



Contact Center Advisor Integration Guide

Using Contact Center Advisor with InQira Applications

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This guide provides detailed instructions and supporting information for installing and configuring InQira Contact Center Advisor for use with an InQira 8.1 application. This guide is intended for application developers and systems administrators who need to plan for and perform integration of Contact Center Advisor with an InQira 8.1 application and a supported CRM application.

This preface includes information on:

- The general organization of this guide
- The support services available from InQira Customer Support
- The available product documentation

In This Guide

The *Contact Center Advisor Integration Guide* is divided into the following sections:

<i>Chapter 1, InQuira Contact Center Advisor</i>	This chapter describes InQuira Contact Center Advisor installation, installed directories and files, product components, and the integration process.
<i>Chapter 2, Configuration Scenarios</i>	This chapter provides an overview of the different ways Contact Center Advisor can be configured to interoperate with CRM applications.
<i>Chapter 3, Deploying the Contact Center Advisor in a Siebel Environment</i>	This chapter describes how to import and deploy the Contact Center Advisor components into the Siebel environment using Siebel Tools.
<i>Chapter 4, Configuring Content Integration</i>	This chapter describes how to configure the Contact Center Advisor components that make InQuira 8.1 application available to the Siebel application.
<i>Chapter 5, Configuring Data Integration</i>	This chapter describes how to configure the data transfer between the InQuira 8.1 application and the Siebel application.
<i>Chapter 6, Configuring the Contact Center Advisor Integrated User Interface</i>	This chapter describes how to adjust the height of the search results frame within the Siebel application.

Contacting InQuira

You can contact InQuira by mail, telephone, fax, and email.

Address:	851 Traeger Ave. Suite 125 San Bruno, CA 94066
Telephone:	(650) 246-5000
InQuira Customer Support Hotline:	(888) 947-8324
	NOTE: See <i>InQuira Customer Support</i> on page 4 for more information on reporting incidents to InQuira Customer Support.

Fax:	(650) 264-5036
Email:	For sales information, send email to sales@inquira.com . For product support, send email to support@inquira.com .
World Wide Web:	Learn more about InQira products, solutions, services, and support on the world wide web at: www.inquira.com .

InQuira Customer Support

InQuira Customer Support is available from 6:30 am to 4:30 pm PST, excluding InQuira holidays.

For Priority 1 incidents, such as when a production system hangs or crashes, or when continued use of the product is impossible, please use the support hotline: (888) 947-8324.

IMPORTANT: We accept Priority 1 requests only by telephone. We recommend that you send a follow-up email for Priority 1 requests after contacting InQuira Customer Support using the support hotline.

For Priority 2, 3, and 4 incidents, as described below, please contact InQuira Customer Support by email at: support@inquira.com.

Incident response times are determined by the following priority definitions:

Priority	Contact	Response Time	Definition
1	The InQuira Customer Support hotline: (888) 947-8324	1 business hour	A production system hangs or crashes, or continued use of the product is impossible.
2	support@inquira.com	8 business hours	The product is usable with major restrictions on functionality.
3	support@inquira.com	16 business hours	The product is usable with minor restrictions on functionality.
4	support@inquira.com	3 business days	You have a question or an enhancement request pertaining to the software or the documentation.

InQuira Product Documentation

InQuira documentation is available only to licensed users of our software products and may not be redistributed in any form without express permission from InQuira, Inc.

The InQuira documentation is available in PDF format. It is packaged in the `/docs` directory, within the `/inquire` directory, for example:

```
<InQuira_install_dir>/inquire/docs
```

NOTE: You need a PDF reader application installed on each processor on which you plan to view the InQuira product documentation. The Adobe Acrobat reader is available from Adobe Systems at: <http://www.adobe.com>.

Detailed information about each product document set is available in:

- [Intelligent Search Documentation on page 6](#)
- [Intelligent Search Analytics Documentation on page 7](#)
- [Information Manager Documentation on page 8](#)
- [Contact Center Documentation on page 9](#)

If you encounter a problem, need help using the documentation, or want to report an error in the content, please contact InQuira Customer Support as described in [InQuira Customer Support on page 4](#).

If you need help obtaining InQuira product documentation, or want to obtain permission to redistribute a portion of the contents, please contact your InQuira account representative.

Intelligent Search Documentation

Intelligent Search is distributed with the following documentation.

Document	Number	Description
Intelligent Search Installation Guide	IS80-IG-00	This guide is intended for technical staff who are responsible for installing InQuira 8.1. It provides detailed information on installing InQuira 8.1 and configuring the application on a single processor using the Installation Configuration Environment facility.
Intelligent Search Administrator's Guide and Reference	IS80-CA-00	This guide is intended for system and application administrators who need to configure an InQuira 8.1 application in an enterprise environment. It describes InQuira 8.1 integration, development, configuration, and maintenance processes and tasks.
Intelligent Search Language Administration Guide	IS80-LA-00	This guide is intended for business users and subject matter experts who need to create and maintain the language processing elements of a InQuira 8.1 application using the System Manager. This book provides usage information about the System Manager, conceptual information about the InQuira 8.1 language objects, and task information about the process of managing the user experience provided by the InQuira 8.1 application.
Intelligent Search Tuning Guide	IS80-LD-00	This guide is intended for application developers who need to create and maintain advanced InQuira 8.1 language-processing elements using the Dictionary and other InQuira Language Workbench applications.
Optimizing InQuira Intelligent Search	IS80-AG-00	This guide is intended for application developers who need to implement InQuira 8.1 advanced features, including Personalized Navigation and Process Wizards.
Intelligent Search Application Developer's Guide	IS80-API-00	This guide provides information about integrating and customizing the InQuira 8.1 Personalized Response User Interface.

Intelligent Search Language Reference	IS80-LRG-00	This guide is for language developers implementing InQuira 8.1 applications that utilize the intent libraries and advanced language processing functions. These guides are published as separate documents that provide reference information for each industry-specific intent library. Each reference also contains complete descriptions of InQuira Match Language and Variable Instantiation Language.
Intelligent Search User Interface Guide	IS80-UI-00	This guide is intended for application developers who need to customize the InQuira 8.1 Personalized Response User Interface, and integrate it with a production web application. It contains information about the elements and features of the User Interface, and provides guidelines for integrating it into an enterprise web architecture, customizing its appearance and functionality, and implementing various special features.

Intelligent Search Analytics Documentation

Intelligent Search Analytics is distributed with the following documentation.

Document	Number	Description
InQuira Analytics Installation Guide	IA80-IG-00	This guide is intended for technical staff who are responsible for installing Intelligent Search Analytics. It provides detailed information on installing and configuring the Intelligent Search Analytics product for use with an InQuira 8.1 application.
Analytics User Guide	IA80-CA-00	This guide is intended for systems and application administrators who need to configure the Intelligent Search and Information Manager Analytics components to report on InQuira 8.1 application performance.

Information Manager Documentation

InQuira Information Manager is distributed with the following documentation.

Document	Number	Description
Information Manager Installation Guide	IM80-IG-00	This guide is intended for technical staff who are responsible for installing InQuira Information Manager. It provides detailed information on installing and configuring the Information Manager product.
Information Manager Administration Guide	IM80-CA-00	This guide is intended for systems and application administrators who need to configure and administer an InQuira Information Manager application, and integrate it with an InQuira 8.1 application. It also contains information for general business users who need to use the Information Manager to create and manage content.
Information Manager Content Authoring Guide	IM80-AG-00	This guide is intended for technical staff who are responsible for authoring content in InQuira Information Manager. It provides detailed information on creating content and managing workflow tasks in the Information Manager console.
Information Manager Developer's Guide	IM80-WSR-00	This guide is intended for application developers who need to integrate Information Manager content, content category, and user and security functions with external applications. It contains reference information and examples for all packages, classes, methods, and interfaces of the Information Manager Web Services API.

Contact Center Documentation

The InQuira 8.1 contact center products are distributed with the following documentation.

Document	Number	Description
Contact Center Advisor Integration Guide	CA80-IG-00	This guide is intended for application developers and systems administrators who need to plan for and integrate the InQuira Contact Center Advisor with an InQuira application and a supported CRM application.
Intelligent Search Siebel Integration Guide	CAS80-IG-00	This guide is intended for application developers and systems administrators who need to plan for and integrate InQuira 8.1 with Siebel 7 Enterprise Applications using the Siebel Adapter for InQuira 8.1.

Screen and Text Representations

The product screens, screen text, and file contents depicted in the documentation are examples. We attempt to convey the product's appearance and functionality as accurately as possible; however, the actual product contents and displays may differ from the published examples.

References to World Wide Web Resources

For your convenience, we refer to Uniform Resource Locators (URLs) for resources published on the World Wide Web when appropriate. We attempt to provide accurate information; however, these resources are controlled by their respective owners and are therefore subject to change at any time.

Chapter 1 InQuira Contact Center Advisor

Contact Center Advisor for InQuira 8.1 provides a complete intelligent search interface that enables contact center agents to quickly and easily find accurate answers to customer inquiries from within their CRM dashboard.

Contact Center Advisor leverages InQuira's patented Intelligent Search technology to find exact answers to inquiries based on their meaning, and to search unstructured content, structured data sources and transactional business applications in parallel. The InQuira technology can automatically incorporate customer context, call context, and CRM contextual information in the search for answers to customer inquiries.

Contact Center Advisor user interface is embedded within the CRM desktop, designed to maximize agent productivity and minimize keystrokes, improving call resolution rates. The answers are more than just mere links to source content; they also include relevant excerpts that have a high probability of answering the inquiry based on their meaning.

Contact Center Advisor significantly streamlines the call wrap-up process by automatically providing embedded links to associate the right enterprise knowledge with each service request resolution task.

Contact Center Advisor Installation

The Contact Center Advisor is installed as part of the Siebel Adapter for InQuira 8.1 installation process as described in the *Intelligent Search Siebel Integration Guide*. When you install the Siebel Adapter for InQuira 8.1, the Contact Center Advisor components are installed as described in [Contact Center Advisor Installed Directories and Files on page 12](#).

Contact Center Advisor Installed Directories and Files

The tables below show the installed directories and files for the Contact Center Advisor and Siebel Adapter for InQuira 8.1 (where installed), and the files shared by both.

The Contact Center Advisor installation process creates the following directory in <InQuira home>\archive:

<InQuira_home>\archive\siebel

The `siebel` directory contains the following sub-directories and files:

Directory	Description
<code>cca</code>	This directory contains the Contact Center Advisor components.
<code>crawler</code>	This directory contains the Siebel Adapter for InQuira 8.1 components. See the <i>Intelligent Search Siebel Integration Guide</i> for more information on the Siebel Adapter for InQuira 8.1.
<code>common</code>	This directory contains the components shared by both Siebel Adapter for InQuira 8.1 and Contact Center Advisor

The `cca` directory contains the following Contact Center Advisor directories and files:

Directory	Description
<code>sif</code>	This directory contains the following Siebel Integration Files (SIF) for the Contact Center Advisor, which are imported into the Siebel environment during the deployment process: S_SRV_REQ_XM.sif Service Request BO.sif Service Request Detail Applet.sif Service Request Screen.sif Siebel Universal Agent.sif
<code>datamapper</code>	This directory contains the file, <code>InQuiraServiceRequest.XML</code> , which is used in the data integration process.
<code>template</code>	This directory contains the InQuira 8.1 search applet, <code>InQuiraSearchApplet.swt</code> for deployment into the Siebel environment.
<code>workflow</code>	This directory contains the InQuira 8.1 workflow <code>InQuira HTTP Inbound.xml</code> for deployment in the Siebel environment.

The `crawler` directory contains the following Siebel Adapter for InQira 8.1 files:

File	Description
sif	<p>This directory contains the Siebel Integration Files, which are imported into the Siebel environment during the deployment process:</p> <p style="text-align: center;">Inqira Siebel Crawl.sif Solution SR-PD.sif Solution.sif</p>
xsl	<p>This directory contains the standard content converter stylesheets, <code>main.xsl</code>, which you copy into the InQira 8.1 application and the web server.</p> <p style="text-align: center;">main.xsl sr_transformation.xsl</p>
workflow	<p>This directory contains the packaged workflow processes that you deploy within the Siebel environment that locate the Integration Objects and write the associated data to XML files for access by the configured InQira 8.1 Siebel crawlers:</p> <p style="text-align: center;">Inqira Submit Full Index Request.xml Inqira Submit Incremental Index Request.xml InqiraCrawlXMLResponse.xml</p>

The `common` directory contains the following shared Contact Center Advisor and Siebel Adapter for InQira 8.1 sub-directories and files:

File	Description
sif	<p>This directory contains shared Siebel Integration Files, which are imported into the Siebel environment during the deployment process:</p> <p style="text-align: center;">Inqira Project.sif S_SRV_REQ.sif S_SRV_REQ_XM.sif Service Request.sif Service Request BO.sif</p>

The Contact Center Advisor Components

The Contact Center Advisor consists of the following components that you deploy within the CRM environment:

- Custom Siebel Projects packaged as Siebel Integration Files (SIFs) that you import and deploy as described in [Chapter 3, Deploying the Contact Center Advisor in a Siebel Environment](#)
- Custom user interface templates (InquireSearchApplet.swt) as described in [Deploying the InQira Search Applet Template on page 39](#)
- A custom Workflow (Inquire HTTP Inbound.xml) as described in [Chapter 5, Configuring Data Integration](#)
- The Data Mapper (InquireServiceRequest.xml) as described in [Chapter 5, Configuring Data Integration](#)

The Integration Process

Contact Center Advisor integration requires a complete and configured InQira 8.1 installation, as well as an installed supported CRM application.

You need access to Siebel Tools to import the Siebel Integration files (SIF) containing the InQira-supplied Siebel components.

The Contact Center Advisor deployment process consists of the following steps:

- Deploy the Contact Center Advisor components in the Siebel environment as described in [Chapter 3, Deploying the Contact Center Advisor in a Siebel Environment](#)
- Configure content integration as described in [Chapter 4, Configuring Content Integration](#)
- Configure data integration as described in [Chapter 5, Configuring Data Integration](#)
- Edit the Siebel user interface as described in [Chapter 6, Configuring the Contact Center Advisor Integrated User Interface](#)

Chapter 2 Configuration Scenarios

CRM and CCA can be configured to achieve the desired scenarios. This chapter describes the options for each of the following scenarios:

Scenario 1: Search in Context on page 17 Click to Search from with the CRM application and automatically capture fields from the Case, Service Request, or Incident to be used for the search.

Scenario 2: View Search Results on page 20 Search results are presented to the user in a JSP page that is driven by InQuira. This page can be embedded within the CRM application or be presented as a separate browser window.

A user can interact with the results page to continue to refine the search. This includes all aspects of InQuira which can be configured, such as faceted navigation, display options for results, and other portlets or process wizards. A user has the ability to view an answer provided within the page. Once a user clicks to view a document, the user can perform functions against that document, including functions available for Information Manager documents, such as recommend a change to the document if the user has privilege.

Scenario 3: Link a Document to a Case on page 22 When an answer is found it can be selected and attached or linked to the case. If the document is within Information Manager, the corresponding case is linked to the solution and the reuse count and document value is incremented.

Scenario 4: Unlink a Document from a Case on page 29

If a user determines that a solution did not resolve the case, the solution can be removed or unlinked. The corresponding case is removed from the list of case links for the solution, and the reuse count and document value is decremented.

In addition, the function provided for individual documents from Information Manager are available when viewing results from the web pages provided. These functions include document editing, recommending changes to documents, viewing change recommendations, rating, subscribing, and other useful functions for users.

The components of CCA include:

- Web Services to perform functions such as a search request, linking a document to a case, or unlinking a document from a case.
- A Results web page and other web pages which are used for displaying InQuira responses and for performing the majority of InQuira functions.
- JSP tag library functions to be used for configuring additional InQuira function within the CRM application, such as creating a draft document.

The following configuration will be needed within the CRM application:

- InQuira Search button in the case and the ability to capture case information when invoking this search button.
- InQuira Search tab to display the CCA results page when InQuira Search is invoked. Note, that this can also be implemented as a pop-up window instead of integrated within the CRM application.
- InQuira Solutions tab to place the solutions that get linked to the case
- Optional: InQuira Submit Draft or Recommend Content button for the case. This can also be done from the results page to force a search first.
- Optional: InQuira Unlink button in the InQuira Solutions tab next to each document. This can also be done when viewing the document.

Note to Development: Throughout this paper, we need to identify the manual steps for the Siebel implementation, assuming that nothing with Siebel or any CRM application gets installed and updated by InQuira. The updates for the CRM application need to be done using CRM tools and configuration options for InQuira. We can explain the CRM tool examples using Siebel.

Scenario 1: Search in Context

When a customer service or support representative or engineer is interacting with a service request, case, issue, or incident, the user is reviewing fields that contain a summary, description, and product or other categorization. Instead of entering search criteria from the case on a separate search browser, the information is automatically pulled from the case and used to invoke the search engine. The response page is then displayed with the results of the search.

The following shows an example with Siebel and with Salesforce.com of incorporating the invocation of search in context:

The screenshot displays the Siebel CRM interface. At the top, there's a menu bar with 'File', 'Edit', 'View', 'Navigate', 'Query', 'Tools', and 'Help'. Below that, a navigation pane shows tabs for 'Home', 'Accounts', 'Contacts', 'Opportunities', 'Orders', and 'Service'. The 'Service' tab is active, showing a list of 'My Service Requests'. The table has columns for 'New', 'SR #', 'Status', 'Summary', 'Account', 'Last Name', and 'Owner'. One request is selected, and its details are shown in a form below. A blue callout box with an arrow points to the 'Lookup Search' button in the form's header, containing the text: 'CCA Integration allows an agent to invoke search directly within the CRM environment'.

New	SR #	Status	Summary	Account	Last Name	Owner
	1-92751	Open	cl oppr smth			MEMTH
	1-92891	Open	Hardware streaming cl oppr		Smith	MEMTH
	1-92931	Open	Hardware streaming cl oppr		Smith	MEMTH
	1-93071	Open	can't get on line us of its will mean 8'		Smith	MEMTH
>	1-103281	Open	IP Access to vgl624		Smith	MEMTH
	1-103271	Open	problem connecting to switch in 31'			MEMTH
	1-10511	Open	transfer to recordings to issue			

1-103281

SR # 1-103281 Work Phone # Summary: int access to vgl624

Last Name: Smith First Name: Paul Description: want to securely network so only the PCs I administrate can access it

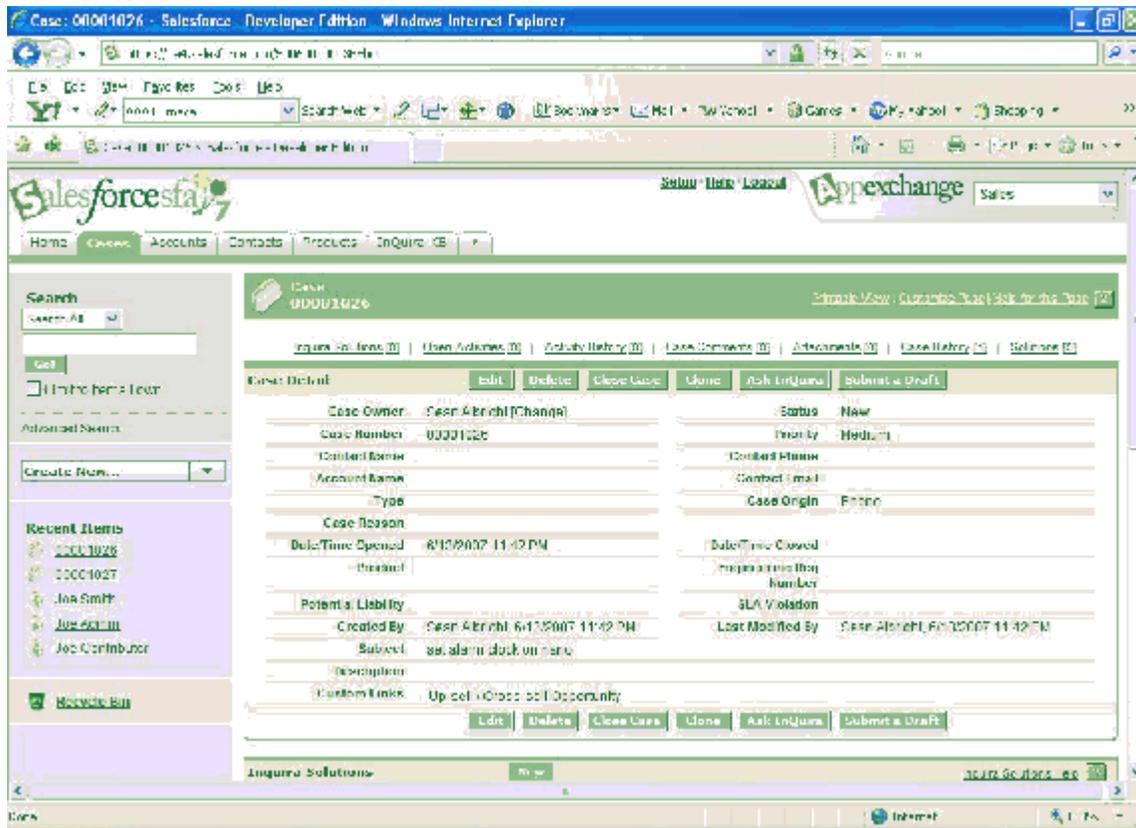
Account: Job: Arch: network *Status: Open

Prod: *Date Created: 2/20/06 11:48:10 *Solved: *Solution: Assigned

Product: vgl624 Date Modified: Source: Web Owner: MEMTH

CCA Integration allows an agent to invoke search directly within the CRM environment

The following is an example of searching in context within the Salesforce support application.



Configuration for Scenario 1

The ability to Search in context requires the following from a case page:

- A button that will invoke InQira and pass in parameters from the case
- Automatic formulation of a search query from the case text
- Automatic invocation of InQira search
- Display the search results in the case page

Siebel Example for Scenario 1

To create an **InQuira Search** button that invokes an InQuira search from the contents of a Siebel case and returns the results of the search, you would:

- Define a button called “InQuira Search” in the "Service Request Detail Applet" and save it in a SIF file named “Service Request Detail Applet.sif”.
- Define a business service "InQuira Function" to set the profile attribute "InQuiraButtonNavigation" as "question" and save it in a SIF file named “InQuira Project.sif”.
- Define a view called "InQuira Service Request Search View" that refers to the "InQuira Service Request Search Applet" and save it in the “InQuira Project.sif” file.
- Define an "InQuira Service Request Search Applet" that includes a list with a single list column, named "InQuiraSRSearchPage," to retrieve data out of Siebel according to the Symbolic URL "InQuiraSRSearchPage". Save it in the “InQuira Project.sif” file.

The above SIF files have already been created and are available for you to import into Siebel. To see the results:

- Import the “Service Request Detail Applet.sif” and “InQuira.sif” files, as described in [Importing Contact Center Advisor Integration \(SIF\) Files on page 34](#).
- In the Siebel tool, compile the “InQuira” and “Service (SSV)” projects and deploy the repository in Siebel, as described in [Compiling the Siebel Repository on page 40](#) and [Deploying the Updated Repository in the Siebel Environment on page 41](#).
- Go to call center to configure Symbolic URL "InQuiraSRSearchPage," as described in [Defining a Symbolic URL on page 46](#).

In the call center, after clicking the InQuira Search button in the cca.jsp page, there is a checkbox before each document. If the document is already attached to current case, the check box before it is disabled or can be clicked. It looks as following in the cca.jsp page:

Acad Answer to SR | book | Search

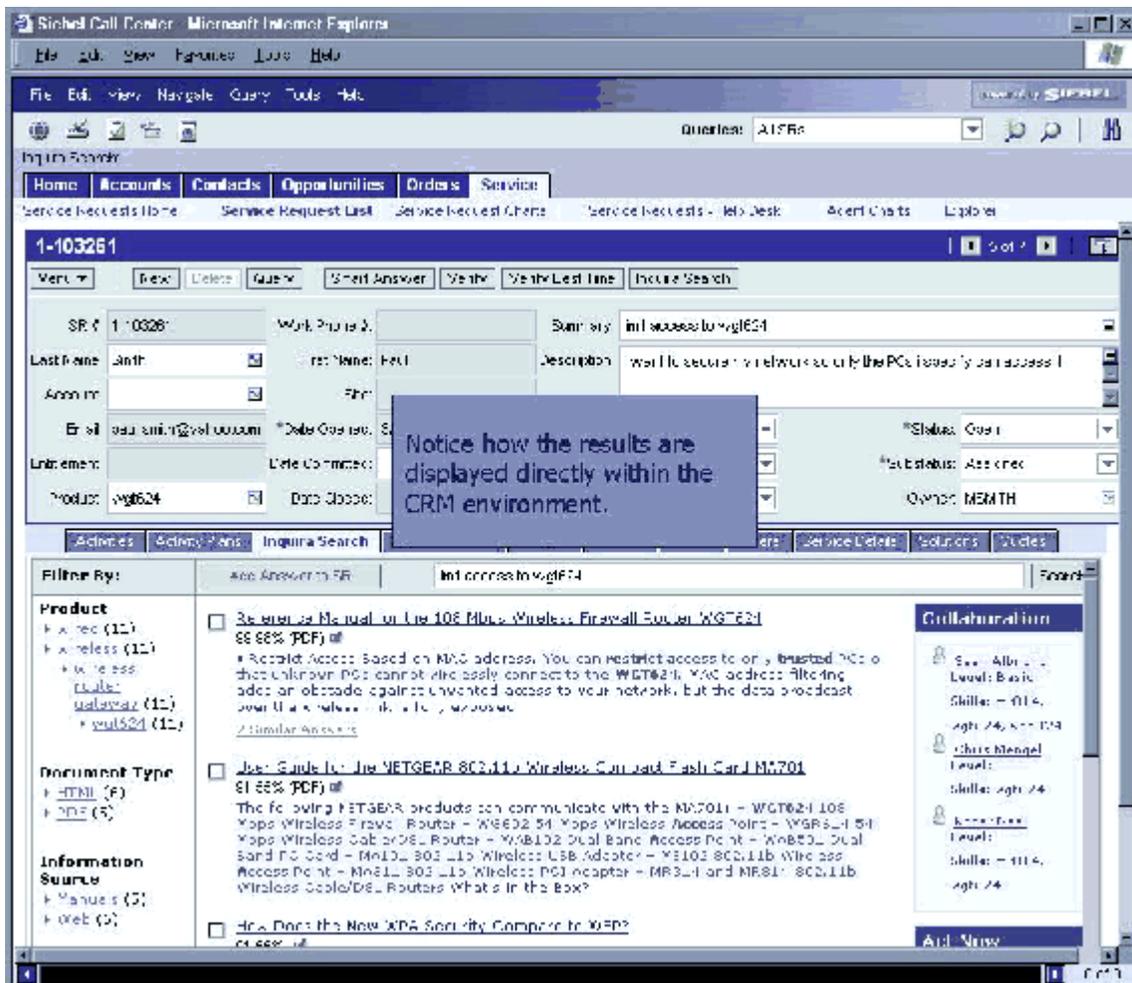
- InQuira Press Release 09-15-03 Press Releases INDUSTRY EXPERTS ASSERT WEB NOW VIABLE CHANNEL FOR CUSTOMER SERVICE Breakthrough **Book** Offers Best Practices On Integrating Web Self-Service With Tracitional Customer Service Channels for Maximum Efeciveness
- InQuira 8 (PDF) CUSTOMER SELF-SERVICE Customers want to help themselves Customers like to anc want to help themselves. Patty Seybold first pointed this out in 1998 n her landmark **book**, Cstmcrs.com, where she statec,

Scenario 2: View Search Results

Once the user invokes InQuira Search, results are returned in an InQuira results page. The elements of this page are controlled by InQuira, but can be displayed either within the CRM application or as a separate pop-up window.

The user can enter new search criteria, click on facets, or click on any of the answers. If a user clicks to view an answer, the document is presented and there is a way to click to return to the answer list or add the answer to the case when viewing it. In addition, the user can perform additional functions with InQuira that the user recognized to have privilege to perform, such as creating a new document.

The following is an example of what this might look like in the Siebel CRM application.



Note that the results page has a check box and an **Add Answer to SR** button. The procedure for adding this button is described in [Scenario 3: Link a Document to a Case on page 22](#).

Configuration for Scenario 2

The CCA Results page is supplied by InQira. This page can be embedded within the CRM application or used as a pop-window.

Siebel Example for Scenario 2

This section describes how to create an InQira Search tab to display of the CCA results page within Siebel.

To create an **InQira Search** tab:

- Define screen view “InQira Service Request Search View” in Screen "Service Request Screen" as an “InQira Search” tab. Save the screen view in a file named “Service Request Screen.sif”.
- Define an "Application_PreNavigate" event in the "Siebel Universal Agent" application and set profile attribute “InQiraButtonNavigation” as “refresh”. Save the results in a file named “Siebel Universal Agent.sif”.

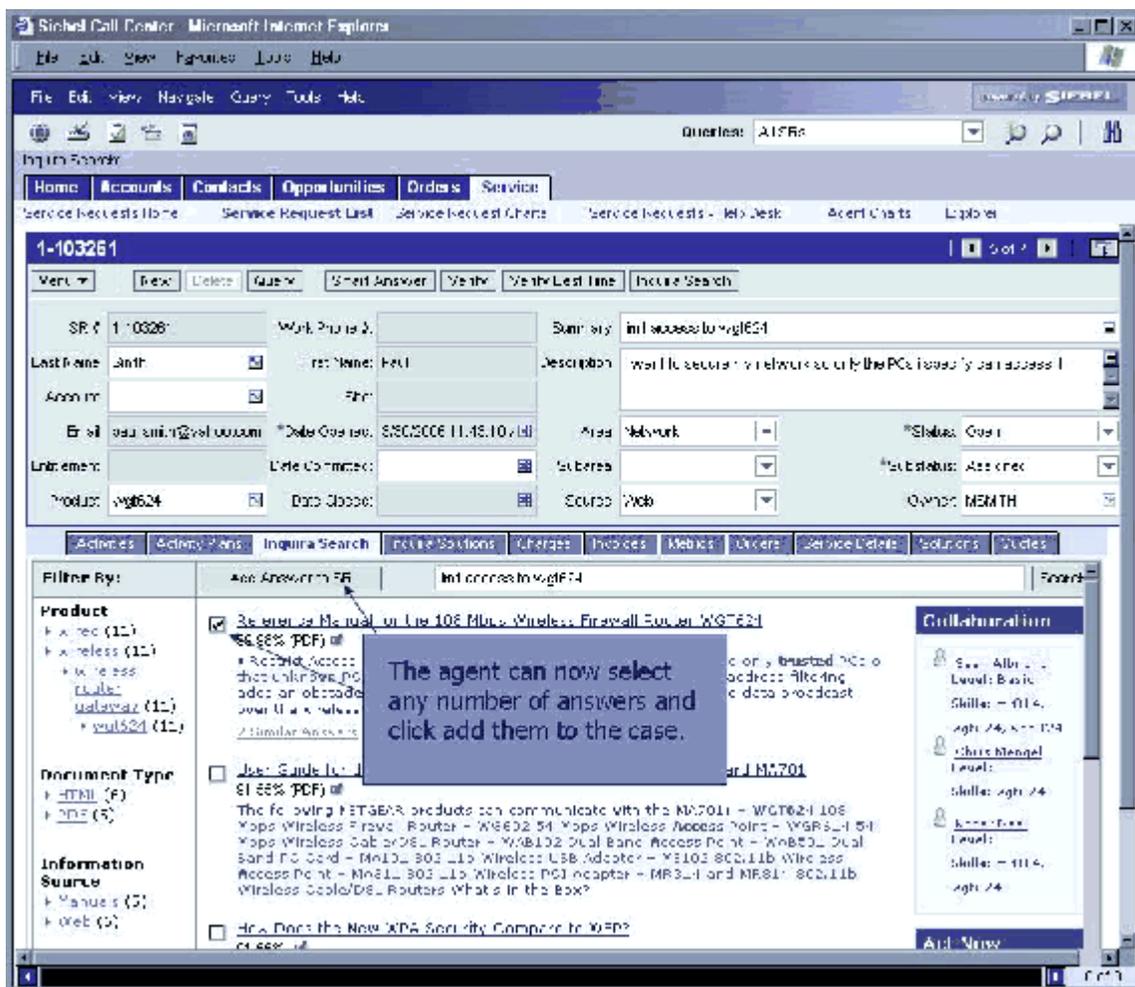
The above SIF files have already been created and are available for you to import into Siebel. To see the results:

- Import the “Service Request Screen.sif” and “Siebel Universal Agent.sif” files, as described in [Importing Contact Center Advisor Integration \(SIF\) Files on page 34](#).
- In the Siebel tool, compile the “InQira,” “Siebel Universal Agent,” and “Service (SSV)” projects and deploy the repository in Siebel, as described in [Compiling the Siebel Repository on page 40](#) and [Deploying the Updated Repository in the Siebel Environment on page 41](#).

Scenario 3: Link a Document to a Case

A user is provided the ability to link or attach an answer to a case. The answer could be an Information Manager document or an external document that InQuira has indexed and presented to the user. When attaching an answer to the case, InQuira will also attach the case to the corresponding Information Manager document, if the document is within Information Manager. This keeps a pointer to the case from the document, and a pointer to the document from the case.

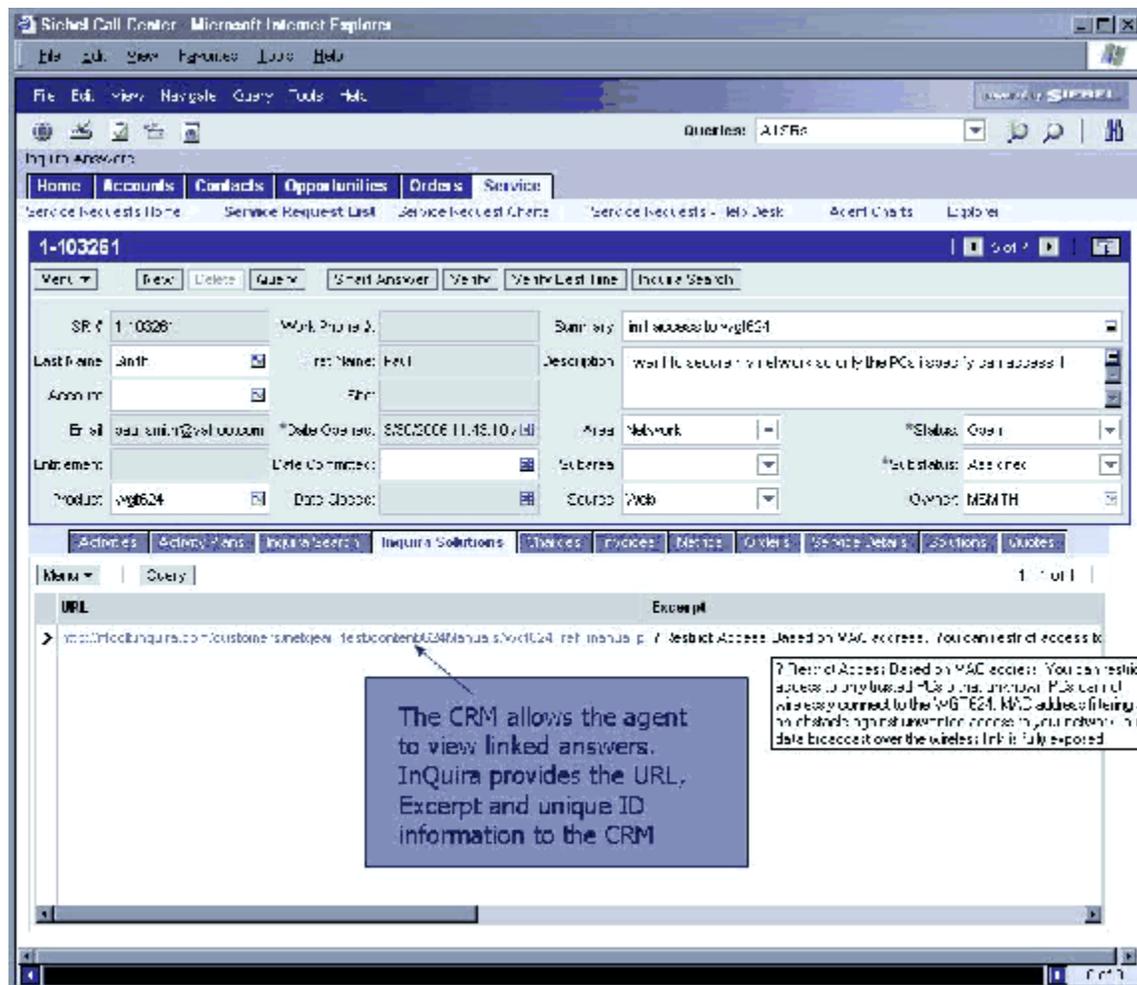
The following screenshot shows how a user can add an answer to a service request using Siebel.



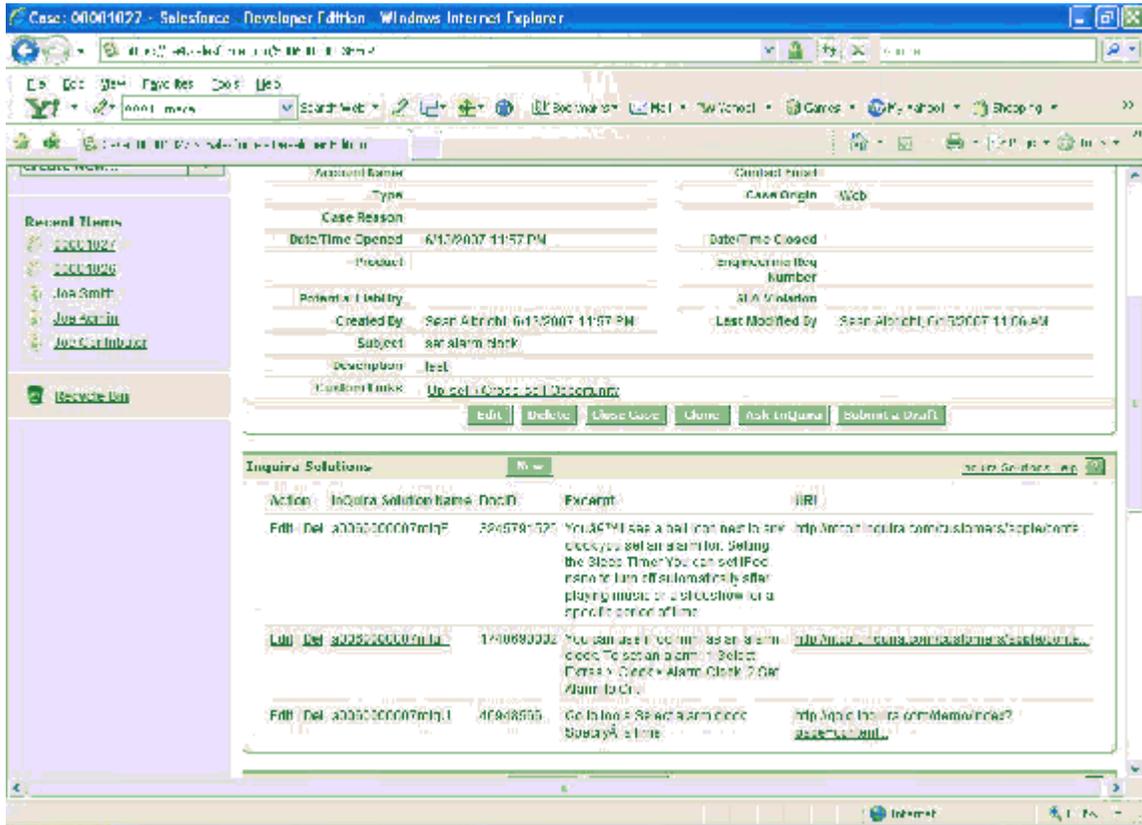
A user can add the answer to the service request from this CCA page of results by selecting the answer and clicking a button to add the answer to the service request. In addition, the user can view a specific document and click to add it to the service request while viewing it.

When adding a solution or document to a case, InQira is updating the InQira Solutions tab. This tab is created specifically to hold InQira Solutions linked to cases.

The following is what is saved for Siebel in the InQira Solutions tab.



The following is a similar example for Salesforce.com.



Adding an answer to a service request will also create a corresponding link between an Information Manager document and this service request, if the answer is an Information Manager document. Information Manager tracks the case ID, Summary, Incident Value, and the Date/Time the document was linked to the case.

Configuration for Scenario 3

The InQuira Solutions tab must be configured within the CRM application to the specification provided below. InQuira will add and remove entries in this section of the case in the CRM application.

Siebel Example for Scenario 3

To create an **InQuira Solutions** tab:

- Define a screen view “InQuira Service Request Answers View” in the "Service Request Screen" as an “InQuira Solutions” tab. Save the screen view in a file named “Service Request Screen.sif”.
- Define view "InQuira Service Request Answers View" which refers to applet "InQuira Service Request Answers Applet." Save the view in a file named “InQuira Project.sif”.

The above SIF files have already been created and are available for you to import into Siebel. To see the results:

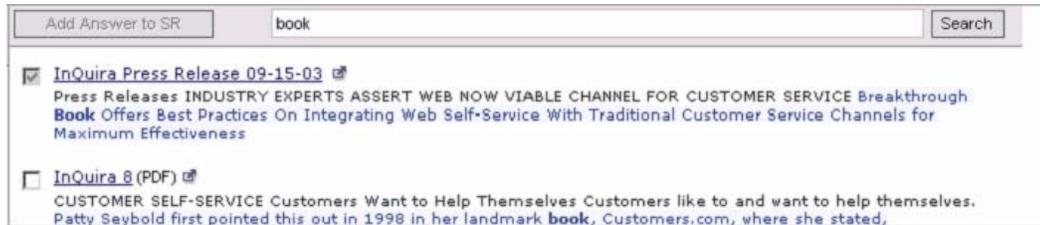
- Import the “Service Request Screen.sif” and “InQuira Project.sif” files, as described in [Importing Contact Center Advisor Integration \(SIF\) Files on page 34](#).
- In the Siebel tool, compile the “InQuira” and “Service (SSV)” projects and deploy the repository in Siebel, as described in [Compiling the Siebel Repository on page 40](#) and [Deploying the Updated Repository in the Siebel Environment on page 41](#).
- Go to call center and navigate to “Service - Service Request List - All Service Requests.” Select one service request record and click the link in SR# column to locate the **InQuira Solutions** tab. Click the tab to find the InQuira Answers added to current selected service request record. It looks as following:



URL	Excerpt	Comments
http://www.inquiracom/releases/pr_030915.asp	INDUSTRY EXPERTS ASSERT WEB NOW VIABLE CHANNE	

- You also can delete InQuira Answers record here by right click the certain record and click “Delete Record”.

You can configure the cca.jsp page for the InQuira Search tab to automatically perform the link for IM documents when the **Add Answer to SR** button is pressed:



- After clicking button, the "CCASiebelHandler.java" file creates an XML string that identifies the answers selected and current service request record.
- Send the request with the XML string to Siebel to attach answers to service request.
- The JAVA file "CCASiebelHandler.java" can be configured. In data.xml, we have following configuration:

```
<choices>
  <cca-handler name="Siebel">com.inquirarequest.cca.CCASiebelHandler</cca-handler>
</choices>

<cca>
  <handlerImpl name="Siebel">com.inquirarequest.cca.CCASiebelHandler</handlerImpl>

  <definedHandler name="ABC">
    <class keyref="cca.handlerImpl[Siebel]" />
    <url>http://HOST:PORT/eai_enu/start.swe</url>
    <username>username</username>
    <password>password</password>
    <properties>
      <values name="Key">some additional config value</values>
    </properties>
  </definedHandler >
  <definedHandler name="DEF">
    <class keyref="cca.handlerImpl[Siebel]" />
    <url>http://HOST:PORT/eai_enu/start.swe</url>
    <username>username</username>
    <password>password</password>
  </definedHandler >
  <defaultHandler keyref="cca.definedHandler[ABC]" />

  <cca-url>http://HOST:PORT/eai_enu/start.swe</cca-url>
  <handler keyref="choices.cca-handler[Siebel]" />
</cca>
```

- The elements “cca.handlerImpl” defines a map for the implementation classes' names of interface “com.inquirarequest.cca .CCASolutionHandler.” Each element is corresponding to one key-value pair. The attribute “name” defines the key and the element value defines the value. For example, here it only defines one implementation class's name (“com.inquirarequest.cca .CCASiebelHandler”). The key is “Siebel.”
- The elements “cca.definedHandler” defines a map for instances candidates of interface “com.inquirarequest.cca.CCASolutionHandler” in map.
 - It will get one from the map by the key passed from CRM system. For example, SIEBEL will pass “siebel” to InQuira as the key. If it can not find one by the key, it will get from element “cca.defaultHandler”.
 - In each element, the sub element “class” defines the full name of implementation class. It only can select value from the map defined by “cca.handlerImpl”. For example, here it select the one whose key is “Siebel”. The sub elements “url”, “username”, “password” and “properties” are used for initialization.

For example, here it defines two instances candidates. The keys are “ABC” and “DEF”. Both of them select “cca.handlerImpl[Siebel]” for implementation class name.

- The element “cca.defaultHandler” defines default instance of interface “CCASolutionHandler”. It only can select from map defined by “cca.definedHandler”. For example, here it select “cca.definedHandler[ABC]” as the default instances. If this element is not configured, it will get from element “cca.handler”.
- The element “cca.handler” defines the instance of interface “CCASolutionHandler” as the last choice. It only can select from map defined by “choices.cca-handler”. The elements “cca.cca-url”, “cca.username”, “cca.password” are used for initialization. For example, here it select “choices.cca-handler[Siebel]”. And it sets “cca-url” as “http://HOST:PORT/eai_enu/start.swe”.
- The element “choices.cca-handler” defines one implement class's full name of interface “com.inquirarequest.cca.CCASolutionHandler”. It is mentioned by “cca.handler”. For example, here it defines the class name as “com.inquirarequest.cca .CCASiebelHandler”. The key is “Siebel”.

In admin.jsp page, click menu “Call Center Advisor” in left, and click link “Edit”. The following screen is displayed:

The screenshot displays a configuration page for the Call Center Advisor. It features several fields and lists:

- cca-default-handler**: A dropdown menu with "ABC" selected and an "Edit List" link.
- Call Center Advisor**: A dropdown menu with "Siebel" selected.
- Base URL**: A text field containing "http://HOST:PORT/eai_enu/start.swe".
- User Name**: A text field containing "sadmin".
- Password**: A text field with masked characters (dots).
- Call Center Advisor List**: A list with two entries: "ABC" and "DEF". Each entry has copy and delete icons.
- cca-handler-impl**: A dropdown menu with "Siebel" selected and an "Add New Item" link.

- Select list “cca-default-handler” is corresponding to entry “cca.defaultHandler”.
- Select list “Call Center Advisor” is corresponding to entry “cca.handler”.
- Map “Call Center Advisor” is corresponding to map “cca.definedHandler”.
- Map “cca-handler-impl” is corresponding to map “cca.handlerImpl”.
- Text fields “Base URL”, “User Name” and “Password” are corresponding to entries “cca.cca-url”, “cca.username”, “cca.password”.

Click link “Add New Item” in map “Call Center Advisor.”

- Select list “Call Center Advisor” is corresponding to entry “CCASolutionHandler.class”.
- Text fields “Base URL”, “User Name”, “Password” are corresponding to entries “CCASolutionHandler.cca-url”, “CCASolutionHandler.username”, “CCASolutionHandler.password”. “Properties” is corresponding to entry “CCASolutionHandler.properties”.

Scenario 4: Unlink a Document from a Case

If a user determines that a solution or document linked to a case does not resolve the case and should be unlinked, then the user can unlink the document. This request is sent through InQira in order to unlink the document from the case, and unlink the case from the document if the document was an Information Manager document.

Configuration for Scenario 4

The ability to unlink documents is provided with the CCA page to view a document. A user clicks on the document from within the CRM application and an unlink option is provided.

In addition, the unlink function can be enabled as a button to be invoked from the CRM application.

Siebel Example for Scenario 4

- Define script code for event “BusComp_PreDeleteRecord” in the business component “InQira Answers” to send HTTP request to InQira with the document and case information when an InQira Answers record is deleted. Save it in file “InQira Project.sif..”
- In the Profile Configuration applet described in [Defining the Enterprise Profile on page 54](#), enter a new record with the following parameters:

Parameter	Value
Profile	HTTP_unlink
Alias	HTTP_unlink
Subsystem Type	HTTPSubSys

- save, then select the new Profile Configuration record.
- in the Profile Parameters applet, specify the following parameters:

Parameter	Value
HTTPMaxIdleSeconds	12000
HTTPRequestMethod	GET
HTTPRequestURLTemplate	http://InqiraHost:port/inquirawb/ cca.jsp?\$PARAMS

The “InQira Project.sif.” has already been created and is available for you to import into Siebel. To see the results:

- Import the “InQira Project.sif” file, as described in *Importing Contact Center Advisor Integration (SIF) Files* on page 34.
- In the Siebel tool, compile the “InQira” project and deploy the repository in Siebel, as described in *Compiling the Siebel Repository* on page 40 and *Deploying the Updated Repository in the Siebel Environment* on page 41.
- You can do unlink operation by deleting the InQira Answers record in the InQira Solutions tab described above.
- On the InQira side, you can configure the “CCASiebelHandler.java” file to call an IM web service to unbind the case from the current document deleted if the document is of type IM, otherwise do nothing.
- The InQira Answers record is then deleted and the document is unbound from the current selected case.

Chapter 3 Deploying the Contact Center Advisor in a Siebel Environment

The Contact Center Advisor contains various integration files that you import into the Siebel repository and configure within the Siebel environment. You use the Siebel Tools application to import the following integration files:

- Inqira Project.sif
- S_SRV_REQ_XM.sif
- Service Request BO.sif
- Service Request Detail Applet.sif
- Service Request Screen.sif
- Siebel Universal Agent.sif

located in::

<InQira_home>\archive\siebel\cca

and:

- S_SRV_REQ.sif
- Service Request.sif
- Inqira Project.sif

located in:

<InQira_home>\archive\siebel\common

To import the Contact Center Advisor integration files:

- Ensure that your environment is prepared for the import process as described in [Preparing for the Import Process on page 32](#)
- Log onto the Siebel Tools application as described in [Accessing the Siebel Tools Application on page 33](#)

- Set the repository into which you want to install the Siebel Repository Configuration as the current repository
- Select a project to import the Contact Center Advisor SIF files into, as described in [Selecting the Project for the Import Process on page 33](#)
- Import the integration files as described in [Importing Contact Center Advisor Integration \(SIF\) Files on page 34](#)

IMPORTANT: This chapter describes the import process using the integration file InQuira Project as an example. You must repeat the import process for each integration file.

Once you have imported the Contact Center Advisor SIF files into the selected project, you complete the deployment process by:

- Deploying the InQuira Search Applet template as described in [Deploying the InQuira Search Applet Template on page 39](#)
- Compiling the Siebel repository as described in [Compiling the Siebel Repository on page 40](#)
- Deploying the updated repository as described in [Deploying the Updated Repository in the Siebel Environment on page 41](#)

Preparing for the Import Process

To prepare for the import process, ensure that the following prerequisites are met in your environment:

- The browser script compilation must specify the correct location for your Siebel application

NOTE: For more information on browser scripting, consult the Siebel product documentation as described in Siebel Resources

- There are no existing projects having the names of the SIF files that you will import in this process
- The appropriate Siebel repository is set as the current repository

IMPORTANT: If a project of the same name as one of the Contact Center Advisor integration files currently exists, you must lock it to ensure that the import process can resolve any object definition conflicts.

Accessing the Siebel Tools Application

To access the Siebel Tools application:

- Log onto the Siebel Tools application as a user with administrator privileges, and specify server connection, as in the following example:

Login Parameter	Value
User ID:	<siebel_admin_ID>
Password:	<siebel_password>
Connect:	Server



Selecting the Project for the Import Process

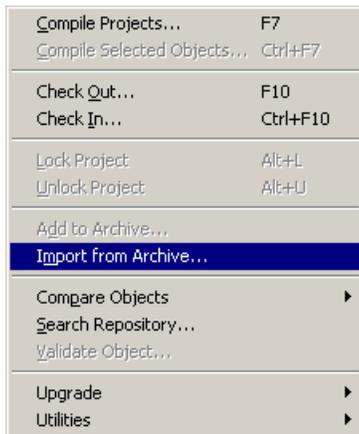
The import process will prompt you to specify the project into which you will import the Contact Center Advisor Siebel Integration Files (SIFs). You can import the integration files into an existing project, or create a new project. In the examples that follow, we will use an example project named InQuira CCA.

Importing Contact Center Advisor Integration (SIF) Files

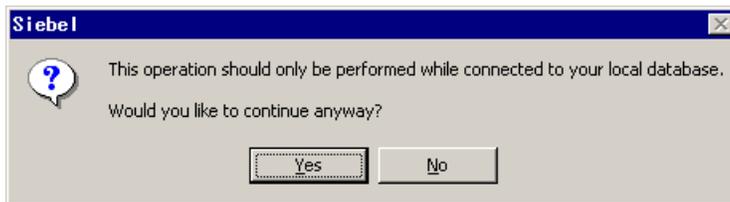
You import the Contact Center Advisor integration (SIF) files into the Siebel environment using the Siebel Tools application.

To import the InQuira project:

- In the Siebel Tools application, select **Import from Archive** from the **Tools** menu

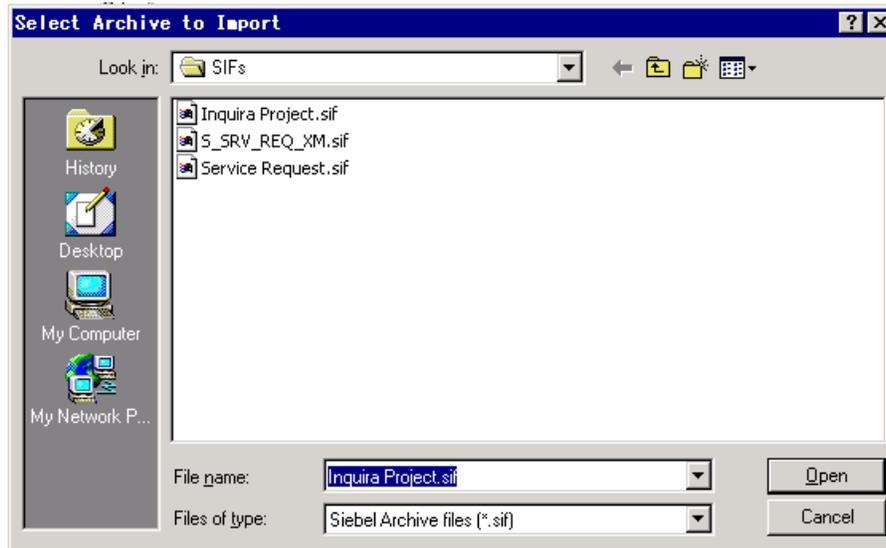


You may see the following message:



- Select **Yes** to continue

Siebel Tools displays the **Select Archive to Import** dialog:



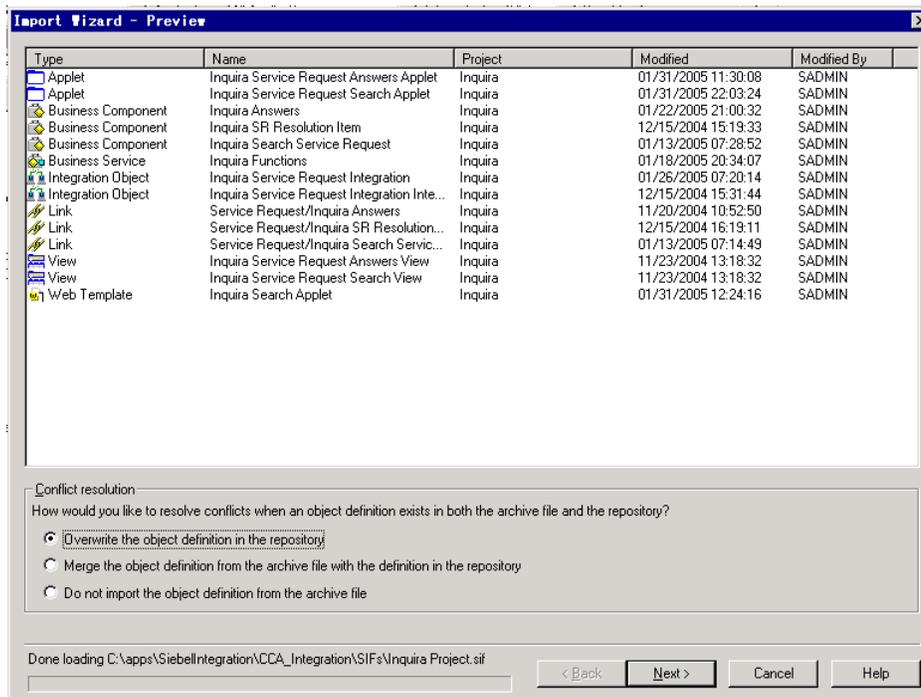
- Use the file browser to navigate to the directory <InQura_home>/archive/siebel/common
- Select the first integration file in the list, **Inqura Project.sif**

Siebel Tools displays the Import Wizard.

Specifying the Conflict Resolution Method for the Import Process

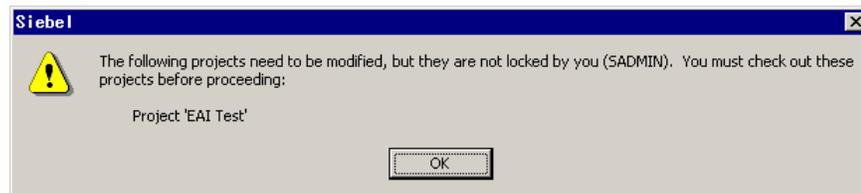
The Siebel Tools Import Wizard displays a preview screen that:

- Lists the objects in the selected archive
- Prompts you to specify conflict resolution method for any objects that currently exist in the repository



- Select the option to overwrite object definitions that exist in the repository
- Select **Next >** to continue

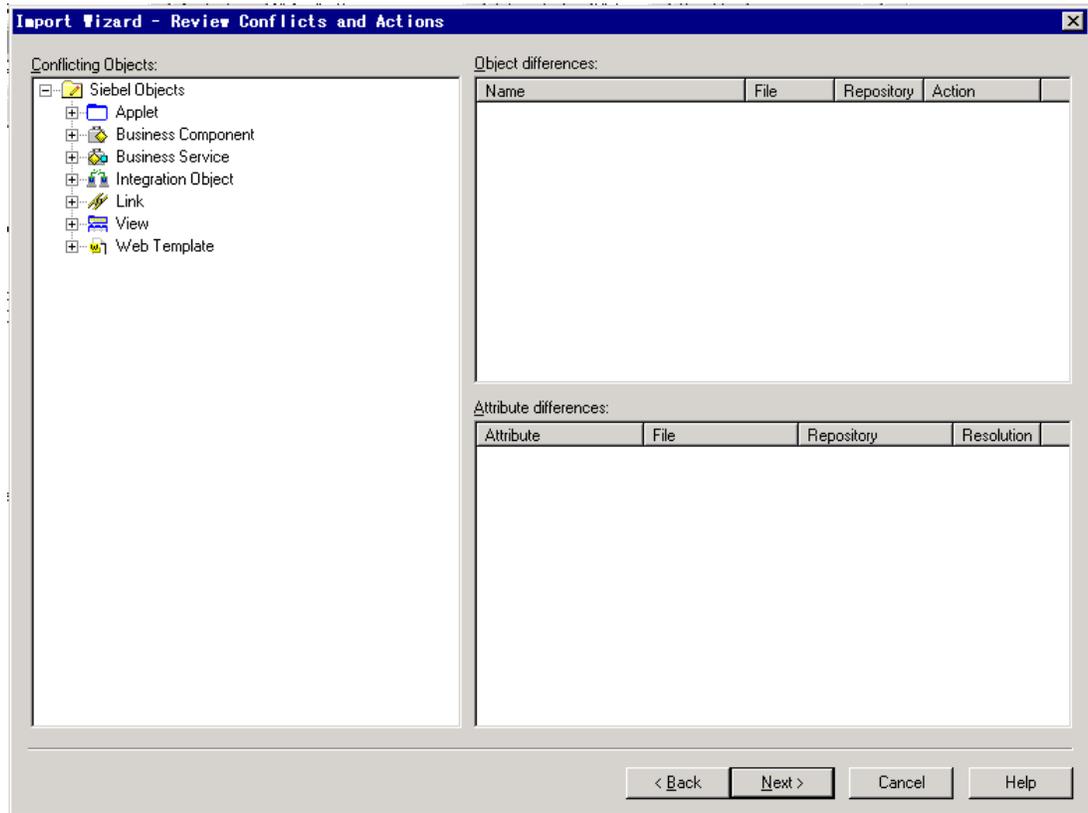
Note: You may see a message similar to the following:



- Lock any projects listed, and continue the import process

Reviewing Conflicts

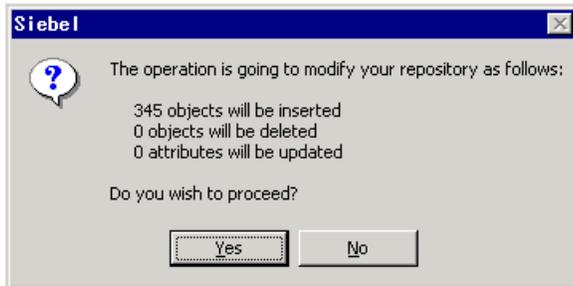
The Import Wizard lists any object definition conflicts between the project to be imported and an existing project of the same name if it exists.



- Select **Next >** to continue

Confirming the Import

The Import Wizard displays a summary message that details the updates to the repository that will occur in the import process.

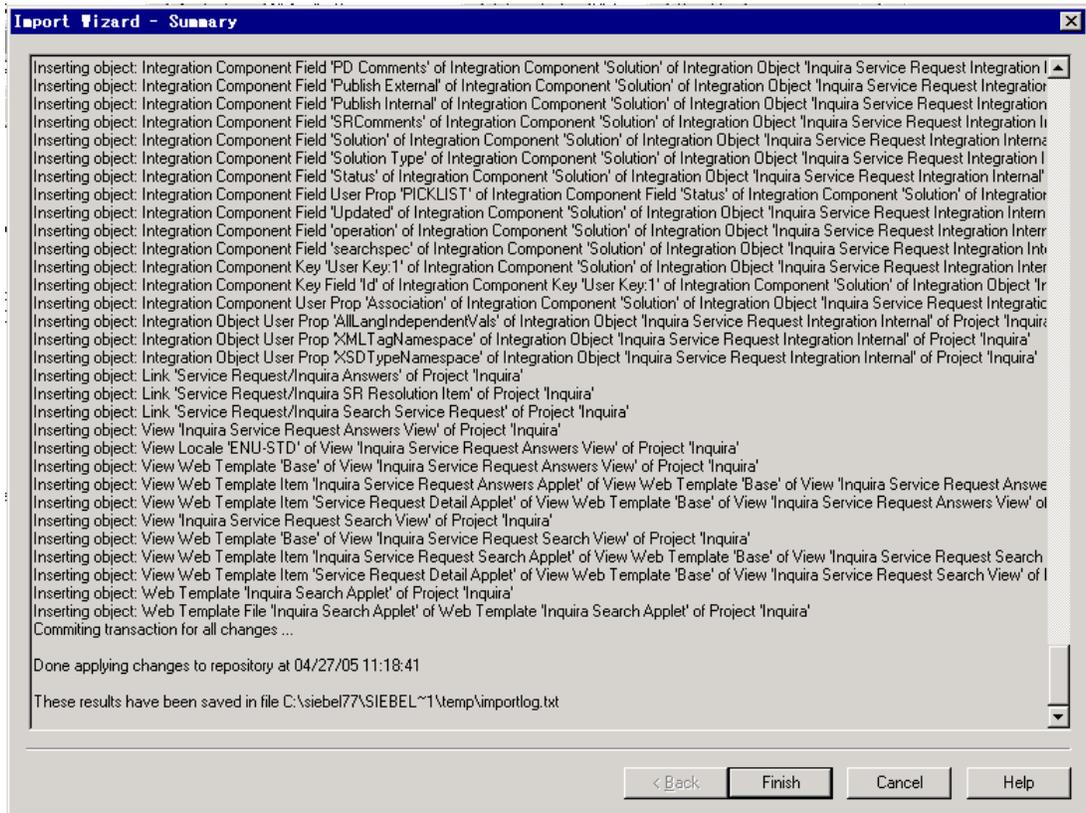


- Select **Yes** to continue

The Import Wizard displays the Summary screen.

Viewing the Import Summary

The Summary screen displays messages that detail the import process, concluding with a completion message.



- Select **Finish**, and verify the import process results

Deploying the InQuira Search Applet Template

You deploy the Contact Center Advisor search applet template by copying it from the installation location into the Siebel instance web template folder.

To deploy the applet template:

- Copy the file `InQuiraSearchApplet.swt` from:
`<InQuira_home>\archive\siebel\cca\templates`
to
- `<Siebel_home>\siebsrvr\WEBTEMPL`

Compiling the Siebel Repository

You must compile the Siebel repository (SRF) to make the configuration available to the Siebel client application. We suggest that you select the option to compile all projects.

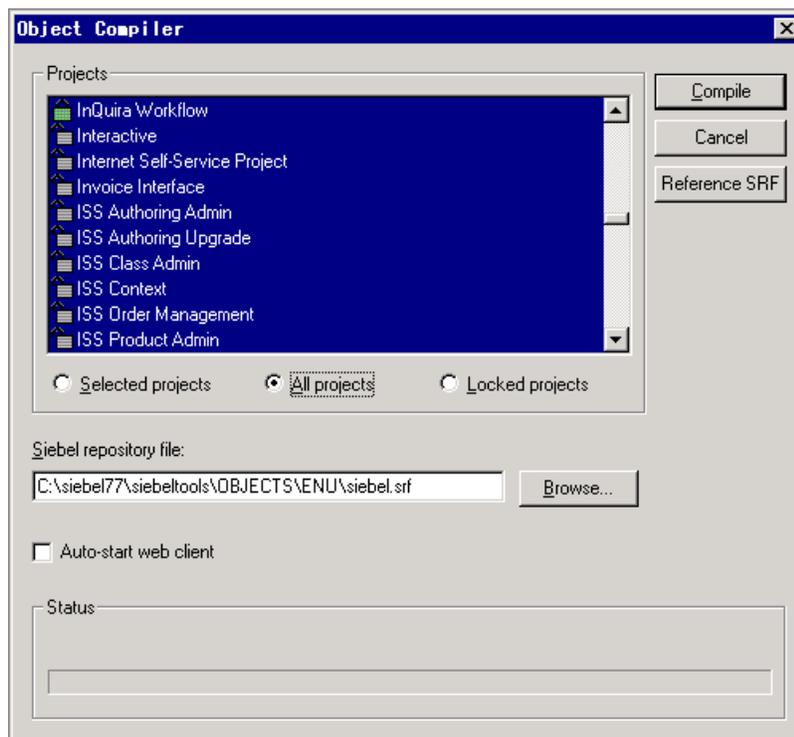
IMPORTANT: Stop the Siebel server service and the Siebel gateway service prior to compiling the repository.

To compile the Siebel repository:

- Select **Compile Projects** from the **Tools** menu



- Select **All projects** from the **Object Compiler** project selection screen



- Select **Compile**

NOTE: You can copy the compiled SRF from the server to the client application.

Deploying the Updated Repository in the Siebel Environment

Deploy the SRF in destination environment.

NOTE: This updated SRF must be present in the environment where subsequent setup changes will be made.

Chapter 4 Configuring Content Integration

The Contact Center Advisor uses the Siebel Portal Framework to perform content integration for the Contact Center Advisor. You enable the Siebel application to display InQuira 8.1 content by creating and configuring a Siebel Portal Agent.

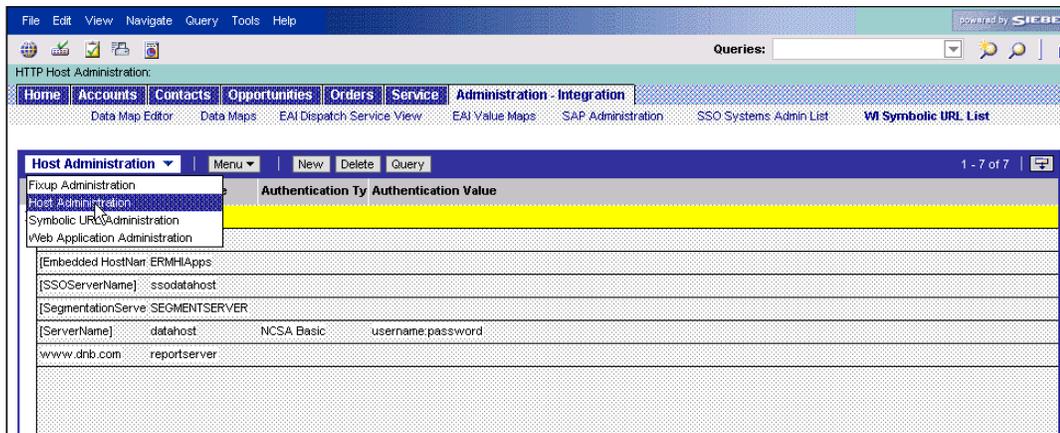
You create and configure a Portal Agent by:

- defining the external host as described in [Defining the External Host on page 44](#)
- defining the web application as described in [Defining the Web Application on page 45](#)
- defining a symbolic URL as described in [Defining a Symbolic URL on page 46](#)
- defining application views as described in [Defining Application Views on page 48](#)
- defining responsibility as described in [Defining Responsibility on page 49](#) s

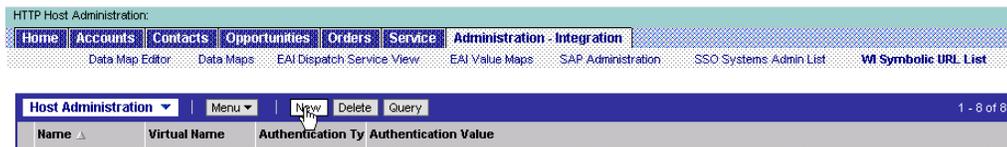
Defining the External Host

To define an external content host:

- in Siebel Tools, navigate to the **Site Map > Administration - Integration > WI Symbolic URL List > Host Administration** view



- select **New** to create a new record



The field for the new record displays:



- enter the following parameters for the new record:

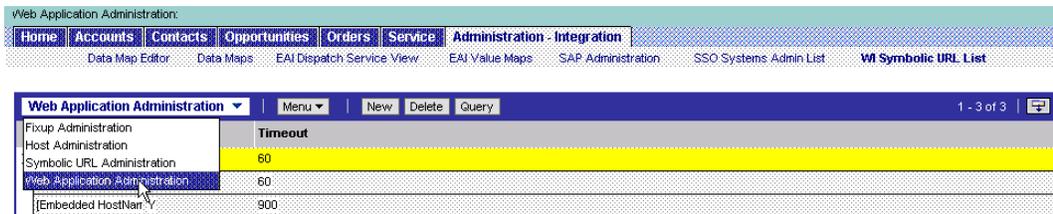
Parameter	Value
Name	<hostname>
Virtual Name	InquireHost
Authentication Type	(blank)
Authentication Value	(blank)



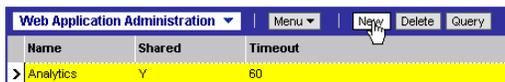
Defining the Web Application

To define a web application

- in Siebel Tools, navigate to the **Site Map > Administration - Integration > WI Symbolic URL List > Web Application Administration** view



- select **New** to create a new record



The field for the new record displays.

- define a new record, using the following parameters:

Parameter	Value
Name	Inqira
Shared	Y
Timeout	(blank)



Defining a Symbolic URL

To define a Symbolic URL:

- In Siebel Tools, navigate to the **Site Map > Administration - Integration > WI Symbolic URL List > Symbolic URL Administration** view

	Host Name	Fixup Name	Multivalue Treatr
Fixup Administration			
Host Administration			
Symbolic URL Administration	jeCon [ServerName]	Default	Comma Separated
Web Applications Administration	jeCon [ServerName]	Default	Comma Separated
AccountProfile	http://datahost/eCon [ServerName]	Default	Comma Separated
AccountStockDetail	http://datahost/eCon [ServerName]	Default	Comma Separated
AccountSubsidiaries	http://datahost/eCon [ServerName]	Default	Comma Separated

- In the top applet, enter a new record and define the following parameters:

Parameter	Value
Name	InquireSRSearchPage
URL	http://InquireHost:8080/htmlagent/cca.jsp
Hostname	<hostname>
Fixup Name	Default
Multivalue Treatment	Comma Separated
SSO Disposition	IFrame
Web Application Name	Inquire

Name	URL	Host Name	Fixup Name	Multivalue Treatr	SSO Disposition	Web Application Name
InquireSRSearchPage	http://InquireHost:80	Inquire	Default	Comma Separated	IFrame	Inquire

- In the Symbolic URL Arguments applet, enter the following argument records:

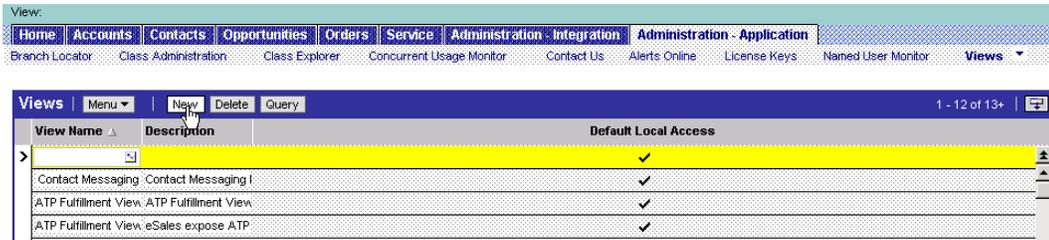
Name	Required Arg	Arg Type	Arg Value	Appended as Arg	Substitute in Text	Sequence #
sr_key	N	Field	SR Number	Y	N	1
question_box	N	Field	Abstract	Y	N	2
cca_types	N	Constant	solution_id, resolution_id	Y	N	3
solution_id	N	Field	Inqira Solution Id	Y	N	4
ext_sol	N	Field	Inqira Answers Name	Y	N	5
resolution_id	N	Field	Inqira SR Resolution Id	Y	N	6
ui_mode	N	Profile Attribute	Inqira Button Navigation	Y	N	7
cca_connected	N	Constant	true	Y	N	8
IFRAME	Y	Command	IFRAME Height=400 Width=100% Frameborder=0 marginwidth=1 marginheight=1	Y	N	9
PostRequest	Y	Command	PostRequest	Y	N	10
cca_system	Y	Constant	Siebel	Y	N	11
cca_case_desc	Y	Field	Abstract	Y	N	12

Name	Required Arg	Argument Type	Argument Value	Appended as Arg	Substitute in Text	Sequence #
PostRequest	Y	Command	PostRequest	✓		10
IFRAME	Y	Command	IFRAME Height=400	✓		9
cca_connected	N	Constant	true	✓		8
ui_mode	N	Profile Attribute	InqiraButtonNaviga	✓		7
resolution_id	N	Field	Inqira SR Resolutio	✓		6
ext_sol	N	Field	Inqira Answers Na	✓		5
solution_id	N	Field	Inqira Solution Id	✓		4
cca_types	N	Constant	solution_id,resolutio	✓		3
question_box	N	Field	Abstract	✓		2
sr_key	N	Field	SR Number	✓		1

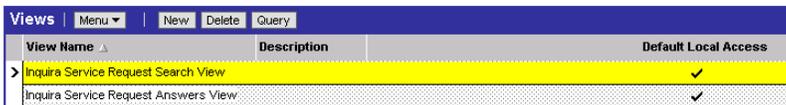
Defining Application Views

To define Application Views

- In Siebel Tools, navigate to **Site Map > Administration – Application > Views**
- In the top applet, enter new records and define the following parameters



Parameter	Value
View Name	Inquira Service Request Answers View
Description	(optional)
Default Local Access	Y
Parameter	Value
View Name	Inquira Service Request Search View
Description	(optional)
Default Local Access	Y

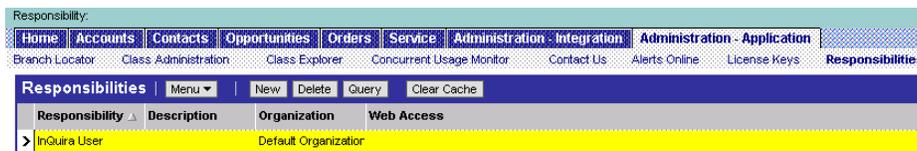


Defining Responsibility

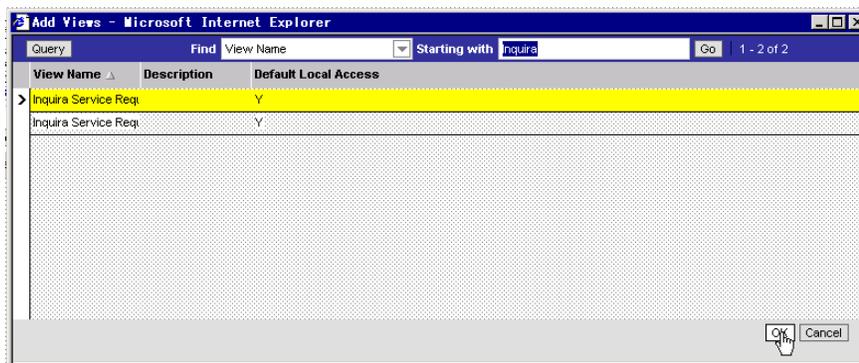
To define Responsibility:

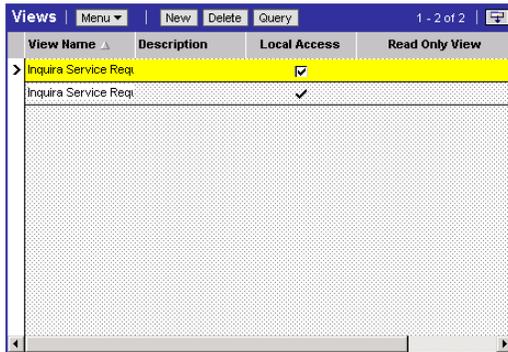
- navigate to **Site Map > Administration – Application > Responsibilities > Views**
- add the views:
 - **Inqira Service Request Answers View**
 - **Inqira Service Request Search View**
- navigate to **Site Map > Administration – Application > Responsibilities > Add Responsibilities**
- in the Responsibilities applet, enter a new record and specify the following parameters:

Parameter	Value
Responsibility	Inqira User
Description	(optional)
Organization	Default Organization
Web Access	(optional)

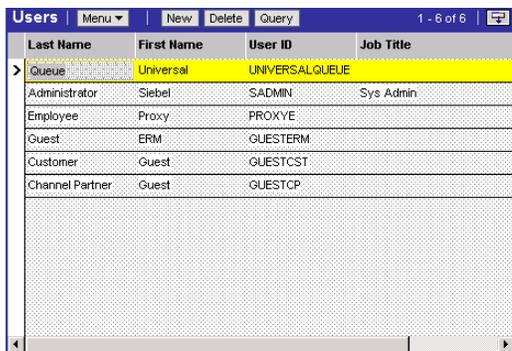
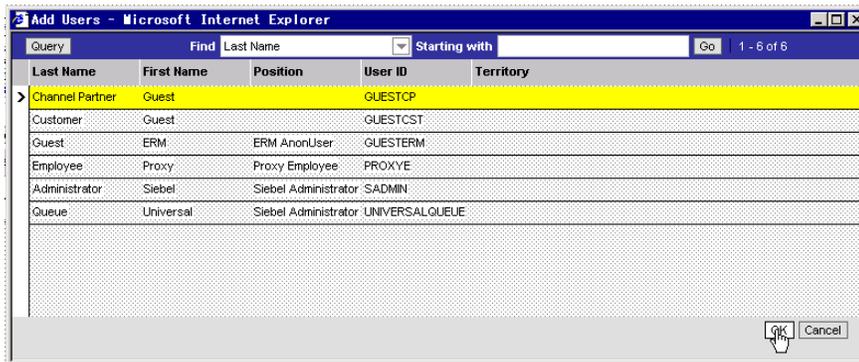


- In the Views applet, add the two views from the list of candidates:





- In the Users applet, enter new records by selecting users from popup applet that should have access to the above created responsibility.



Chapter 5 Configuring Data Integration

The Contact Center Advisor uses the Siebel EAI Framework for data integration between the InQira 8.1 and Siebel applications. This HTTP request-response based integration uses Siebel as a service. The inbound EAI request invokes a workflow in Siebel to insert and update data, and uses the Siebel Data Mapping Service to transform data between the InQira XML format and Siebel's internal format.

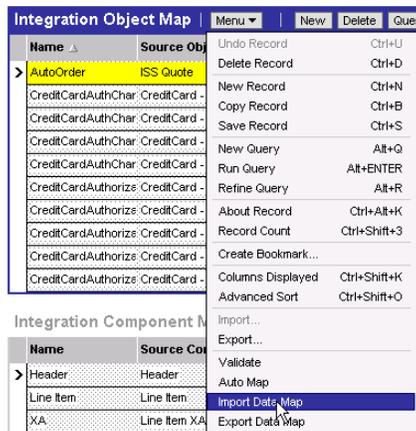
You configure data integration by:

- importing the data map as described in [Importing the Data Map on page 52](#)
- defining the HTTP Service as described in [Defining the HTTP Service on page 53](#)
- defining the Enterprise Profile as described in [Defining the Enterprise Profile on page 54](#)

Importing the Data Map

To import the Data Map:

- navigate to **Site Map > Administration - Integration > Data Map Editor**
- in the Integration Object Map applet, select **Import Data Map**



The EAI Import dialog displays:



- locate the data map
(`<InQuira_home>\archive\siebel\cca\datamapper\InQuiraServiceRequest.XML`) and select **Import**.

Defining the HTTP Service

To define the HTTP Service, you must edit the Enterprise Application Integration (EAI) configuration file for the Siebel server.

NOTE: There is an additional Enterprise Application Integration (EAI) configuration file for the Siebel client application. Do not edit the client application EAI configuration.

To edit the EAI configuration file:

- locate the configuration file, eai.cfg, in the Siebel server directory, for example:
<Siebel_server_home>/siebsrvr/BIN/ENU/eai.cfg
- edit the [HTTP Services] section of the configuration file by adding the following statement:

```
Inquire = InquireDispatch
```

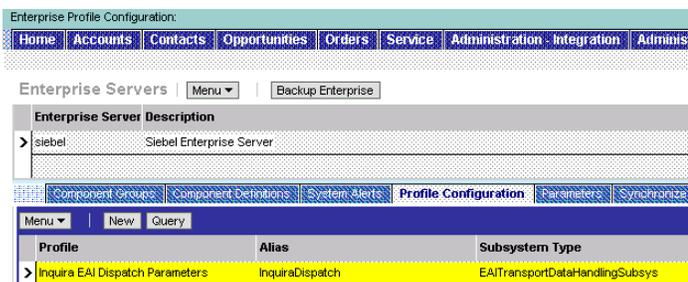
IMPORTANT: Ensure that there is no [Workflow] sub-section in the [HTTP Services] section.

Defining the Enterprise Profile

To define the Enterprise Profile Configuration:

- navigate to **Site Map > Administration - Server Configuration > Enterprises > Profile Configuration** within the Siebel Tools application
- in the Profile Configuration applet, enter a new record with the following parameters:

Parameter	Value
Profile	Inquire EAI Dispatch Parameters
Alias	InquireDispatch
Subsystem Type	EAITransportDataHandlingSubsys
Description	(optional)



- save, then select the new Profile Configuration record
- in the Profile Parameters applet, specify the following parameters:

Parameter	Value
Parameter	Workflow Process to Execute
Alias	DispatchWorkflowProcess
Value	Inquire HTTP Inbound

Parameter	Alias	Data Type	Value	Description
Character Set Conversion for Text	CharSetConversion	String	None	Character Set conversion from external system
Converter Service	ConverterService	String		Business Service used to serialize/unserialize hierarchical data to raw buffer and vice versa
Service Method to Execute	DispatchMethod	String		Name of method for dispatch service to call
Dispatch Service Rule Set	DispatchRuleSet	String		Name of Dispatch Service rule set to dispatch received message to
Service to Execute	DispatchService	String		Name of service to dispatch received message to
Workflow Process to Execute	DispatchWorkflowProcess	String	Inquire HTTP Inbound	Name of workflow process to dispatch received message to
Ignore Character Set Conversion Errors	IgnoreCharSetConvErrors	Boolean	False	Ignore character set conversion errors if 'true'. Else, propagate the errors to the caller
Impersonate	Impersonate	Boolean	False	Perform Impersonation
Rollback transport Transaction on C.RollbackOnDispatchError	RollbackOnDispatchError	Boolean	True	Rollback transport transaction if the Dispatch Method fails.
Nest Siebel Transactions in Transport	SiebelTransactions	Boolean	True	Nest Siebel transactions within transactions in transport. (This does NOT guarantee two

Chapter 6 Configuring the Contact Center Advisor Integrated User Interface

You can configure the height of the search results frame within the Siebel application as described in this chapter.

Adjusting the IFrame Height

The IFrame feature is used to display InQuira 8.1 content within the Siebel application. The height of IFrame determines the height of Siebel applet used to render the InQuira 8.1 content.

- edit the `Height` parameter of the `IFRAME` argument as specified in [Defining a Symbolic URL on page 46](#). The default Contact Center Advisor value is:

`IFRAME Height=400...`

- change the value of the `Height` parameter to the desired value
- update the Siebel application

