan.com | | | |
| Encoding | utf-8 | | | |
| Focused | False | | | |
| ForeColor | 0, 0, 0 | | | |
| IsAttached | True | | | |
| LinkColor | 0, 0, 255 | | | |
| ReadyState | Complete | | | |
| RightToLeft | False | | | |
| Title | 🔀 Siebel Web Call Center Home | | | |
| Url | c1147396238%257c1152921636_0_19213_000 | | | |
| VisitedLinkColor | 128, 0, 128 | | | |

c. Make sure you have the **Document Url Match Rule** selected in the **Match Rules** group box. From the **Selected Match Rule** groupbox expand the **Query** group by clicking on the +. Click into the Query area and click on the more button to open the **Match Rule Editor** dialog.

| (Name) | documenti iriMatchBule2 |
|--------------------|--|
| FullName on Siebel | Siebel. documentUrlMatchRule2 |
| Uniqueld on Siebel | WebAdapter-8CBBC82441BB460\DocumentUrlMa |
| 🗉 Misc | |
| Control | Siebel_Web_Call_Center_Home |
| 🕀 Fragment | |
| 🕀 Host | siebel. openspan. com |
| 🗄 Path | /callcenter_enu/start.swe 🛛 😽 |
| Port | 80 |
| 🗉 Query | |
| Lulture | (User Luiture) |
| IgnoreCase | True |
| Mode | Simple |
| | |
| Text | |

- d. Using the Match Rule Editor dialog, set and test the regex settings.
 - i. Test Input field: Paste the URL you copied in the step above.
 - ii. Text Field: SWEView=Home%20Page%20View%20
 - iii. Mode: Contains

NOTE: Notice that the Test is matched correctly. Now click the OK button the Match Rule Editor to accept your changes.

| Match Rule Editor | |
|--|---|
| Match Rule Text: SWEView=Home%20Page%20 | JView%20 |
| Mode: Contains | re: • Culture) V Ignore Case Escape |
| Input: | Matched |
| http://siebel.openspan.com/c &SWEView=Home%20Page% %2bUniversal%2bAgent_37%2 _L | allcenter_enu/start.swe?SWECmd=GetViewLayout 20View%20(WCC)&SWEVI=&SWEVLC=0-1_Siebel 57c1147396238%257c1152921636_0_19213_000 |
| | OK Cancel |

5. Stop Interrogation and create a windows form as follows:

| 🔜 Design Form | Object Explorer |
|---------------|---|
| | 🗉 Windows Form |
| Get Data | Windows Form Controls btnGetData A lbDescription A lbPriority |
| Туре | A IbIType abl txtDescription abl txtGetData abl txtPriority abl txtPriority |
| Description | the output |
| Priority | |

- 6. Label the items as shown in the Object Explorer image above.
- 7. Create a new automation. Name it **DataMove**.

8. This automation retrieves the information in the second, third and a fourth column for a given row in the Siebel list and outputs the values to textboxes on the Windows form. To retrieve data from these columns, the Column parameter on the SiebelList Siebel.GetCellValue method is set to 2, 3, and 4 respectively as shown in the following automation image. Complete the DataMove automation as follows:



- 9. Save and run the project.
- 10. Once the login automation is complete and the Home page displays, enter a row number into the Get Data text field on the Design Form. Press the Get Data button. An example of the active Design Form is shown below:

| 🖶 Design Form | |
|---------------|-------|
| Get Data | 3 |
| Туре | Other |
| Description | am5 |
| Priority | Вголх |

11. Stop the project.

Initiate a Process

The following steps create an automation which adds an appointment to the calendar shown on the first page of the Siebel system.

Perform the following steps:

- 1. Create a new automation. Name it MakeAppointment.
- 2. With the "Create Global Web Page" Checked, start the Interrogator.
- 3. Log in to Siebel.
- 4. Interrogate the New button in the Calendar area. You should now have a "New" link element in the Object Explorer under the same page as the "MyActivitiesList".

| My Calendar | - × | 🖮 👰 Siebel_Web_Call_Center_Home |
|---------------------------|--------------|---------------------------------|
| Date: Aug 💌 4 💌 2005 💌 | Go | MyActivitiesList |
| Today Weekly Monthly | \checkmark | |
| Thursday 8/4/2005 New | | |
| 08:00 AM (no description) | ~ | |

- 5. Click the **New** button to move to the Calendar Detail Tab.
- 6. Interrogate the **Description Field** and the **Save This One** Button.

| Save All | Delete | |
|----------------|---|-----------------|
| | | |
| | | - 4 > |
| 3ox1 (=) 🏦 | ∇ . | |
| | | |
| get Factories | | |
| oal Web Pages | | |
| Calendar_Detai | il | |
| 🙏 Save_This | One | |
| 📕 siebelT extB | lox1 | |
| Siebel_Call_Ce | nter | |
| Siebel_Web_C | all_Cente | er_Home |
| | Save All Sox1 (=) A get Factories bal Web Pages Calendar_Deta A Save_This SiebelTextE Siebel_Call_Ce Siebel_Web_C | Save All Delets |

 Modify the Document URL Match Rule for the Calendar_Detail page to ensure that the page is uniquely matched. Modify the query string of the Document Url Match Rule. (e.g. SWEView=eCalendar%20Detail%20View):

| Ma | tch Rule Editor | | | | | × |
|----|---|---|--------------------------|--|---|---|
| | Match Rule Text: SWEView=eCalendar%2 | 20Detail%20View | | | | |
| | Mode: | Culture: | | _ | | |
| | Contains 💌 🗸 | (User Culture) | * | 🗹 Ignore Case | Escape | |
| | Test | | | | | |
| | Input: | | | | Matched | |
| | http://siebel.openspan. &SWEView=eCalendar% iversal%2bAgent_37%29 | com/callcenter_er %20Detail%20View 57c1147396238% | nu/sta /&SWI 257c1 | rt.swe?SWECmd=(EVI=&SWEVLC=0- 152921636_0_192 | GetViewLayout 1_Siebel%2bUn 213_000_L | |
| | | | | ОК | Cancel | כ |

- 8. Stop Interrogation.
- 9. Modify the Design Form to include a "Make Appointment" button and another text box.

| 🔜 Design Form | |
|---------------------|--|
| Get Data | |
| Туре | |
| Description | |
| Priority | |
| Make Appointment | |

- 10. Name the Make Appointment button **btnMakeAppointment**.
- 11. Name the new text box **txtMakeAppointment**.

12. Complete the MakeAppointment automation as shown below:

| Windows Form1 btnMakeAppointment Click | Siebel ® A New PerformClick | Siebel Siebel VaitForCreate Result <i>True</i> <i>False</i> | Siebel SiebelTextBox1 Properties Siebel.Text | Siebel Siebel Save_This_One PerformClick |
|--|-----------------------------------|--|---|---|
| | | Windows Form1 🔹 |) | |
| | | abl txtMakeAppointment | | |
| | | Properties | • | |
| | | Text | ν | |
| | | | | |

- 13. Save and Run the solution.
- 14. Wait for the Login automation to run.
- 15. Enter a description into the text field next to the Make Appointment button on the design form.
- 16. Press the Make Appointment button. The application will navigate to the Calendar tab, enter the appointment, and then return to the Home tab. See the following result; however remember the entry will be for the current time of day:

| My Calendar | |
|----------------------------|-----------|
| Date: Jun 💌 23 💌 2005 💌 Go | |
| Today Weekly Monthly | |
| Thursday 6/23/2005 | New 🕨 🕨 |
| 08:00 AM | <u>^</u> |
| Test | |
| 09:00 AM | |
| | |

17. Stop the project.

This page intentionally left blank.

Chapter 3: Navigation Controls

There are two different visual controls that OpenSpan identifies as a SiebelNavControl. The first being the Navigation tabs and the other being a combobox with the white backing.

| F | ile Edit View | Navigate | Query | Tools H | Help | | | | | |
|----|---------------|-----------|-------|---------|----------|------------------|---------|---------------|---------------------|-------------------|
| | è 🛅 🕘 🗍 | 🎿 💆 🖥 | 🗄 🥫 | | | | | | | |
| Ac | count: | | | | | | | | | |
| | lome Accou | nts Conta | acts | Opportu | nities | Sales Orders | Service | Quotes | Administration | - Product |
| Ac | counts Home | Accounts | List | Charts | Global / | Accounts Hierarc | hy List | Global Acco | unts Administration | n Account Manager |
| | My Accounts | 🕶 📔 Me | enu 🔻 | New | / Delete | Query | | | | |
| | New | Name | Δ | Site | ; | Parent | Ν | Aain Phone # | Status | Account Type |
| | | 4444 | | Evita | | Deuleen | 1 | 1000 456 7000 | 0 otines | Branch |

When adding navigational tabs, you will not be able to interrogate the individual tabs.



You must interrogate the entire Navigation control (as shown above). Once the control is added it appears as a SiebelNavControl in the object explorer:



Right-click on the SiebelNavControl and select the Add Nav Item option from the context menu.

| 🖃 👰 Siebel_C | all_Center1 | | | |
|--------------|----------------|--------|----------------------|---------------|
| | Navigate To | | 1 | |
| 🖃 🔊 Siebel_\ | Expand All | | | |
| A Nev | Add Dynamic Me | mbers | Interrogation Form | × |
| | Add Nav Item | | | une nantenia |
| | Delete | Del | Diag captule icon of | rer controis. |
| | Highlight | Ctrl+H | Create Global We | eb Page |

The Add Navigation Items dialog displays. Click on the desired tab button in Siebel and then name it appropriately in the Add Navigation Items window to create the navigation objects. During the creation of the navigation items, checking the "Cancel Navigation" checkbox stops the Siebel application from taking any action while allowing OpenSpan to capture the link. You must uncheck the "Cancel Navigation" checkbox if you want Siebel to navigate to the desired link.

Chapter 3: Navigation Controls

| e <u>E</u> dit <u>V</u> iev | ew F <u>a</u> vorites <u>T</u> ools | Help | | | | | |
|---|--|---|--|--------------------------------|---|----------|---|
| Back • (| 0 - 🖹 🛢 (| 🏠 🔎 Search 🤸 | Favorites 🙆 | 🖉 - 🍓 🗖 | Add Navigation Items | | |
| ress 🖉 http: | p://siebel.openspan.com | /callcenter_enu/start.sw | ve?SWECmd=Login& | SWEPL=18SWETS= | Click on pavination items within Siebel to canture them | | |
| lo Edit Mini | Nevianto Quero | Taolo Holo | | | When a navigation items is captured, it will appear in the list below if the "Cancel Navigation" checkbox is | | Toterrooption Form |
| Fle Edit View Navigate Query Tools Help | | | | | checked, navigation will not occur when an item is | | |
| | | | | | navigation to occur. | | Drag capture icon over controls |
| ne: | Contractor | Oran estimation Colo | | | Cancel Navigation | | Default |
| ome Acco | counts contacts | Opportunities sale | is orders servi | ice Quotes A | | | Create Global Web Page |
| | | | | | Contacts | | |
| | | | | | Home | | |
| | | | | | | | |
| HOM | FWe | lcome Back Siebel A | dministrator. Too | day is Saturday, J | Opportunities | | My Calendar |
| HOM | E we | elcome Back Siebel A | dministrator. Too | day is Saturday, J | Opportunities | | My Calendar |
| НОМ | E we | elcome Back Siebel A | dministrator. Too | day is Saturday, J | Opportunities | | My Calendar Date: Jun V 18 V 2005 Go |
| HOM Iy Activities | IE we | elcome Back Siebel A | dministrator. Too | day is Saturday, J | Opportunities | | My Calendar Date: Jun v 18 v 2005 v Go Today Weekly Monthly |
| HOM Iy Activities New | IE We es w Type | Icome Back Siebel A | dministrator. Too Priority | day is Saturday, J Activity | Opportunities | | My Calendar Date: Jun V 18 V 2005 V Go Today Weekly Monthly Saturday 6/18/2005 |
| HOM Iy Activitie: New | es w Type Other | Icome Back Siebel A Description jkgh | dministrator. Too Priority | day is Saturday, J Activity | Opportunities | | My Calendar Date: Jun V 18 V 2005 Go Today Weeky Monthly Saturday 616/2005 06:00 AM |
| HOM Iy Activitie: New | We | Hoome Back Siebel A Description jkgh amS | dministrator. Too Priority Bronx | day is Saturday, J Activity | Opportunities | | My Calendar Dete: Jun v 18 v 2005 Go Today Weeky Monthly Saturday 6/12/2005 |
| HOM Iy Activities New | E We es W Other Ot | Icome Back Siebel A Description jkgh am5 testing am4 | dministrator. Too Priority Bronx Queens | day is Saturday, J Activity | Opportunities | * | My Calendar Date: Jun V 18 V 2005 Go Today Weeky Monthly Saturday 6/8/2005 08:00 AM 09:00 AM |
| HOM Ily Activities New | E We bes w Type Other | Acome Back Siebel A Description jkgh am5 testing am4 Testing AM3 | dministrator. Too Priority Bronx Queens Manhattan | day is Saturday, J Activity | Opportunities | ■X ▲ | My Calendar Date: Jun V 18 V 2005 Go Today Weekly Monthly Saturday 6/18/2005 05:00 AM 09:00 AM |
| HOM My Activities New | E We bes type Other Ot | Acome Back Siebel A Description jkgh am5 testing am4 Testing AM3 Testing AM 2 | ministrator. Too Priority Bronx Queens Manhattan Staten Island | day is Saturday, J Activity | Opportunities | | My Calendar Date: Jun v 18 v 2005 v Go Today Weeky Monthly Saturday 6/8/2005 08:00 AM 09:00 AM 09:00 AM 10:00 AM 09:00 AM |
| HOM My Activities New | E We ss v Type Other Other Other Other Other Other Notes | Icome Back Siebel A jkgh am5 testing am4 Testing AM3 Testing AM 2 Testing AM 1 | dministrator. Tor Priority Bronx Queens Manhattan Staten Island Brooklyn | day is Saturday, J Activity | Opportunities | × | My Calendar Date: Jun V 18 V 2005 V Go Today Weeky Monthly Saturday 6/18/2005 08:00 AM 09:00 AM |
| HOM My Activities New | w Type Other Other Other Other Other Other Notes Other | Icome Back Siebel A Jegh am5 testing am4 Testing AM3 Testing AM 1 cook | dministrator. Too Priority Bronx Queens Manhattan Staten Island Brooklyn | day is Saturday, J | Opportunities | | My Calendar Date: Jun V 18 V 2005 CG Today Weekly Monthly Saturday 6/18/2005 05:00 AM 05:00 AM 10:00 AM 11:00 AM |
| HOM My Activitie: New | BS W Vher Oth | Icome Back Siebel A Description Jegh am5 testing am4 Testing AM3 Testing AM3 Testing AM1 cook | dministrator. Too Priority Bronx Queens Manhattan Staten Island Brooklyn | day is Saturday, J Activity | Opportunities | | My Calendar Date: Jun V 18 V 2005 Go Today Veekly Monthly Saturday 6/18/2005 05:00 AM 10:00 AM 11:00 AM |

To interrogate a sub menu item, uncheck the **Cancel Navigation** checkbox to allow Siebel to navigate to a menu items page. Recheck the **Cancel Navigation** checkbox and click each desired sub menu item to add them to the list.

| Add Navigation Items | |
|--|---|
| Click on navigation items within Siebel to capture them. When a navigation items is captured, it will appear in the list below. If the "Cancel Navigation" checkbox is | File Edit View Favorites Tools Help Links 🌄 Acronym Finder 🕎 Dictionary.com 🖉 Index of - 😵 Rally Login 🚾 Weather 🖉 Web Mail - In Office 🖉 Web Mail - Out of Office |
| checked, navigation will not occur when an item is clicked. Uncheck "Cancel Navigation" to allow navigation to occur. | 😪 🏟 🎉 Siebel Service |
| Cancel Navigation | File Edit View Navigate Query Tools Help |
| Home | 🜐 🖆 🔯 🔁 |
| Service | Service Request: |
| Service Requests Home | Home Service Activities Assets Inventory |
| siebel Navitem 1 | Service Requests Home Service Request List Service Request Charts Service Requests - Help Desk Agent Charts Explorer |
| | |
| | |

When you close the Add Navigation Items dialog, each selected navigation object then appears under the SiebelNavControl in the Object Explorer.



Sub menu items are added to the list just as menu items. They do not appear in a subordinate format in the Object Explorer. Sub Menu items may be directly called within an automation.



Exercise – Automating Navigation

Use the steps which follow to create a project which automatically navigates to the Contact List page.

Create Navigation Controls

- 1. Return to the Siebel Test solution you completed in the earlier exercise.
- 2. Start the Interrogation of the Siebel application. Login to the application to open the Home page.
- 3. With the "Create Global Web Page" checked; Interrogate the Navigation bar near the top of the window:

| Interrog | jation Form 🛛 🔀 | s Internet Explorer | |
|----------|---|---|--------------------|
| 0 | Drag capture icon over controls. Default | span.com/callcenter_enu/start.swe?SWECmd=Login&SWEPL=1&_sn=VqaIj5KVP28NHAwhg0X28Lpoon7GIIkOhb.Vmf 💙 🚱 🗙 Live Search | • |
| | 🗹 Create Global Web Page | | |
| | 🚖 💠 🌈 Siebel Call Center | | Page 🔹 🎯 Tools 🔹 🎇 |
| | File Edit View Navigate Query | y Tools Help | noward by SIEBEL |
| | 🖺 🛅 🕘 🛛 🖾 💆 📇 [| Queries: Default |) 🏓 🔎 🖌 |
| | Home: | | |
| | Home Accounts Contacts | Opportunities Sales Orders Service Quotes Administration - Product Calendar | |

 Check the matching targets for the page (Siebel_Call_Center1) associated with the Navigation bar:



Note that multiple pages match the target. Make sure that you do NOT click on another URL within the Targets window when attempting the next step.

5. Modify the Query portion of the Document URL Match Rule to uniquely match this page. The full URL for the page is:

http://siebel.openspan.com/callcenter_enu/start.swe?SWENeedContext=false&SWECmd=GetC achedFrame&SWEACn=12033&SWEC=2&SWEFrame=top._sweclient._swescrnbar&SWEBID=-1&SWETS=

The unique portion is "swescrnbar". So we can modify the **Mode** property for the Rule to indicate that the Text must contain the text string swescrnbar. Click on the **Query** property for the Document URL Match Rule to open the editor.

6. Complete the Match Rule Editor as shown below:

| Match Rule Editor | | × |
|---|--|---|
| Match Rule Text: | | |
| swescrnbar | | |
| Mode: | Culture: | |
| Contains 🛛 👻 | (User Culture) VIgnore Case Escape |] |
| ⊂ Test | | 5 |
| Input: | Matched | |
| http://siebel.openspan. SWECmd=GetCachedF clientswescrnbar&SW | com/callcenter_enu/start.swe?SWENeedContext=false& Frame&SWEACn=17678&SWEC=3&SWEFrame=topswe /EBID=-1&SWETS= | |
| · | OK Cancel | |

- 7. Click **OK** to close the Editor and then click the **Refresh** matching button. Only the desired page should appear in the **Targets** pane.
- 8. Highlight the SiebelNavControl object in the **Object Explorer**, right-click and select **Add Nav Item**. The **Add Navigation Items** dialog displays.
- 9. Select the **Cancel Navigation** checkbox. Click on the Contacts link in Siebel and then rename the object created in the **Add Navigation Items** dialog as **Contacts**.

| File Edi | t View Nav | /igate Query Tools | Help | | |
|---------------|------------|--|------------------|---|-------|
| B 🔓 | که 🛛 🌑 | 💆 📇 🥫 | | Add Navigation Items | 1 |
| Home: Home | Accounts | Contacts Oppo Welcome Back Sie 2005. | ortunities Sale | Click on navigation items within Siebel to capture them. When a navigation items is captured, it will appear in the list below. If the "Cancel Navigation" checkbox is checked, navigation will not occur when an item is clicked. Uncheck "Cancel Navigation" to allow navigation to occur. | oduct |
| My Ac | tivities | | | Contacts | |
| | New | Туре | Description | | |
| > | | Email - Outbound | Email Meeting No | | |
| | | Other | jkgh | | |
| | | Other | am5 | | |

- 10. Clear the **Cancel Navigation** checkbox. Navigate to the Contacts page by selecting the Contacts link in the application.
- 11. Check the **Cancel Navigation** checkbox. Click on the Contacts List link and rename the added link to **Contacts List**. Your **Add Navigation Items** dialog should look like the following:

| Add Navigation Items | × |
|--|--------------------------|
| Click on navigation items within Siebel to capture When a navigation items is captured, it will appear the list below. If the "Cancel Navigation" checkbo checked, navigation will not occur when an item is clicked. Uncheck "Cancel Navigation" to allow navigation to occur. | hem. ∵in x is s |
| Cancel Navigation | |
| Contacts | |
| Contacts List | |
| | |

12. Close the **Add Navigation Items** dialog. The links appear in the **Object Explorer** under the SiebelNavControl:



13. Stop the Interrogator.

Complete Automate Navigation Solution

The following steps create an automation that will automate navigating to the Contacts Lists page.

1. Modify the Design Form. Add a button near the top of the form. Name the button **btnContacts** and set the Text property to **Go To Contacts**.

| MakeAppointment.os MoveData.os | 🗢 🗙 Object Explorer |
|--------------------------------|---|
| Design Form | ab btnContacts Windows Form1 ab btnContacts ab btnContacts ab btnGetData |
| Get Data | A label1 A label2 Methods for: ab btnContacts |
| Туре | |

- 2. Create a new automation: NavContacts.
- 3. Connect the **btnContacts** Click event to the **Contacts Lists** Navigate method. The Complete automation is shown below:

| 😪 NavContacts.xml 🗙 | | |
|------------------------------|---------------------|---|
| 🛃 🎲 🟮 🥝 🕕 🔍 🔍 🝭 💆 100% | - | |
| | | |
| | | |
| B Windows Form1 * | Siebel | * |
| ab btnContacts | ContactsList | |
| Click | -Xo Siebel.Navigate | |

Note: You do not have to first navigate to the Contacts page and then invoke the Contacts List link.

- 4. Save and run the project.
- 5. Once the Home page has loaded, click the Go to Contacts button on the Design form. The Contact List will load.

Chapter 3: Navigation Controls

This page intentionally left blank.

Chapter 4: Working with Pop-up Dialog Boxes

Siebel contains popup dialogs accessible from multivalue and SiebelList controls. The following exercise demonstrates working with a popup dialog.

Exercise – Popup Dialog

This exercise pushes data from the Windows form used in the previous exercise to the Contacts page in Siebel to create a new contact. Part of the process is assigning an account representative for the contact. This is done by selecting the account representative in a popup dialog accessed from a multivalue control.

1. Open the solution used in the previous exercise and save it as **Siebel Test 3**.

| 🖶 Design Form | | |
|---------------------|--------------------|--------------|
| | | |
| Get Data | Go To Contacts | txtLastName |
| Туре | Last Name | txtEirstName |
| Description | First Name | |
| Priority | Accounts | |
| Make Appointment | Create Contacts | IbxAccounts |
| | btnCreateContacts | |

2. Open the Windows form and modify it as shown below:

Note: The names of the controls are as shown in the image above. Use the names of your account representatives in the List box.

- 3. Save the solution.
- 4. Open the web adapter for the Siebel application and start the Interrogator.
- 5. Login and navigate to the Contact List page.

- 6. With the **Create Global Web Page** checked, Interrogate the New button/link near the bottom of the page. Also interrogate the **Last Name**, **First Name**, and **Account** controls. Name the controls as you add them:
 - a. Last Name = SiebelTxtLastName
 - b. First Name = SiebelTxtFirstName
 - c. Account = SiebelMultiValueControl1Account

Note: All Siebel specific controls are identified in the **Object Explorer** with a prefix **Siebel**. When interrogating a textbox for example, the **Object Explorer** shows three controls are added: **SiebelTextBox1→Control1→txtTextBox1**. The only control what should be used within an automation is the Siebel Component.

| 🖉 Siebel Call Center - Windows Internet Explorer | | | | | | | | | | |
|--|---------------------|-------------------|-----------------------|-------------------|--------------------|---------------------------|-------------------|---------------------|----------------|------------|
| 🕘 - 🔊 | http://siebel.opens | pan.com/callcente | r_enu/start.swe?SWECn | nd=Login&SWEPL=18 | SWETS=122123564 | 3125 | * | 😽 🗙 🛛 Live Search | | |
| File Edit View | Favorites Tools | ; Help | | | | | | | | |
| 🔊 • 🔎 • | » 🌍 SnagIt 🚦 | | | | | | | | | 100000 |
| 🚖 🕸 🏉 Siebe | el Call Center | | | | | | | | 🖶 🔹 🔂 Page 🔹 🄇 | Fools - * |
| File Edit View | Navigate Query | Tools Help | | | | | | | powered by | SIEBEL |
| B D 0 | 🔬 💆 📇 🥫 | 1 | | | | | Querie | s: * All Contacts | . 🗢 🎾 | > ↓ ₩ |
| Contact: | | | | | | | | | | |
| Home Accoun | ts Contacts | Opportunities | Sales Orders Se | rvice Quotes | Administration - P | roduct Mu Toomia Unive | veo Bu Crecistu | Contact Administrat | lion | |
| My Contacto | Magure | New Dela | | ist charts in | lanager 3 Explorer | my roun's onlyc | rise by specially | Contact Administra | 1 10 05 10 1 | |
| Last Name | Firet Name | Mr/Me | Account | Work Phone | # Personal Ad | drees City | State | Postal Code | Fmail | Con |
| | Siebel | WII ANIS | Actount | Work Phone | 13133 | New City | State | Fun in the sun | sadmin@siebel. | com 🛣 |
| Bronx | Supervisor | | | | | , | | | | |
| Brooklyn | Supervisor | | | | | | | | | |
| Channel Partner | Guest | Ms. | | (678) 527-540 | 0 1105 Universi | ty Ave New York | NY | 10452 | | _ |
| Customer | Guest | Dr. | | (678) 527-540 | 1 | | | | | |
| Ghosh | Sid | Mr. | | (678) 527-545 | 0 | | | | | |
| Kewl | Dude | Ms. | | (678) 527-544 | 4 | | | | | |
| Kim | Nancy | | 1111 | | | | | | sadmin@siebel. | om |
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| Manhattan | Assign | | | | | | | | | ¥ |
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| Siebel Admin | nistrator | | | | | | | | 🔳 1 of 1 | 0+ |
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| Job Ti | itle: Sys Admin | | Mobile Phone #: | | Cit | y: New City | | State: | | |
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7. Click on the popup button in the Account control to open the Accounts page. Interrogate the Available list, Add and OK button/link. Rename the SiebelList to SiebelListAccount the other control names are fine.

| 🖹 Accounts - Microsoft Internet Explorer | | | | | | | | | | | | |
|--|---|------------------|------------------|---------------|---------------|---------------|-------|-------------|---------|-------------|---------------|--------|
| File | Edit View Fa | avorites Tools | Help | | | | | | | | G Back - " | |
| Addi | Address 🕘 http://siebel.openspan.com/calcenter_enu/start.swe?5WECmd=ShowPopupFrames&SWEDIC=1&SWEU=/calcenter_enu/start.swe%3f5WECmd%3dGetCachedFrame%265WEC%3c 💌 🔁 Go | | | | | | | | | | | |
| Links | : 🕘 Customize Lini | ks 👸 Free Hotn | nail 🥘 Windows 👏 | Windows Marke | tplace 🙋 Wind | lows Media | | | | | | _ |
| N | ew Query | | | | | Find | Accou | int | ▼ Sta | arting with | | G |
| A٧ | ailable | | | | 1 - 10 of 10+ | | Sele | cted Delete |] | | 1 - | 1 of 1 |
| | Account | Location | Account Class | Туре | Main Ph | | | Primary | Account | Site | Account Class | Sta |
| > | Paulson | 2 | Customer | Customer | (212) 🛣 | | > | | Paulson | 2 | Customer | Act |
| | Julia Roberts | 2 | Customer | Customer | (917) 📥 | | IΓ | | | | | |
| | Halle Berry | 1D | Customer | Customer | (718) | Add > | | | | | | |
| Rt | o activate and use t | his control | Customer | Customer | (718) | | | | | | | |
| | Pierce Brosnan | 6A | Customer | Customer | (718) | < Remove | | | | | | |
| | Greg Kinnear | 1C | Customer | Customer | (718) | << Remove All | | | | | | |
| | Eva Mendes | 1B | Customer | Customer | (212) | | | | | | | |
| | Kevin James | 4C | Customer | Customer | (212) | | | | | | | |
| | Drew Barrymore | 20 | Customer | Customer | (212) 🗸 | | | | | | | |
| L | Cameron Diaz | 1A | Customer | Customer | (212) 🐺 | | | | | | | |
| 4 | | | | | Þ | | • | | | | | • |
| | | | | | | | | | | | L | OK |

8. In the Object Explorer, highlight the Accounts page. Note that multiple pages are matched in the Targets pane. To correct this situation, modify the match Document URL Match Rule. The URL for the page that needs to be matched is the one that **does not contain** the string "ShowPopup" in the Query section. Your Match Rule Editor should look like the following:

| Match Rule Editor | | | X |
|-------------------|----------------|--------------------------|---|
| Match Rule | | | |
| ShowPopup | | | 1 |
| Mode: | Culture: | | |
| DoesNotContain 💌 | (User Culture) | 🔽 🗹 Ignore Case 🛛 Escape | |
| Test Input: | | | |
| | | | |
| | | OK Cancel | |

9. Click OK to save the Match Rule Editor entries and then click the Refresh Matching button. Only one page should match:

http://siebel.openspan.com/callcenter_enu/start.swe?SWECmd=GetCachedFrame&SWEC=10& SWEFrame=top._sweclient._swecontent._sweview._swetmp&SWESP=1 10. For the Add button/link, change the match rule from Element ID to Element Inner Text Match Rule. (e.g. Text = Add >). Make sure you set the "UseElementID" property to False after you delete the ElementID Match Rule.

| 🕼 OpenSpan Studio | | | | | | | | | | | | _ - X | |
|---|----------------------|-------------------|---------------|---------------------|---------|-------------|------------------------|----------------------------|-----|-----------------------|-------------------|--------------|--|
| File Edit View I | Debug Tools I | Help | | | | | | | | | | | |
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| -0 | | | Stop Inte | ronation | | | | | 4 | Add_ | (= 🐴 🕚 | マッド・ | |
| Solutic Interrogatio | on Form | × | | nogoson | _ | | | | | Siebel | | | |
| 😑 🔂 Si | | | Match Rules | Windows Web Control | ols | | | | | | | | |
| | Irag capture icon ov | er controls. | Targets | | | | Match Rules | | | Global Web Pages | | | |
| | Jetault | <u> </u> | 🔽 🖬 🖉 | L 🖸 | | | 🗾 Element Inner Text M | atch Rule | | | | | |
| S 🛃 🕑 | Create Global We | sb Page | Tag Name | e Text Attached T | o l | | | | | OK Sinh | all inté a courat | | |
| Windows For | n1 | | 🜌 A | Add > Add_ | | | | | | 🗄 💽 Calendar | Detail | | |
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| | | | | | | | Anchor Name Match Rule | V New | | in the state _ c | /eb_Call_Center_ | Home | |
| | | | | | | | | | | | | | |
| 🖉 Accounts - Windo | ows Internet Ex | plorer | | | | | Selected Match Rule | | | | | | |
| 🕞 🕞 👻 🙋 http | ://siebel.openspan. | com/callcenter_er | u/st 💙 🔸 > | Google | | ρ- | 8≣ 2↓ 🖾 | | | | | | |
| New Query | Find Accou | nt | Star | ing with | | Go | Design | | | | | | |
| | 10000 | 1 | | | 1 | | FulName on Siebel | Siebel.innerTextMatchRule1 | | | | | |
| Available | | 1 - 10 of 10+ | / | Selected Delete |] | 1 1 - 1 011 | Uniqueld on Siebel | WebAdapter-8CC407E 9A91584 | | | | | |
| Account | Location | Account Cla | | Primary | Account | Site | E Misc | Add | | | | | |
| > Paulson | 2 | Customer 🛓 | | > ~ | Karen | | ⊞ Text | Add > | | | | | |
| Julia Roberts | 2 | Customer | 1 | | | | | | | | | | |
| Halle Berry | 1D | Customer - | Add > | | | | | | | | | | |
| Gwyneth Pattrow | 2A | Customer | | | | | | | | | | | |
| Pierce Brosnan | 6A | Customer | < Remove | , | | | | | | | | | |
| Greg Kinnear | 10 | Customer | << Remove All | J | | | | | | | | | |
| Eva Mendes | 18 | Customer | | | | | | | | | | | |
| Nevin James | 40 | Customer | | | | | | | | | | | |
| Cameron Diaz | 10 | Customer | | | | | | | | | | | |
| Cameron Diaz | 10 | | | 4 | | F | | | | Wethods for: 🌧 Adr | 1 | T | |
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- 11. For the OK button/link, change the match rule from Element ID to Element Inner Text Match Rule. (e.g. Text = OK). Make sure you set the "UseElementID" property to False after you delete the ElementID Match Rule.
- 12. Stop the Interrogator.
- 13. Create a new automation: CreateContact. Complete the automation as shown below:

| abtnCreateContact ≆ Click | A New1 * PerformClick • Properties • • Text • | SiebelTxtFirstName * Properties • Siebel Text • Properties • Properties • Properties • Properties • Properties • | SiebelTxtLastName | Siebel MultiValueControl 1Account |
|---|--|---|---|-----------------------------------|
| SiebelListAccount WaitForCreate Result <i>True</i> <i>False</i> | BAccount Properties SelectedIndex | Add_ * | SiebelListAccount Siebel.CellPerformClick 2 OK PerformClick | 8 |

Automation Notes:

- The siebelListAccount.WaitForCreate method is required as the automation must ensure the SiebelListAccount is created before calling the Siebel.CellPerformClick method.
- The Numeric Expression is required in this automation as the Index of the Listbox starts at the value of 0 and the Row values for the SiebelList2 start at 1.
- The behavior of the Siebel Popup windows is to be moved off screen when closed not destroyed. It is only destroyed by the action of bring the window back into focus. (For example, calling the ShowPopUp method or clicking in Siebel.) To work around this behavior we must use the "Detach" method which tells the OpenSpan Platform that the screen has been destroyed. Now when Siebel creates a new one and brings it into focus we can see the creation.
- 14. Save and run the project. Once the login page has passed, click the Go To Contacts button on the Windows Form. When the contacts list displays, enter a name in the Last/First name fields on the Windows Form and select an Account Manager name. Next, click the Create Contact button. The Last Name and First Name fields should populate in Siebel and then the Accounts page should open. Your manager should automatically be selected and the Accounts page closes. The manager name will appear in the Account field.