



# Oracle Knowledge iConnect for Siebel Contact Center Integration Guide

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*Using iConnect to Integrate Siebel CRM and Oracle Knowledge Applications*

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# About This Guide

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

This preface includes information on:

- “In This Guide” - The general organization of this guide.
- “Screen and Text Representations”
- “References to Web Content”
- “Examples of Product Screens and Text”

## In This Guide

The Oracle Knowledge iConnect for Siebel Contact Center Integration Guide is divided into the following sections:

*Chapter 1, Oracle Knowledge iConnect for Siebel Contact Center*

This chapter describes Oracle Knowledge iConnect for Siebel Contact Center installation, installed directories and files, product components, and the integration process.

*Chapter 2, Deploying iConnect in a Siebel Environment*

This chapter describes how to import and deploy the iConnect components into the Siebel environment using Siebel Tools.

*Chapter 3, Configuring Content Integration*

This chapter describes how to configure the iConnect components that make Oracle Knowledge application available to the Siebel application.

*Chapter 4, Configuring Data Integration*

This chapter describes how to configure the data transfer between the Oracle Knowledge application and the Siebel application.

*Chapter 5, Configuring the iConnect Integrated User Interface*

This chapter describes how to adjust the height of the search results frame within the Siebel application.

*Appendix A, Deploying Intelligent Search for Siebel*

This appendix discusses the Content Converter Style Sheet, the Runtime Event, and the Web Services.

*Appendix B, Configuring Oracle Knowledge Content Processing*

This appendix discusses the Siebel Content Acquisition and Presentation and provides information on configuring a Siebel crawler.

## Screen and Text Representations

The product screens, screen text, and file contents depicted in the documentation are examples. This guide attempts to convey the product's appearance and functionality as accurately as possible. Application screen content is compared for overall accuracy with screen shots in the guide prior to release. Updates are made where necessary. However, the actual product contents and displays might differ from the published examples.

## References to Web Content

For your convenience, this guide refers 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.

## Examples of Product Screens and Text

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.

## Operating System Variations in Examples and Procedures

We generally use Linux screen displays and naming conventions in our examples and procedures. We include other operating system-specific procedures or steps as noted in section headings, or within topics, as appropriate.

We present command syntax, program output, and screen displays:

- in Linux format first
- in other Unix-specific variants only when necessary for proper operation or to clarify functional differences
- in Windows format only when necessary for clarity

# Oracle Knowledge iConnect for Siebel Contact Center

The Oracle Knowledge iConnect for Siebel Contact Center provides a complete intelligent search interface that enables contact center agents to quickly and easily find accurate answers to customer inquiries from within their Siebel dashboard.

iConnect for Siebel Contact Center leverages Oracle Knowledge'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 Oracle Knowledge technology can automatically incorporate customer context, call context, and CRM contextual information in the search for answers to customer inquiries.

iConnect for Siebel Contact Center 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 intent.

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

## Integration Requirements and Supported Applications

The following table lists the requirements and supported applications for the iConnect for Siebel Contact Center for Oracle Knowledge integration:

Oracle Knowledge Requirements	Supported Siebel Products
<p>The following Oracle Knowledge products are required:</p> <ul style="list-style-type: none"> <li>Complete and configured Oracle Knowledge 8.5, or higher, installation</li> <li>iConnect for Siebel Contact Center 8.5</li> </ul>	<p>One of the following supported Siebel products:</p> <ul style="list-style-type: none"> <li>Siebel Call Center 7.8</li> <li>Siebel Call Center 8.1</li> <li>Siebel Call Center 8.2.2</li> </ul>

Siebel integration with Oracle Knowledge requires a complete and configured Oracle Knowledge installation, as well as the installed and deployed iConnect for Siebel Contact Center software components.

You must access Siebel Tools to import the Siebel Import Files (.sif) containing the Oracle Knowledge-supplied Siebel components, including the Project and Workflow for content access integration, as well as integration Applets and associated Business Components used for application user interface integration.

See the *Oracle Knowledge Platform and Language Requirements* for complete information on supported platforms and databases. The document is available at:

<http://www.oracle.com/technetwork/indexes/documentation/knowledge-documentation-1506742.html#href=Integration/The%20Information%20Manager%20Tag%20Library.19.164.html&single=true>

## Terminology

Throughout this guide, the following terms are used:

Term	Description
Siebel Import File (SIF)	Refers specifically to the files imported into the Siebel application to activate an integration with another application and have the .sif file extension. <b>Note:</b> Oracle Knowledge provides a different version of the .sif file for Siebel 7.8, Siebel 7.8.2, and Siebel 8.x.
Siebel Repository File (SRF)	Refers specifically to the files used by the Siebel repository and have the .srf file extension.
integration files	Refers collectively to all of the necessary files to implement the iConnect for Siebel application in the Siebel CRM environment.

## The Integration Process

iConnect for Siebel Contact Center integration requires a complete and configured Oracle Knowledge installation, as well as a supported Siebel CRM application installation.

You need access to Siebel Tools to import the Siebel Import files (.sif) containing the Oracle Knowledge-supplied Siebel components.

The iConnect for Siebel Contact Center deployment process consists of the following steps:

- Deploy the iConnect for Siebel Contact Center components in the Siebel environment as described in [Chapter 2, Deploying iConnect in a Siebel Environment](#)
- Configure content integration as described in [Chapter 3, Configuring Content Integration](#)
- Configure data integration as described in [Chapter 4, Configuring Data Integration](#)
- Edit the Siebel user interface as described in [Chapter 5, Configuring the iConnect Integrated User Interface](#)

## iConnect for Siebel Contact Center Installation Directories

The iConnect for Siebel Contact Center installation creates the following directory structure in Windows:

Siebel 7.8	Siebel 8.1 and 8.2
\CCA \DataMaps \SIF \WebService \WebTemplate \Workflows \Wsd1 <sup>1</sup> \CRAWLER \DataMaps \RunTimeEvents \SIF \WebService \Workflows <sup>1</sup> \Wsd1 <sup>1</sup>	\CCA \DataMaps \SIF \WebService \WebTemplate \Wsd1 <sup>1</sup> \CRAWLER \DataMaps \RunTimeEvents \SIF \WebService \Wsd1 <sup>1</sup>



The following tables describe the installation directories and files for iConnect for Siebel Contact Center.

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

Directory	Description
<b>CCA</b>	This directory contains the iConnect for Siebel Contact Center components.
<b>CRAWLER</b>	This directory contains the iConnect for Siebel Contact Center crawler components. See Appendix B, "Configuring Oracle Knowledge Content Processing," for more information on the Siebel crawler.

The `CCA` directory contains the following iConnect for Siebel Contact Center directories and files:

Directory	Description
<b>DataMaps</b>	This directory contains two files which are used in the data integration process:  InQuiraLinkUnlinkSRDM.XML InQuiraSRLinkedAnswersDM.XML
<b>SIF<sup>1</sup></b>	This directory contains the Siebel Import File for the iConnect for Siebel Contact Center:  InQuiraProject.sif  You import this file into the Siebel environment during the deployment process.
<b>WebService</b>	This directory contains the webservices file:  InQuiraSRLinkedAnswers.XML
<b>WebTemplate</b>	This directory contains the Oracle Knowledge search applet, <code>InQuiraSearchApplet.swt</code> , for deployment in the Siebel environment.
<b>Workflows</b>	The directory contains the workflows which must be imported into Siebel 7.8:  InQuiraGetSRLinkedAnswers InQuiraLinkUnlinkAdapter
<b>WsdL</b>	This directory contains the WSDL (Web Services Description Language) files which must be imported into Siebel 7.8 to link answers.  InQuiraSR_Linked_Answers.WSDL InQuiraSRLinkedAnswers_InQuira SR Linked Answers.WSDL.xml

1. Oracle Knowledge provides a different version of the .sif file for Siebel 7.8, Siebel 7.8.2, and Siebel 8.x.

The `CRAWLER` directory contains the following iConnect for Siebel Contact Center files:

File	Description
<b>DataMaps</b>	This directory contains the datamap file: <code>InQuiraSRDetails.XML</code>
<b>RunTimeEvents</b>	This directory contains the runtime event file: <code>RTE.xml</code>
<b>SIF<sup>1</sup></b>	This directory contains the Siebel Integration File, which is imported into the Siebel environment during the deployment process:  InQuiraCrawlerProject.sif
<b>WebService</b>	This directory contains the webservices file:  InQuiraCrawler.XML

<b>Workflow</b>	<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 Oracle Knowledge Siebel crawlers.</p> <p>The following workflow processes are for Siebel 7.8:</p> <pre> InQuiraCleanUpTransCrawlRecord InQuiraCrawlerFullGet InQuiraCrawlerGetSRDetails InQuiraCrawlerPartialGe InQuiraInsertTransCrawlRecord InQuiraMainTransCrawlRecord </pre>
<b>Wsd</b>	<p>This directory contains the WSDL (Web Services Description Language) files that must be imported into Siebel 7.8 to use the crawler.</p> <pre> SiebelInQuira_Crawler.WSDL SiebelInQuira_InQuiraCrawler.WSDL.xml </pre>

1. Oracle Knowledge provides a different version of the .sif file for Siebel 7.8, Siebel 7.8.2, and Siebel 8.x.

## iConnect for Siebel Contact Center Components

iConnect for Siebel Contact Center consists of the following components that you deploy within the Siebel CRM environment:

- Custom Siebel Projects packaged as Siebel Import Files (.sif) that you import and deploy as described in [Chapter 2, Deploying iConnect in a Siebel Environment](#)
- Custom user interface templates (InQuiraSearchApplet.swt) as described in “Deploying the Oracle Knowledge Search Applet Template” on page 15

# Deploying iConnect in a Siebel Environment

iConnect for Siebel Contact Center 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:

Integration File	Location
InQuiraProject.sif	<InQuira_home>\archive\siebel\CCA\SIF
InQuiraLinkUnlinkSRDM.xml	<InQuira_home>\archive\siebel\CCA\Datamaps
InQuiraSRLinkedAnswersDM.xml	<InQuira_home>\archive\siebel\CCA\Datamaps
InQuiraSearchApplet.swt	<InQuira_home>\archive\siebel\CCA\WebTemplate
InQuiraSRLinkedAnswers.xml	<InQuira_home>\archive\siebel\CCA\WebService
InQuiraGetSRLinkedAnswers	<InQuira_home>\archive\siebel\CCA\Workflows
InQuiraLinkUnlinkAdapter	<InQuira_home>\archive\siebel\CCA\Workflows

**Note:** To deploy iConnect in Siebel 7.8, you must first import the following additional workflows:

- InQuiraCleanUpTransCrawlRecord
- InQuiraCrawlerFullGet
- InQuiraCrawlerGetSRDetails
- InQuiraCrawlerPartialGe
- InQuiraInsertTransCrawlRecord
- InQuiraMainTransCrawlRecord

To import the iConnect for Siebel Contact Center integration files:

- Ensure that your environment is prepared for the import process as described in “Preparing for the Import Process” on page 8.
- Log onto the Siebel Tools application as described in “Accessing the Siebel Tools Application” on page 8.
- Set the repository into which you want to install the Siebel Repository Configuration as the current repository.
- Select a project to import the iConnect for Siebel Contact Center SIF files into, as described in “Selecting the Project for the Import Process” on page 9.
- Import the integration files as described in “Importing iConnect for Siebel Contact Center Integration Files” on page 9 and “Importing the Crawler Integration Files” on page 14.

**Important!** This chapter describes the import process using the integration file Oracle Knowledge Project as an example. You must repeat the import process for each integration file.

After you have imported the iConnect for Siebel Contact Center SIF files into the selected project, you complete the deployment process by:

- Modifying the Service Request business component (BC) within Siebel Tools as described in “Modifying the Business Component (Service Request)” on page 14.
- Deploying the Oracle Knowledge Search Applet template as described in “Deploying the Oracle Knowledge Search Applet Template” on page 15.
- Activate the table in Siebel as described in “Activating the Table in Siebel” on page 15.
- Compiling the Siebel repository as described in “Compiling the Siebel Repository” on page 17.
- Deploying the updated repository as described in “Deploying the Updated Repository in the Siebel Environment” on page 25.

## Preparing for the Import Process

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

- 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 iConnect for Siebel Contact Center integration files currently exists, you must lock it to ensure that the import process can resolve any object definition conflicts.

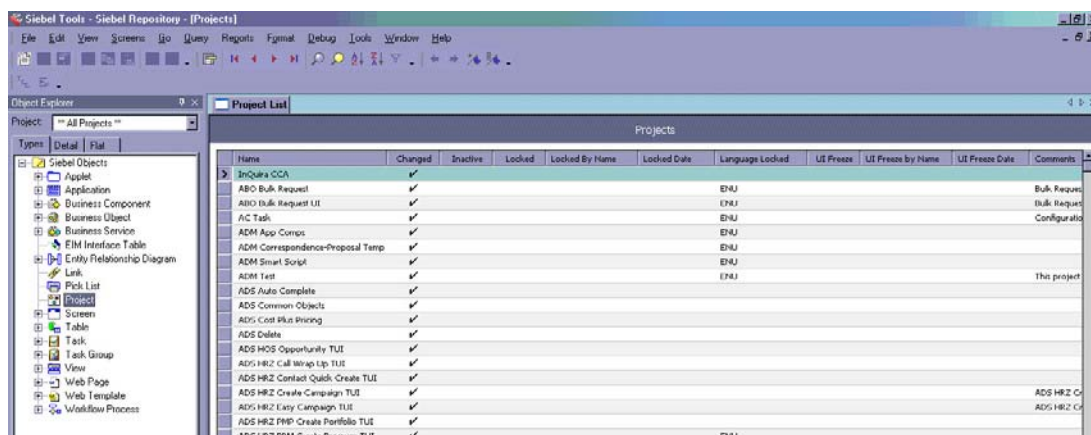
## Accessing the Siebel Tools Application

To access the Siebel Tools application, log onto the Siebel Tools application as a user with administrator privileges, and specify the 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 prompts you to specify the project into which you will import the iConnect integration files. You can import the integration files into an existing project, or create a new project. In the examples that follow, we use an example project named InQuira CCA.



## Importing iConnect for Siebel Contact Center Integration Files

**Important!** The following section applies to Siebel versions 8.1.1.5 and 8.2.2. If you are using a Siebel implementation later than version 8.1.1.5, except version 8.2.2, you can skip this step and proceed to “Modifying the Business Component (Service Request)” on page 14.

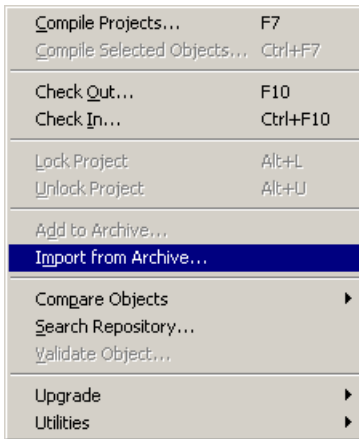
This section describes how to import iConnect Siebel integration files into the Siebel environment and discusses:

- **Specifying the Conflict Resolution Method for the Import Process**
- **Reviewing Conflicts**
- **Confirming the Import**
- **Viewing the Import Summary**

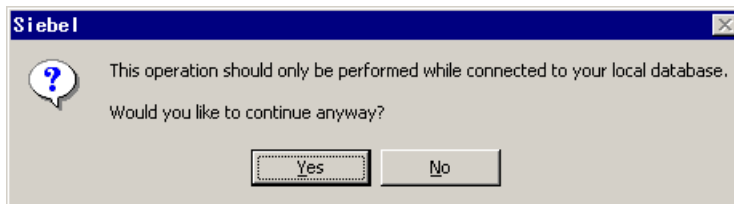
You import the iConnect for Siebel Contact Center integration (.sif) files into the Siebel environment using the Siebel Tools application.

To import the Oracle Knowledge project:

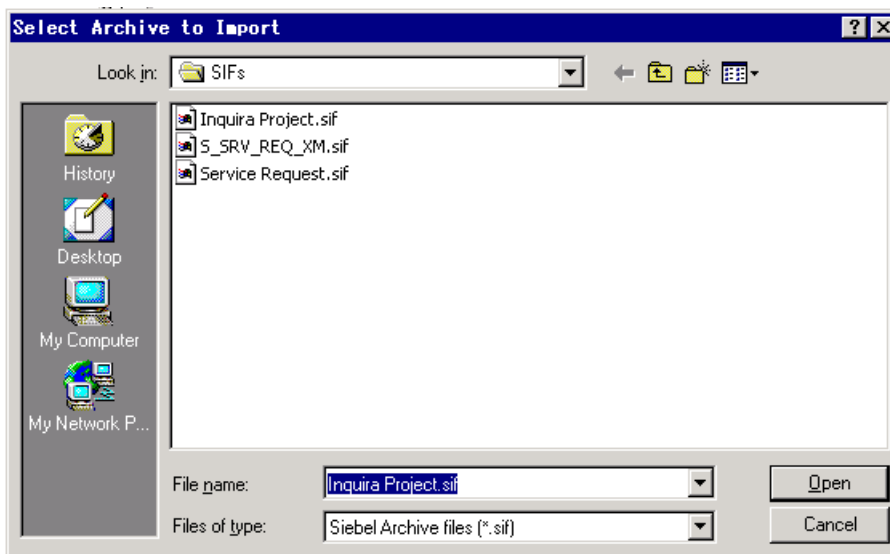
- 1 In the Siebel Tools application, select **Import from Archive** from the **Tools** menu:



You may see the following message:



- 2 Click **Yes** to continue.  
Siebel Tools displays the **Select Archive to Import** dialog:



- 3 In the file browser, navigate to the following directory:  
<InQura\_home>\archive\siebel\CCA\SIF

**Note:** Oracle Knowledge provides a different version of the .sif file for Siebel 7.8, Siebel 7.8.2, and Siebel 8.x .

- 4 Select the first integration file in the list, **InQuiraProject.sif**.

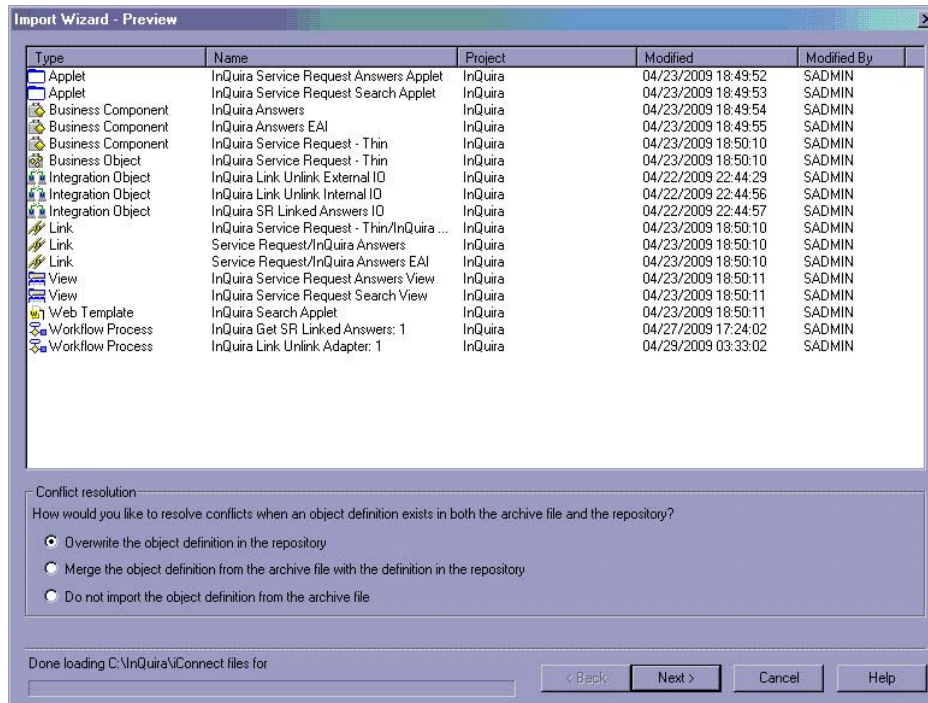
- 5 Click **Open**.

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:

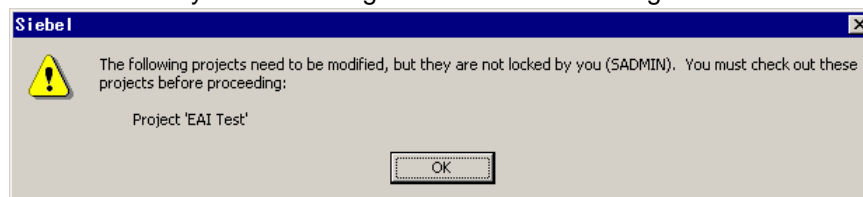
- Lists the objects in the selected archive
- Prompts you to specify conflict resolution method for any objects that currently exist in the repository



To specify the Conflict Resolution Method:

- 1 Select **Overwrite the object definition in the repository**.
- 2 Click **Next >** to continue.

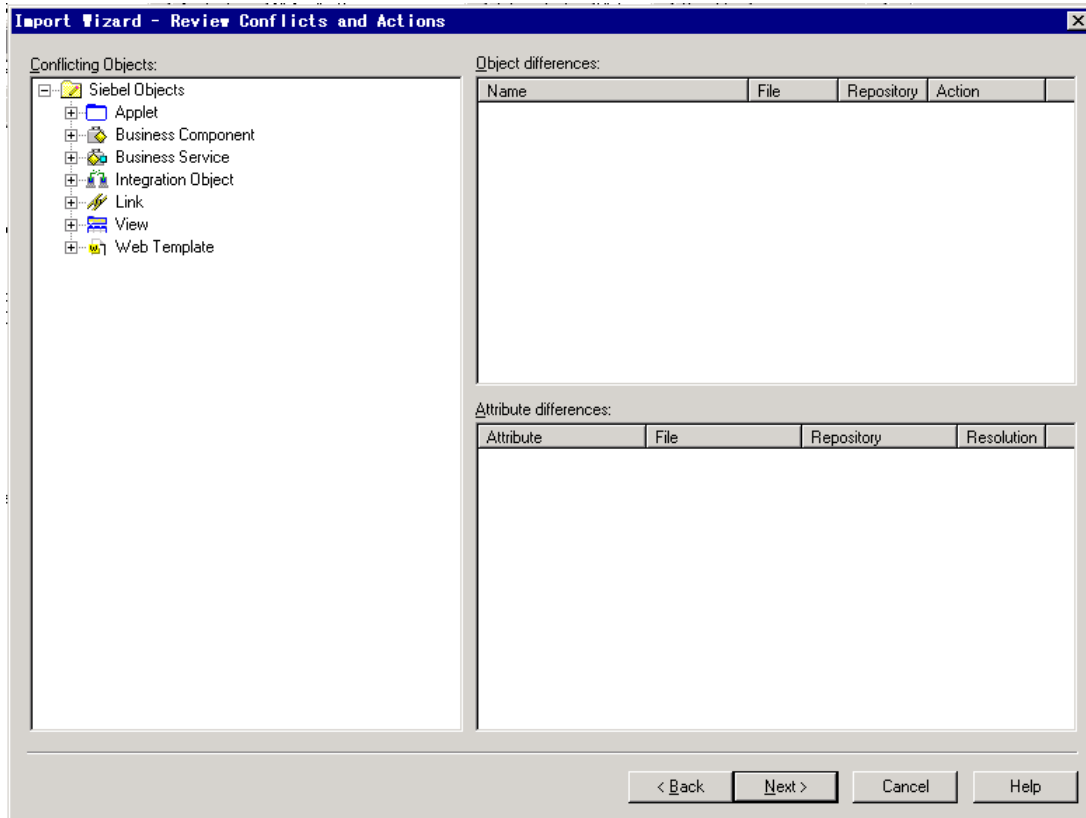
**Note:** You may see a message similar to the following:



- 3 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.



Click **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.



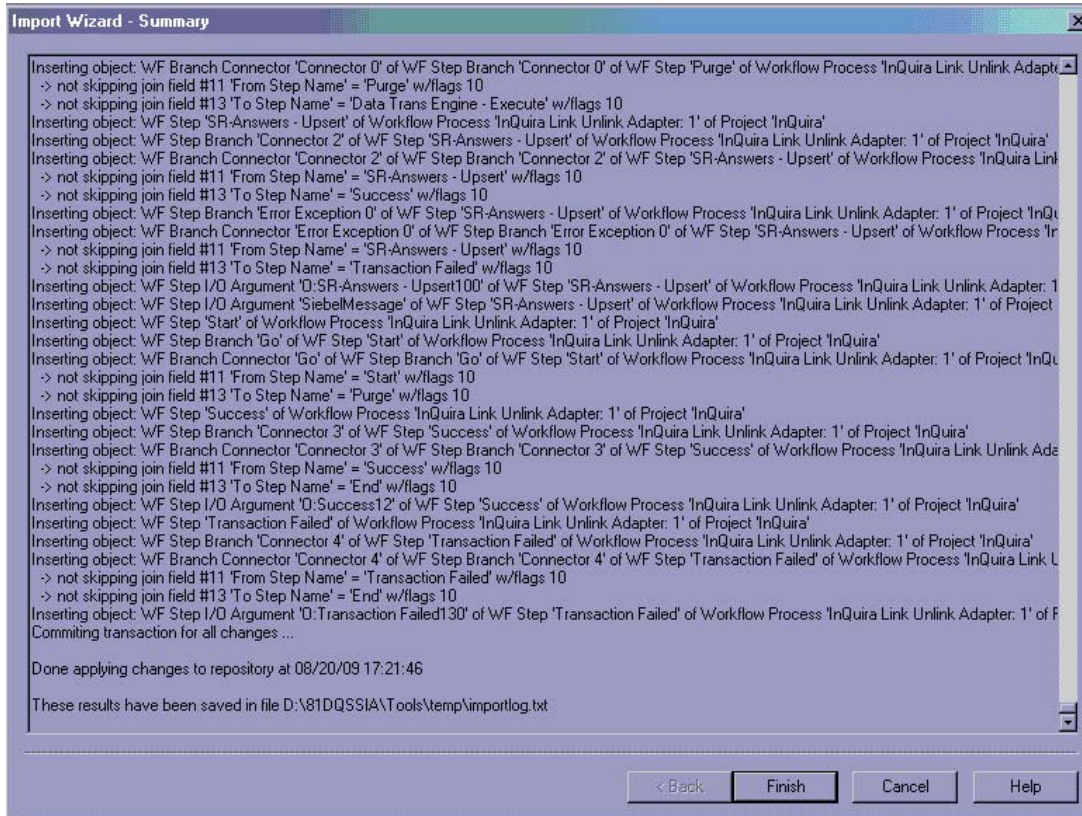
Click **Yes** to continue. The Import Wizard displays the Summary screen.

**Note:** The figure above is an example. Repository modification results vary depending on the iConnect version and configuration specifics of a given installation.



## Viewing the Import Summary

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

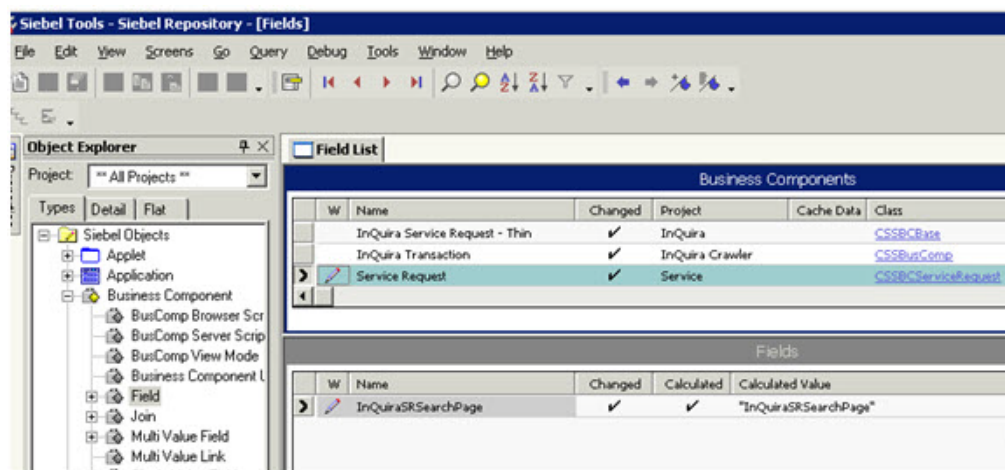


Click **Finish**, and verify the import process results.

**Note:** If the import fails for some reason, please take a screen capture of the error and escalate the issue to Oracle Knowledge.

## Modifying the Business Component (Service Request)

The Service Request business component (BC) within Siebel Tools must be modified to include the following calculated fields with the properties set as below.



To create 'InQuiraSRSearchPage' field within Service Request BC:

- 1 Log into Siebel Tools and select 'Business Component' within Object Explorer
- 2 Query for 'Service Request' business component. Lock the object by right clicking on Service Request BC and selecting 'Lock Object' from the pop-up menu, if the Service Request BC is not locked.
- 3 Select 'Field' object to display the list of fields.
- 4 Create a new field by right clicking in the fields list and selecting 'New' from the pop-up menu.
- 5 Set following properties for the field:

Property	Value
Name	InQuiraSRSearchPage
Calculated	Yes (select the check box)
Calculated Value	"InQuiraSRSearchPage"
Type	DTYPE_TEXT

## Importing the Crawler Integration Files

Repeat the process described in "Importing iConnect for Siebel Contact Center Integration Files" on page 9 to import the InQuiraCrawlerProject.sif file, stored in the following location:

```
<InQuira_home>\archive\siebel\CRAWLER\SIF
```

**Note:** Oracle Knowledge provides different versions of the .sif file for Siebel 7.8, Siebel 7.8.2, and Siebel 8.x.

## Deploying the Oracle Knowledge Search Applet Template

You deploy the iConnect for Siebel Contact Center 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\WebTemplate`

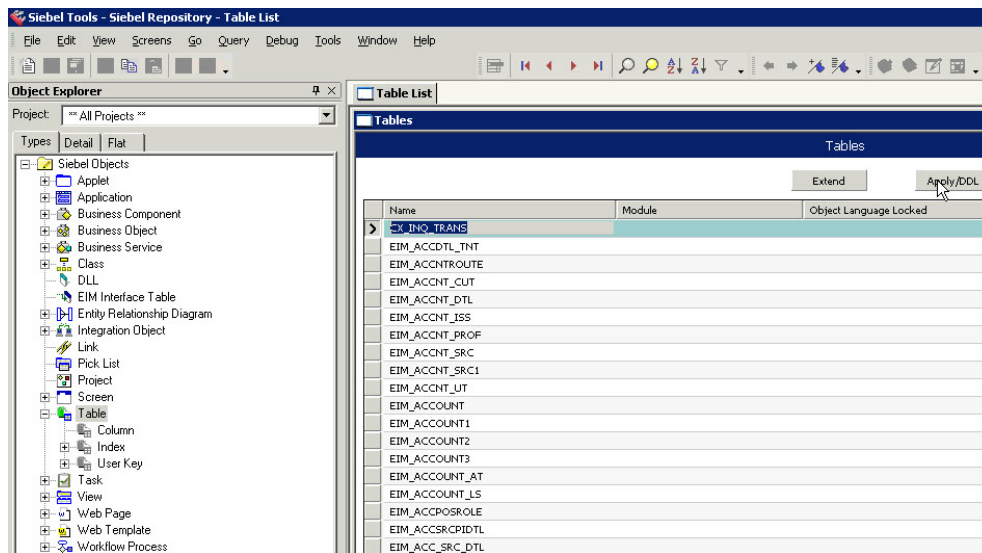
to

`<Siebel_home>\siebsrvr\WEBTEMPL`

## Activating the Table in Siebel

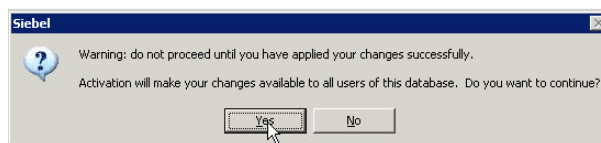
To activate the table in Siebel:

- 1 Access Siebel Tools - Siebel Repository - Table List
- 2 Select the CX\_INQ\_TRANS table from the list.

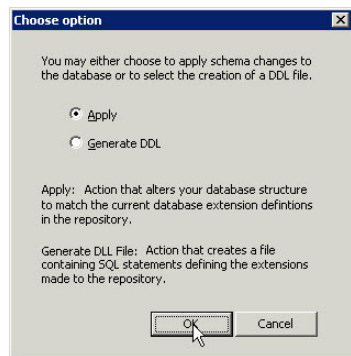


- 3 Click **Apply/DDL**.

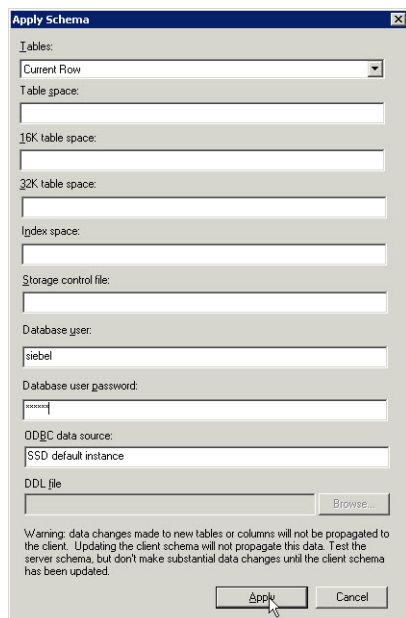
If you receive a warning like the one below, click **Yes**.



- 4 In the Choose Option dialog box, select **Apply** and click **OK**.



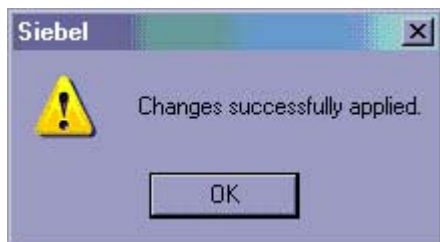
The Apply Schema window displays.



5 Enter the Database user and Database user password in Apply Schema.

6 Click **Apply**.

Siebel Tools applies the table and provides a *Changes successfully applied* notification when complete.



7 Click **OK** in the Siebel notification.

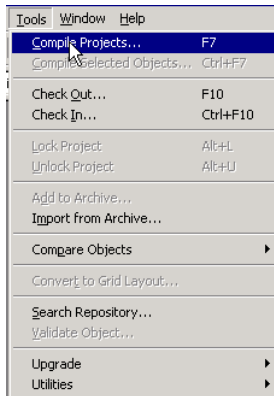
## Compiling the Siebel Repository

You must compile the Siebel Repository File (SRF or file extension .srf) to make the configuration available to the Siebel client application. We suggest that you select the option to compile all projects.

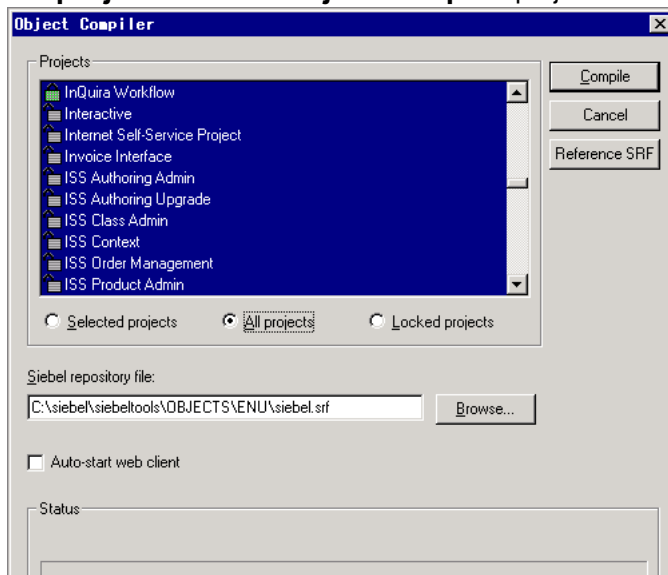
**Important!** Stop the Siebel server and the Siebel gateway services prior to compiling the repository.

To compile the Siebel repository:

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



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



- 3 Click **Compile**.

**Note:** Compile time varies depending on the size of the repository and server characteristics. Compile may take between 5-30 minutes. After the compile is complete, you must copy the compiled SRF file to the appropriate location on the Siebel Server, as described in step 4, below.

**Important!** If compile errors out, please note the error, abort the configuration process, and escalate the issue to a Siebel admin/Oracle Knowledge Consultant.

- 4 After a successful compile, copy the compiled SRF to both the server and the client application.

- a Unlock the locked project on the server.

- b Copy the `siebel.srf` file to the following location on the Siebel server:

`<SIEBEL_HOME>\siebsrvr\objects\enu`

Use the following location for the client:

`<SIEBEL_HOME>\client\objects\enu`

It is recommended that you rename the current `siebel.srf` in the `<SIEBEL_HOME>/siebsrvr/objects/enu` directory to `siebel.srf.old<date&time>`.

**Important!** For **Siebel Industry Applications**, you must also replace the `siebel_sia.srf` file in the same directory, with the compiled `siebel.srf` file. In this case, you will have two files with the same compiled SRF content but with different names. It is recommended that you rename the current `siebel_sia.srf` to `siebel_sia.srf.old<date&time>`.

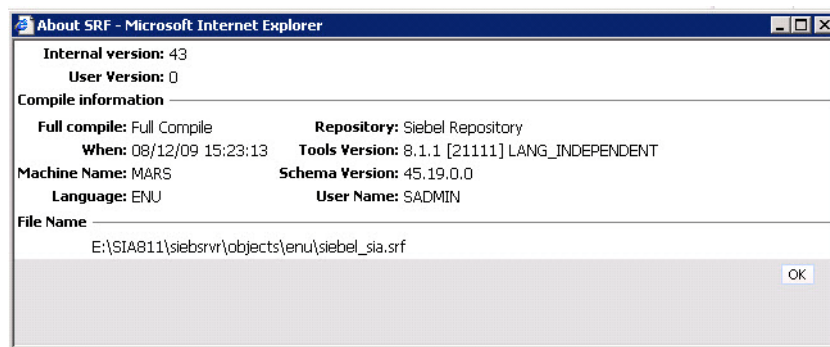
## Ascertaining Siebel Applications Type

You can ascertain the Siebel application type by either of the following methods:

Finding from the Siebel Application:

- 1 In the Siebel application, click on Help in the Menu bar.
- 2 Select **About SRF...** from the dropdown menu.

A pop-up window appears as shown below. Note the file name in the pop-up window. If the file name is `siebel_sia.srf`, then the application is a Siebel Industry Application and you must copy the compiled SRF over `siebel_sia.srf` as well.



Finding from the Siebel Tools Application:

- 1 In the Siebel Tools application, click on Help in the Menu bar.
- 2 Select **About SRF...** from the dropdown menu.

A pop-up window appears as shown below. Note the file name in the pop-up window. If the file name is `siebel_sia.srf`, then the application is Siebel Industry Application and you need to copy the compiled SRF over `siebel_sia.srf` as well.



## Importing Workflows in the Siebel Environment

**Important!** This section applies only to customers who are integrating Oracle Knowledge iConnect for Siebel 7.8 Contact Center. If you are integrating Oracle Knowledge iConnect for either Siebel version 8.1 or Siebel version 8.2, please go to the next section titled “Deploying Workflows in the Siebel Environment”.

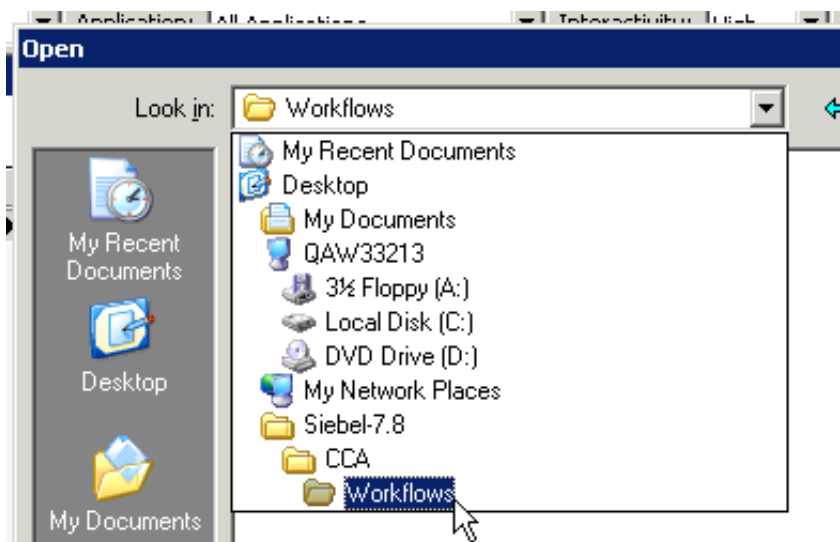
- 1 Select **Workflow Process** in the object explorer within Siebel Tools.
- 2 In the object list editor where all workflow processes are listed, right-click and select **Import Workflow Process**.



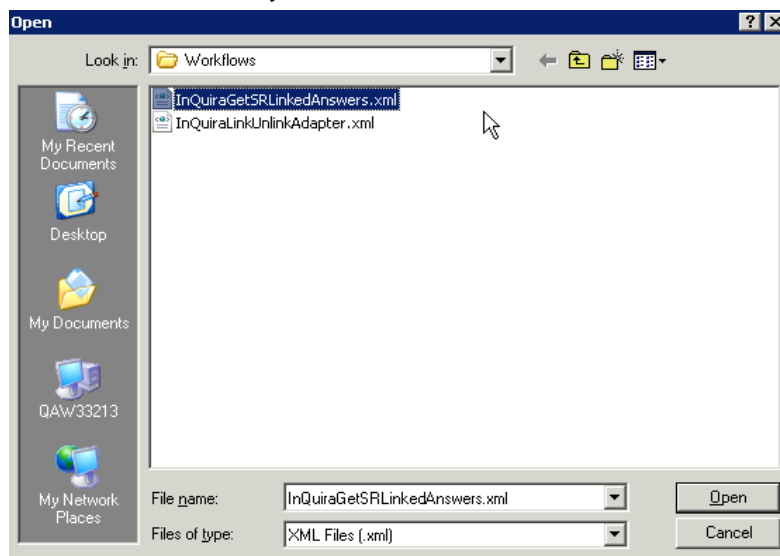




- 3 Navigate to the directory where you have extracted the iConnect files.

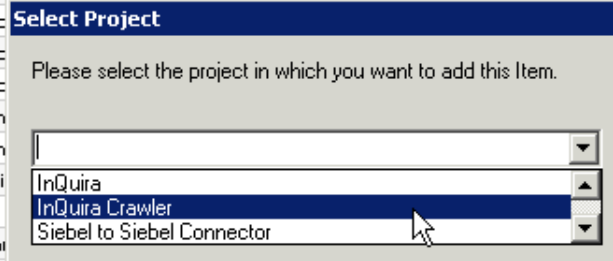


- 4 Navigate to the **Workflow** directory under the **CCA** folder. Select the workflow process for import from the **Workflow** directory and click **OK**.



- 5 Select a project to import the workflow into when prompted next and click **OK** to import the workflow process.

Process Name	Auto Persist	Status
ISS Approval (Agreement)	NO	Completed
ISS Approval (Order)	NO	Completed
ISS Approval (Quote)	NO	Completed
ISS Post Approval Wc		Completed
ISS Post Approval Wc		Completed
ISS Post Approval Wc		Completed
ISS Promotion Agree		Completed
ISS Promotion Agree		Completed
ISS Promotion Commi		Completed
ISS Promotion Create		Completed
ISS Promotion Discon		Completed
ISS Promotion Disconnect Process - for Verify	NO	Completed
ISS Promotion Disconnect Process	NO	Completed



- 6 Confirm that the workflow process selected has been imported into Siebel Tools by querying for it by its name.
- 7 Confirm that the status of newly imported workflow is 'In Progress'.

Process Name	Auto Persist	Status	Workflow Mode
InQuira Get SR Linked Answers	NO	In Progress	Service Flow

- 8 Repeat steps 1 through 7 to import the rest of workflows from **Workflow** directory under the CCA folder.
- 9 Import the workflows provided in the Workflow directory under the **Crawler** folder by following steps 1 through 7.

**Important!** Import the following workflows first while importing workflows provided under Crawler directory:

- InQuira Insert Trans Crawl Record
- InQuira CleanUp Trans Crawl Record

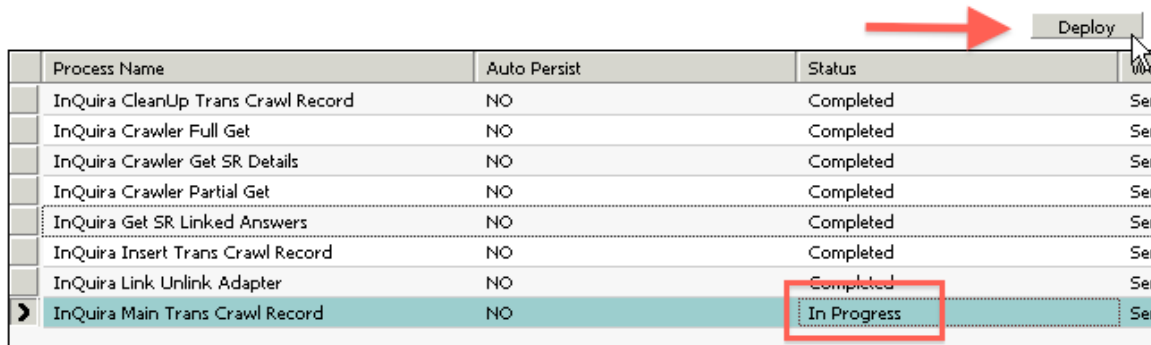
These workflows are referred as 'sub-processes', and hence should be imported before importing the other workflows to maintain the reference.

## Deploying Workflows in the Siebel Environment

This section applies to Siebel versions 7.8, 8.1, and 8.2 customers integrating Oracle Knowledge iConnect for Siebel Contact Center applications.

After importing the workflows, check that the workflow status for all is 'In Progress'.

- 1 Select a workflow in object list editor in Siebel Tools and click **Deploy**.
- 2 Notice the status of the workflow changed to *Completed*.
- 3 Repeat step 1 to deploy all imported workflows.



Process Name	Auto Persist	Status	
InQuira CleanUp Trans Crawl Record	NO	Completed	Ser
InQuira Crawler Full Get	NO	Completed	Ser
InQuira Crawler Get SR Details	NO	Completed	Ser
InQuira Crawler Partial Get	NO	Completed	Ser
InQuira Get SR Linked Answers	NO	Completed	Ser
InQuira Insert Trans Crawl Record	NO	Completed	Ser
InQuira Link Unlink Adapter	NO	Completed	Ser
InQuira Main Trans Crawl Record	NO	In Progress	Ser

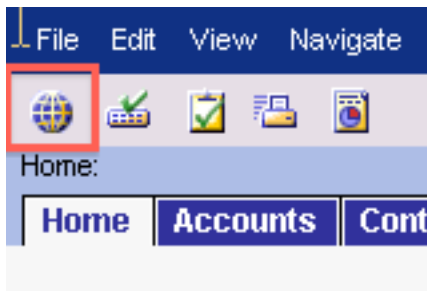
## Activating Workflows in the Siebel Environment

This section applies to Siebel version 7.8, 8.1, as well as 8.2 customers integrating Oracle Knowledge iConnect for Siebel Contact Center applications.

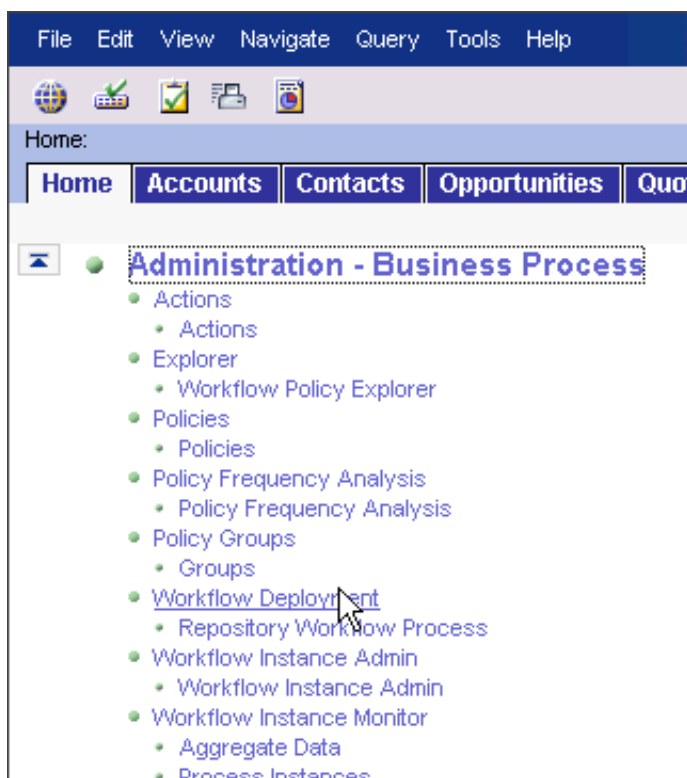
**Note:** Make certain that the Siebel server and Siebel gateway services have been restarted before logging into the Siebel application.

To activate the deployed workflows:

- 1 Log into Siebel application and navigate to **Site Map** by clicking on the Site Map icon on top left corner of the application.



- 2 Select **Administration – Business Process** from the site map and navigate to **Workflow Deployment** view.



- 3 Query for the imported workflows by using **InQuira\*** criteria.

Name	Business Object	Status	Group	Version	Mode
InQuira CleanUp Trans Crawl Record	InQuira Transaction	Completed		0	Service Flow
InQuira Crawler Full Get		Completed		0	Service Flow
InQuira Crawler Get SR Details	Service Request	Completed		0	Service Flow
InQuira Crawler Partial Get	InQuira Transaction	Completed		0	Service Flow
InQuira Get SR Linked Answers	InQuira Service Req	Completed		0	Service Flow
InQuira Insert Trans Crawl Record	InQuira Transaction	Completed		0	Service Flow
InQuira Link Unlink Adapter		Completed		0	Service Flow

Name	Version	Business Object	Group	Deployment Status	Activation Date/Time	Expiration Date/Time
------	---------	-----------------	-------	-------------------	----------------------	----------------------

- 4 Select the workflow and click the **Activate** button (highlighted above). In the **Active Workflow Processes** applet below, query and refresh the records to confirm that the deployed workflow is now **Active** by confirming the status displayed in the **Deployment Status** field.

Active Workflow Processes				
Menu ▾   Query Query Results				
Name ▲	Version	Business Object	Group	Deployment Status
> InQuira CleanUp Trans Crawl Record	0	InQuira Transaction		Active

- 5 Repeat step 4 to activate rest of the deployed workflows. Confirm the *Active* status in the **Active Workflow Processes** applet.

Active Workflow Processes				
Menu ▾   Query Query Results				
Name ▲	Version	Business Object	Group	Deployment Status
> InQuira CleanUp Trans Crawl Record	0	InQuira Transaction		Active
InQuira Crawler Full Get	0			Active
InQuira Crawler Get SR Details	0	Service Request		Active
InQuira Crawler Partial Get	0	InQuira Transaction		Active
InQuira Get SR Linked Answers	0	InQuira Service Req		Active
InQuira Insert Trans Crawl Record	0	InQuira Transaction		Active
InQuira Link Unlink Adapter	0			Active

## Deploying the Updated Repository in the Siebel Environment

Deploy the SRF in the destination environment.

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

After you successfully copy the files in the previous step, restart the Siebel gateway server. After the gateway server has started, restart the Siebel server. The Siebel server takes 2-3 minutes to start depending on the platform characteristics and the size of the repository.

# Configuring Content Integration

iConnect for Siebel Contact Center uses the Siebel Portal Framework to perform content integration for the iConnect for Siebel Contact Center. You enable the Siebel application to display Oracle Knowledge content by creating and configuring a Siebel Portal Agent.

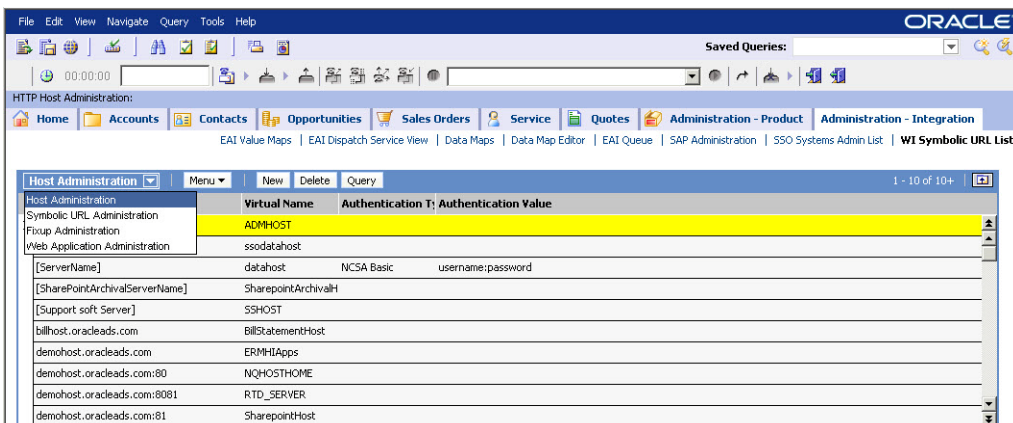
To create and configure a Portal Agent:

- Define the external host as described in “Defining the External Host” on page 27.
- Define the web application as described in “Defining the Web Application” on page 28.
- Define a symbolic URL as described in “Defining a Symbolic URL” on page 29.
- Configure the Oracle Knowledge iConnect properties in Oracle Knowledge System Manager as described in “Configuring iConnect Parameters” on page 30.
- Create the Oracle Knowledge User Responsibility as described in “Creating the Oracle Knowledge User Responsibility” on page 36.
- Define application views as described in “Defining Application Views” on page 36.

## Defining the External Host

To define an external content host:

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



- 2 Select **New** to create a new record. The field for the new record displays:



- 3 Enter the following parameters to define the new record:

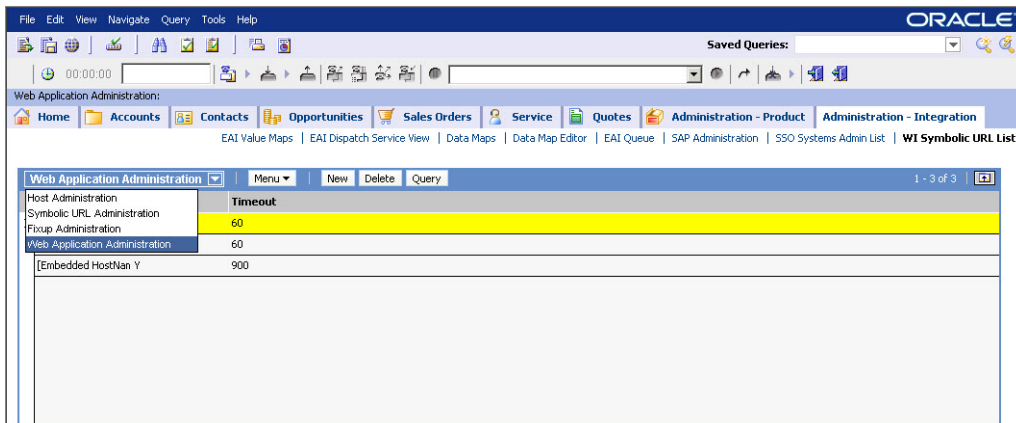
Parameter	Value
<b>Name</b>	<hostname> The name of the host machine where Oracle Knowledge is installed.
<b>Virtual Name</b>	InQuiraHost
<b>Authentication Type</b>	(blank)
<b>Authentication Value</b>	(blank)



## Defining the Web Application

To define a web application:

- 1 In the Siebel application, navigate to the **Site Map > Administration - Integration > WI Symbolic URL List > Web Application Administration** view



- 2 Select **New** to create a new record. The field for the new record displays:

Web Application Administration		
Name	Shared	Timeout
>		

- 3 Enter the following parameters to define the new record:

Parameter	Value
Name	InQuira
Shared	Y
Timeout	(blank)

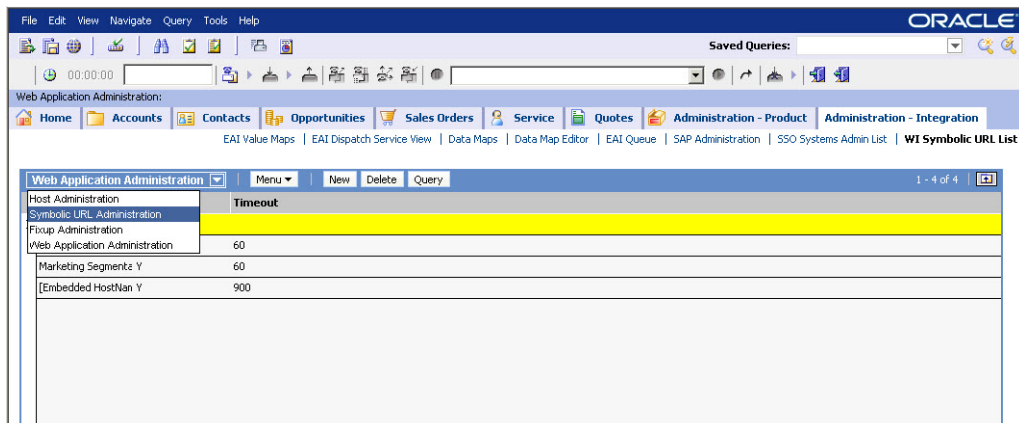
Web Application Administration		
Name	Shared	Timeout
> InQuira	<input checked="" type="checkbox"/>	



## Defining a Symbolic URL

To define a Symbolic URL:

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



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

Parameter	Value
Name	InQuiraSRSearchPage
URL	http://inquirahost:8226/<infocenter_app_name>/index
Hostname	<hostname> The name of the host machine where Oracle Knowledge is installed.
Fixup Name	Default
Multivalue Treatment	Comma Separated
Web Application Name	InQuira

Name	URL	Host Name	Fixup Name	Multivalue Treatr	SSO Disposition	Web Application Name
> InQuiraSRSearchPage	http://inquirahost:8226/infocenter_app_name/index	InQuira	Default	Comma Separated	IFrame	InQuira

- 3 For the Symbolic URL Argument List Applet enter the following arguments for **InQuiraSRSearchPage**:  
Menu > New Record > Enter

Name	Required Argument	Argument Type	Argument Value	Append as Argument	Substitute in Text	Sequence Number
page	Y	Constant	ccaMain	Y	N	1
sr_key	N	Field	SR Number	Y	N	2
question_box	N	Field	Abstract	Y	N	3
cca_types	N	Constant	solution_id, resolution_id	Y	N	4
solution_id	N	Field	InQuira Solution Id	Y	N	5
ext_sol	N	Field	InQuira Answers Name	Y	N	6
resolution_id	N	Field	InQuira SR Resolution Id	Y	N	7
ui_mode	N	Constant	Question	Y	N	8
cca_connected	N	Constant	TRUE	Y	N	9
IFRAME	Y	Command	IFRAME Height=400 Width=100% Frameborder=0 marginwidth=1 marginheight=1	Y	N	10
PostRequest	Y	Command	GetRequest	Y	N	11
cca_system	Y	Constant	Siebel	Y	N	12
cca_case_desc	Y	Field	Abstract	Y	N	13
IsRecordSensitive	N	Command	TRUE	Y	N	14
user	N	Command	UserLoginId	Y	N	15
pswd	Y	Command	UserLoginPassword	Y	N	16

Name	Required Argument	Argument Type	Argument Value	Append as Argument	Substitute in Text	Sequence #
page	✓	Constant	ccaMain	✓		1
sr_key		Field	SR Number	✓		2
question_box		Field	Abstract	✓		3
cca_types		Constant	solution_id, resolution_id	✓		4
solution_id		Field	InQuira Solution ID	✓		5
ext_sol		Field	InQuira Answers Nar	✓		6
resolution_id		Field	InQuira SR Resolutio	✓		7
ui_mode		Constant	Question	✓		8
cca_connected		Constant	TRUE	✓		9
IFRAME	✓	Command	IFRAME Height=400	✓		10

## Configuring iConnect Parameters

When you add a web application to a repository and define it, Oracle Knowledge Information Manager deploys the iConnect files and the InfoCenter files. This represents the web pages and the properties file for the web application.

Use the Contact Center Advisor setup in the Advanced Configuration Facility to set and modify the integration parameters for the iConnect and Siebel.

## Edit Call Center Advisor Settings

In Advanced Configuration:

- 1 In the Oracle Knowledge System Manager, navigate to **Tools > Advanced Config > System > Contact Center Advisor**.
- 2 Click **Edit**.

The **Editing: Call Center Advisor** screen displays:

- 3 Enter the following parameters:

Property	Description
cca-default-handler	Refers to how Oracle Knowledge communicates with Siebel installations. See “Add a Call Center Advisor” below.
Call Center Advisor	The default is Siebel. This is the “cca-handler-impl”. This must match what is defined for the “cca_system” on page 30 in the Symbolic URL Argument List.
cca-request-handler-impl	For Siebel, use the delivered class name: <code>com.inquiria.request.cca.CCASiebelHandler</code>
cca-response-handler-impl	For Siebel, use the delivered class name: <code>com.inquiria.request.cca.CCASiebelHandler</code>

## Add a Call Center Advisor

From the **Editing: Call Center Advisor** screen:

- 1 Click **Add New Item** in the Call Center Advisor section.

The **Editing: Call Center Advisor > Call Center Advisor** screen displays.

- 2 Review the “Possible Configurations” section and enter the following properties for your configuration:

Property	Description
Item Name	Name for the CCA configuration. This is used to register the CRM handler and helps the Oracle Knowledge CCA framework locate the handleImp.
cca-request-handler-impl	For Siebel, use the delivered class name: <code>com.inquiria.request.cca.CCASiebelHandler</code>
cca-response-handler-impl	For Siebel, use the delivered class name: <code>com.inquiria.request.cca.CCASiebelHandler</code>
Base URL	The URL associated with the configured Siebel system. This is used to access web services. Traditional integrations connect to the Siebel EAI Object Manager: <code>http://siebelhost:siebelport/eai_&lt;langcode&gt;/start.swe</code> . When using WSSE (Web Services Security Encryption) this is typically: <code>http://siebelhost:siebelport/eai_anon_&lt;langcode&gt;/start.swe</code> . For more information on WSSE, see “Configuring Siebel to Support WSSE”.
User Name	The user name login associated with the Siebel server.
Password	The password associated with the above user name, used to access the Siebel server.
Properties	Add any additional configurable properties, if necessary. To modify select <b>Add New Item</b> .

- 3 Click **Add New Item** under properties.

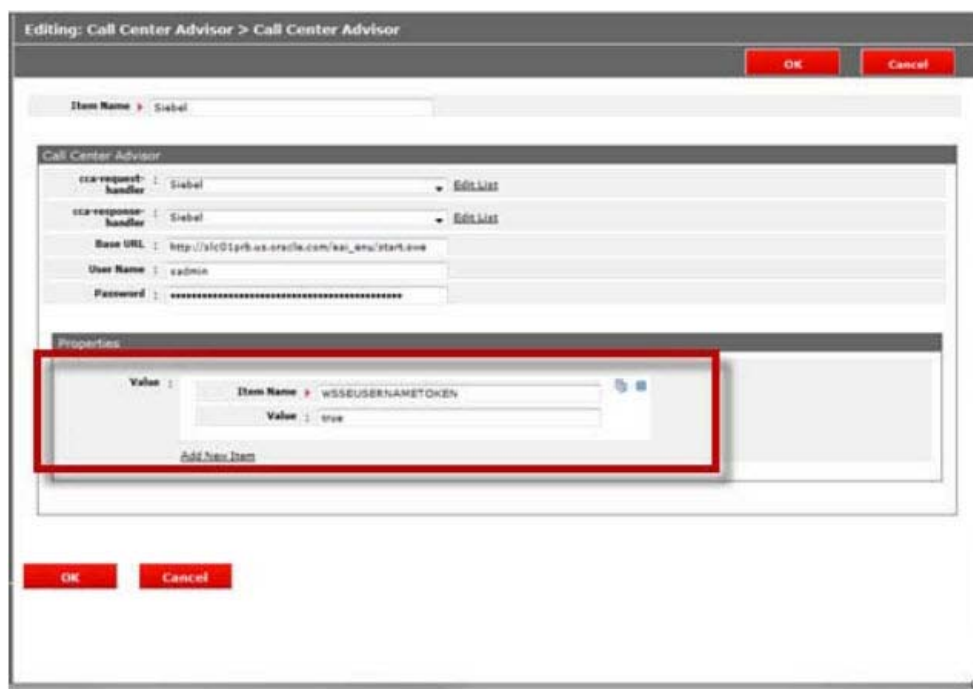
## Configuring Siebel to Support WSSE

Use the following procedure to configure Oracle Knowledge to use Web Services Security Encryption (WSSE) authentication with Siebel.

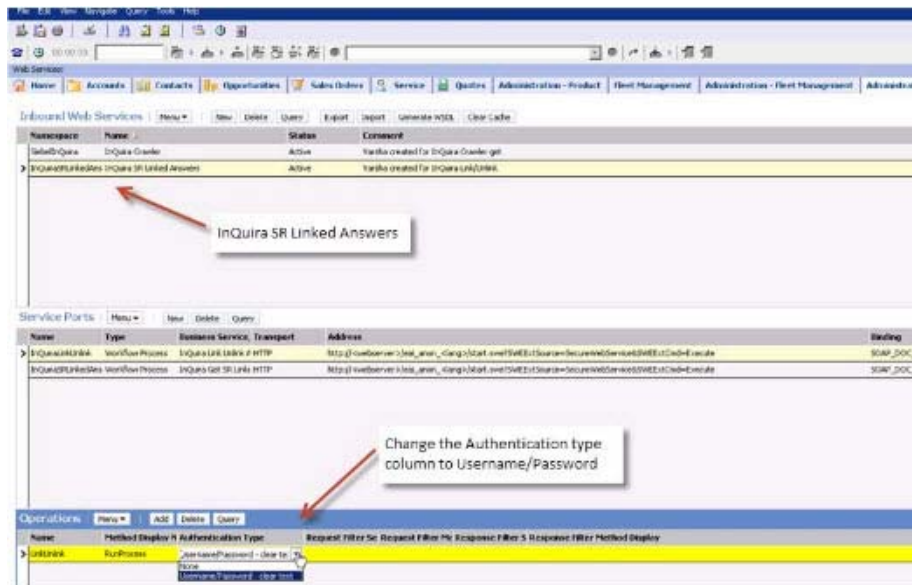
- 1 Make sure the connection URL points to an object manager configured to accept anonymous requests with authentication, typically at:

`http://siebelhost:siebelport/eai_anon_<langcode>/start.swe`

A qualified Siebel administrator can set up the Siebel server and provide you with the correct URL to use.



- 2 Create an additional property called `WSSEUSERNAMETOKEN` and set the value to `true`. If this value is not set, the integration reverts to using URL based username/password authentication.
- 3 Set up the Web services used by InQuira to support WSSE authentication.



- a Within Siebel, navigate to **Site Map >Administration - Web Services > Inbound Web Services**.
- b Query for all Web Services that include *InQuira SR Linked Answers* in the name.
- c For each of the Service Ports, change the Authentication type column to *Username/Password - clear text*.
- d Save and clear the cache for your results to be visible to the Siebel object managers.

## Add a cca-handler-impl

From the **Editing: Call Center Advisor** screen:

- 1 Click **Siebel** in the cca-request-handler-impl section.

The **Editing: Call Center Advisor > cca-request-handler-impl** screen displays.

Editing: Call Center Advisor > cca-request-handler-impl	
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	
Item Name	Siebel
cca-request-handler-impl	com.inquiria.request.cca.CCASiebelHandler

- 2 Review the "Possible Configurations" section and enter the following properties for your configuration:

Property	Description
Item Name	Enter a name for the cca-handler-imp. The Item Name must match what is defined for the "cca_system" on page 30 in the Symbolic URL Argument List. The default is Siebel
cca-request-handler-impl	For Siebel, use the delivered class name: com.inquiria.request.cca.CCASiebelHandler

- 3 Click **Siebel** in the cca-response-handler-impl section.

The **Editing: Call Center Advisor > cca-response-handler-impl** screen displays.

Editing: Call Center Advisor > cca-response-handler-impl

Item Name: Siebel

cca-response-handler-impl: com.inquiria.response.cca.CCASiebelLinkedAnswersRe

OK Cancel

- 4 Review the “Possible Configurations” section and enter the following properties for your configuration:

Property	Description
Item Name	Enter a name for the cca-handler-imp. The Item Name must match what is defined for the “cca_system” on page 30 in the Symbolic URL Argument List. The default is Siebel
cca-response-handler-impl	For Siebel, use the delivered class name: <code>com.inquiria.request.cca.CCASiebelHandler</code>

## Possible Configurations

### PRIMARY CCA CONFIGURATION

To configure one Siebel 7.8, 8.1, or 8.2 system, using iConnect 8.1.3:

- 1 Create a CCA configuration. See “Add a Call Center Advisor” on page 32.
- 2 Create a cca\_handler\_imp. See “Add a cca-handler-impl” on page 34.
- 3 Pass the symbolic URL with a cca\_system matching the Item Name for the cca\_handler\_imp, as defined in “Defining a Symbolic URL” on page 29.

### SECONDARY CCA CONFIGURATION

To configure an additional Siebel 7.8, 8.1, or 8.2 system, using iConnect with 8.1.3:

- 1 Create a second CCA configuration. See “Add a Call Center Advisor” on page 32.
- 2 Create a second cca\_handler\_imp. See “Add a cca-handler-impl” on page 34.
- 3 Pass the symbolic URL with a cca\_system matching the Item Name for the second cca\_handler\_imp, as defined in “Defining a Symbolic URL” on page 29.

### ADDITIONAL THIRD-PARTY CCA CONFIGURATION

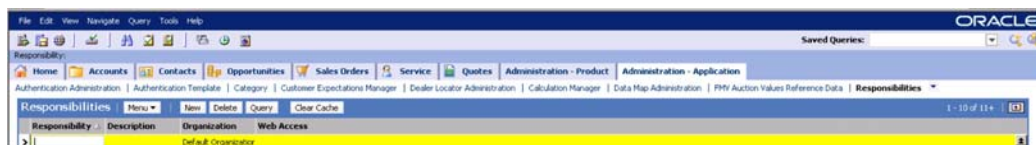
To configure a third-party CRM system (e.g. Clarify or PeopleSoft), using iConnect with 8.1.3:

- 1 Create a CCA configuration. See “Add a Call Center Advisor” on page 32.
- 2 Create a cca\_handler\_imp. See “Add a cca-handler-impl” on page 34.
- 3 Pass the symbolic URL with a cca\_system matching the Item Name for the cca\_handler\_imp, as defined in “Defining a Symbolic URL” on page 29.

## Creating the Oracle Knowledge User Responsibility

To create Oracle Knowledge user responsibility:

- 1 In the Siebel Application, navigate to **Site Map > Administration - Application > Responsibilities** view.
- 2 Select **Menu > New Record** or click **New** on the title bar to create a new record.  
The field for the new record displays:



- 3 Enter the following parameters for the new record:

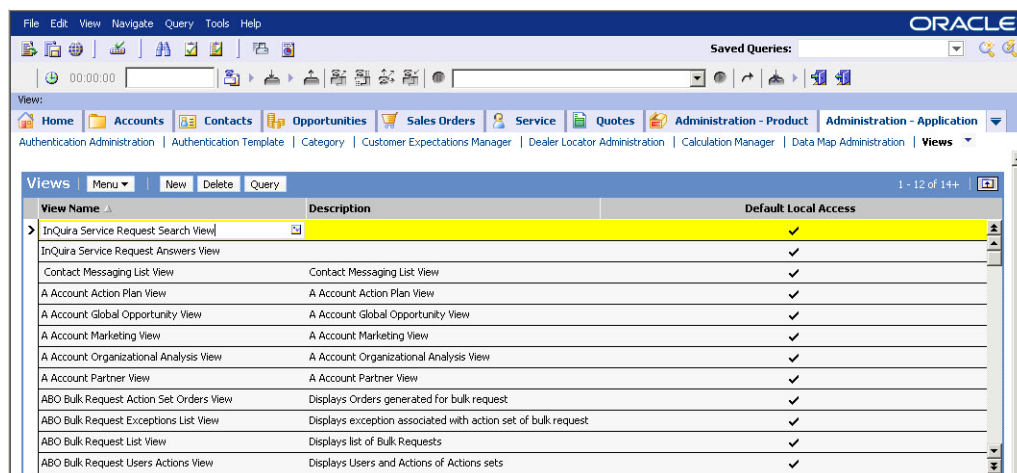
Parameter	Value
Responsibility	InQuira User
Organization	Default organization

- 4 Select **Menu > Save Record** to save the newly created record.

## Defining Application Views

To define Application Views:

- 1 In the Siebel application, navigate to **Site Map > Administration – Application > Views**



- 2 Click **New** and enter two new records, specifying the following parameters:

Parameter	Value
View Name	InQuira Service Request Answers View
Description	(optional)
Default Local Address	Y



Parameter	Value
View Name	InQuira Service Request Search View
Description	(optional)
Default Local Address	Y

- 3 Add both Views to the Oracle Knowledge User Responsibility. For more information, see “Creating the Oracle Knowledge User Responsibility” on page 36.

# Configuring Data Integration

The iConnect for Siebel Contact Center uses the Siebel EAI Framework for data integration between Oracle Knowledge 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 Oracle Knowledge XML format and Siebel's internal format.

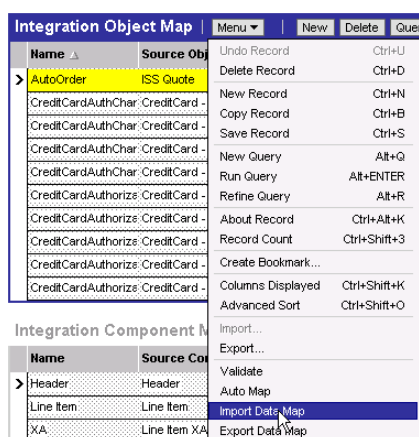
To configure data integration:

- Import the data map as described in “Importing the Data Map” on page 38
- Import the web services as described in “Importing the Web Services” on page 39
- Configure the Service Request as described in “Configuring the Service Request” on page 40

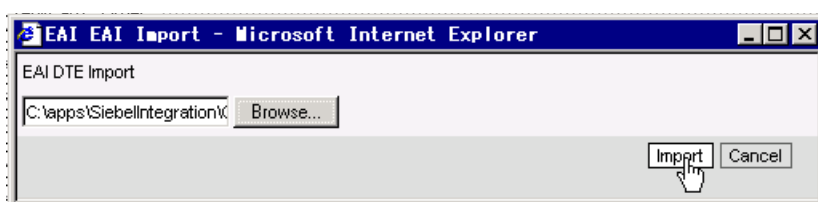
## Importing the Data Map

To import the Data Map:

- 1 Navigate to **Site Map > Administration - Integration > Data Map Editor**
- 2 Select **Import Data Map** in the Integration Object Map applet.



The EAI Import dialog displays:



- 3 Click **Browse** and navigate to the following directory:  
 <Inquire\_home>\archive\siebel\CCA\DataMaps\

to locate the following iConnect data map files:

- InQuiraLinkUnlinkSRDM.XML
- InQuiraSRLinkedAnswersDM.XML

**Note:** If you receive the following error:

Cannot find entry 'InQuira Link Unlink External IO' (or 'InQuira SR Linked Answers IO') in the bounded picklist for the field 'Source Object Name' in integration component 'EAI Object Map' (SBL-EAI-04401)

it is likely caused by the `siebel_sia.srf` not being copied over the existing `siebel_sia.srf`. See “Compiling the Siebel Repository” step 4 for more information.

4 Click **Import**.

5 Click **Browse** and navigate to the `InQuiraSRDetails.XML` file in the following directory:

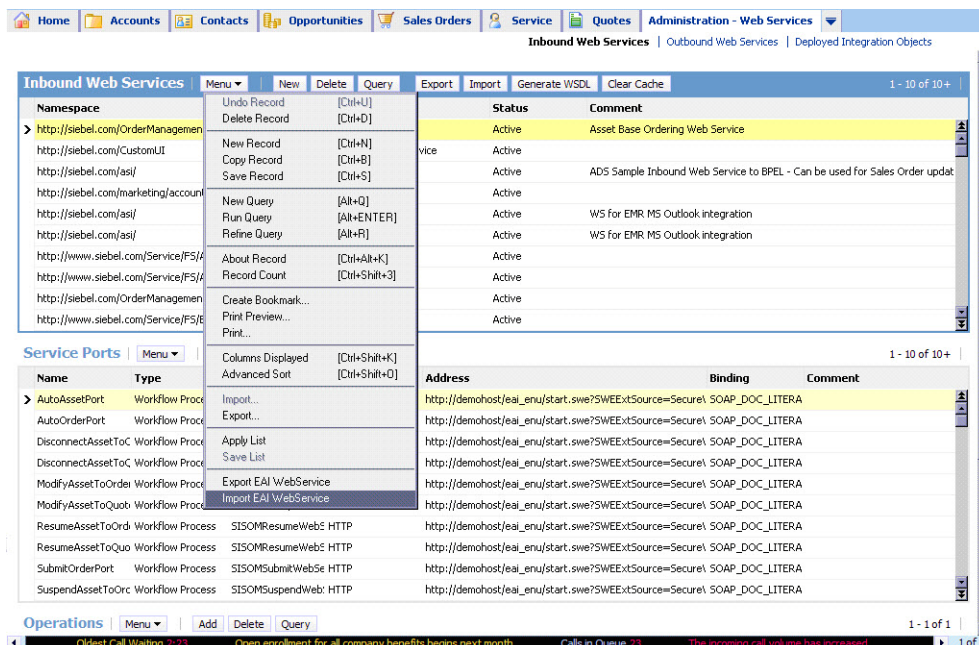
`<InQuira_home>\archive\siebel\CRAWLER\DataMaps\`

6 Click **Import**.

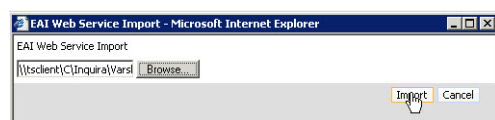
## Importing the Web Services

To import the Oracle Knowledge iConnect web services:

- 1 Navigate to **Sitemap > Administration - Web Services > Inbound Web Services**.
- 2 Select **Menu > Import EAI WebService**.



The EAI Web Service Import window displays.



- 3 Click **Browse** and navigate to the `InQuiraSRLinkedAnswers.XML` file in the following directory:

`<InQuira_home>\archive\siebel\CCA\WebService\`

- 4 Click **Import**.

Siebel Tools imports the Oracle Knowledge web services files.

- 5 Select the record you just imported into the Inbound Web Services Applet.

- 6 Click on the Service Ports applet.

- 7 Modify the Address field for all the records in that applet to use the correct **host name**, **user name**, and **password**. The URL is in the following format:

`http://<Siebel server host name>/eai_enu/start.swe?SWEEExtSource=WebService&SWEEExtCmd=Execute&UserName=<Siebel user name>&Password=<password>`

**Note:** For each Service Port, confirm that the Authentication type column displays, "Username/Password – clear text".

- 8 Click **Browse** and navigate to the `InQuiraCrawler.XML` file in the following directory:

`<InQuira_home>\archive\siebel\CRAWLER\WebService`

- 9 Click **Import**.

Siebel Tools imports the Oracle Knowledge crawler files.

**Important!** Click the **Clear Cache** button when you finish importing the web services.

## Configuring the Service Request

After the successful import of the Siebel SIF files and the steps covered in the earlier chapters, the following activities must be completed to complete the configuration.

- **Configuring Service Request Screen**
- **Configuring Service Request Business Object**

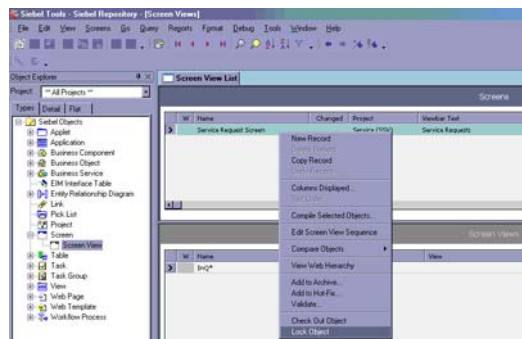
## Configuring Service Request Screen

To configure the Service Request Screen:

- 1 In the Siebel Tools application, click **Screen** on the Object Explorer to display the Screens on the right hand side pane.
- 2 Click **New Query** on the List tool bar to start a search.

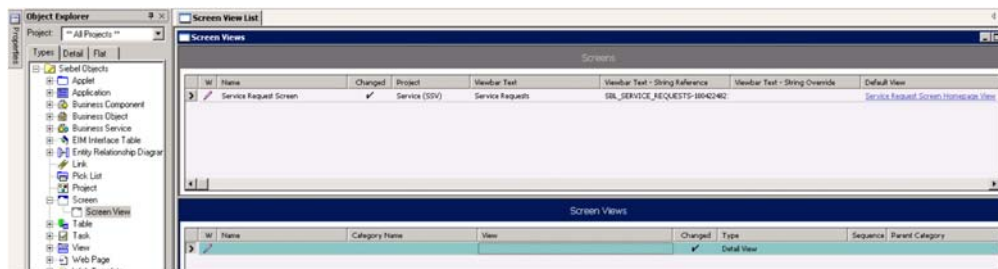


- 3 Enter "Service Request Screen" in the name column of the Screens window at the top and click Execute Query on the List tool bar.
- 4 Click the + sign in front of the Screen on the Object Explorer and in the expanded list, click on Screen View.  
A bottom pane opens displaying the Screen Views that appear under the Service Request Screen.
- 5 Click anywhere on the Screen Views window > New Query. Enter "InQ\*" in the Name column and click the Execute Query icon on the List tool bar. You should not see any views starting with "InQ".
- 6 Select the "Service Request Screen" on the Screens view by clicking on the record.
- 7 With the record selected, right-click to display the context sensitive menu and select **Lock Object** at the bottom.



- 8 Click anywhere on the Screen Views window and right-click to display the context sensitive menu and select **New Record** from the menu.

The field for the new record displays:



9 Enter the following parameters shown under Record1 Value for the new record:

Parameter	Record1 Value	Record2 Value
Name	InQuira Service Request Answers View <sup>1</sup>	InQuira Service Request Search View <sup>1</sup>
View	InQuira Service Request Answers View	InQuira Service Request Search View
Changed	Y	Y
Type	Detail View	Detail View
Sequence	1,000	1,001
Parent Category	Service Request List	Service Request List
Display In Page	Y	Y
Viewbar Text - String Override	Linked Answers	Find Answers
Display In Site Map	Y	Y
Menu Text - String Override	Linked Answers	Find Answers
Status Text - String Override	Linked Answers	Find Answers
Comments	created for InQuira iConnect	created for InQuira iConnect
Inactive	N	N
Upgrade Behavior	Preserve <sup>2</sup>	Preserve <sup>2</sup>

1. This field populates when the View is entered.

2. This field is not editable. After the Service Request Screen is unlocked, the Upgrade Behavior value defaults to **Preserve** for both records.

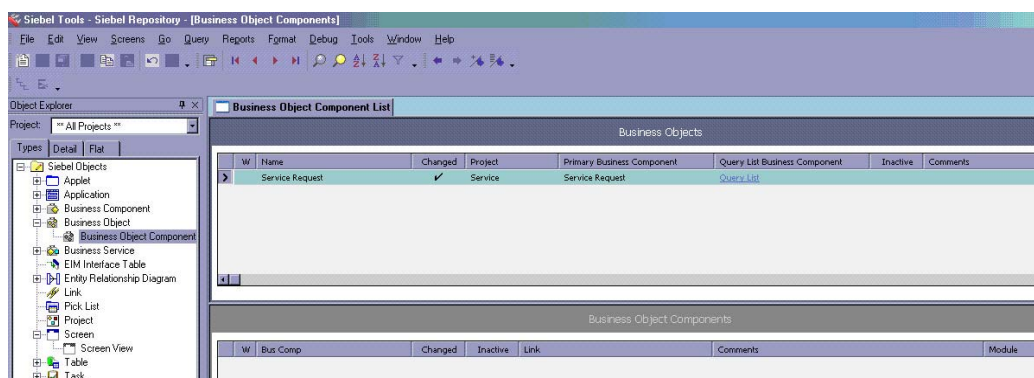
10 Repeat step 8 and step 9 to create another new record with the values shown under Record2 Value.

11 After both records have been added, unlock the Service Request Screen.

## Configuring Service Request Business Object

To configure Service Request Business Object:

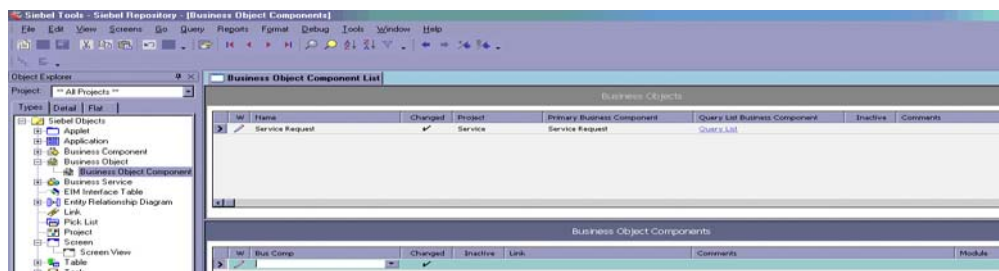
- 1 In the Siebel Tools application, click on Business Object on the Object Explorer to display the Business Objects on the right hand side pane.
- 2 Click **New Query** on the List tool bar to start a search.



- 3 Enter "Service Request" in the Name column of the Business Objects window at the top and click Execute Query on the List tool bar.

- 4 Click on the + sign in front of the Business Object on the Object Explorer and in the expanded list, click on Business Object Component. A bottom pane opens displaying the Business Object Components under the Service Request Business Object.
- 5 Click anywhere on the Business Object Components window > New Query. Enter "InQ\*" in the Bus Comp column and click Execute Query on the List tool bar. You should not see any Business Object Components starting with "InQ".
- 6 Select "Service Request" on the Business Object view by clicking on the record.
- 7 With the record selected, click the right mouse button to pop the context sensitive menu and select "Lock Object" option at the bottom.
- 8 Click anywhere on the Business Object Components window and click the right mouse button to pop the context sensitive menu and select "New Record" from the menu.

The field for the new record displays:



- 9 Enter the following parameters shown under Record1 Value for the new record:

Parameter	Record1 Value	Record2 Value
Bus Comp	InQuira Answers	InQuira Answers EAI
Changed	Y	Y
Inactive	N	N
Link	Service Request/InQuira Answers	Service Request/InQuira Answers EAI
Comments	Created for InQuira iConnect	Created for InQuira iConnect

- 10 Repeat step 8 and step 9 to create another new record with values as shown under Record2 Value.
- 11 After both records have been added, unlock the Service Request Screen.

**Important!** After completing the Service Request Screen and Business Object modifications in Siebel tools, compile all of the changes. After a successful compilation, unlock all of the locked projects on the Siebel Server.

# Configuring the iConnect Integrated User Interface

This chapter describes:

- **Interacting with the Oracle Knowledge Application**
- **Adjusting the iFrame Height**

## Interacting with the Oracle Knowledge Application

The Oracle Knowledge iConnect application can be embedded into the Siebel CRM interface or be launched as a new pop-up window. The user interacts with Oracle Knowledge through the iConnect application, with options to refine their search, navigate through content, provide feedback, or recommend changes to content or create or edit content. The user has a direct link into the Oracle Knowledge authoring environment from iConnect.

In addition, the Oracle Knowledge iConnect application has browser requirements.



To set the browser requirements:

- 1 In Internet Explorer, select Tools > Internet Options.
- 2 Select the Privacy tab.
- 3 Click the **Advanced** button.
- 4 Select **Override automatic cookie handling**.
- 5 Select **Always allow session cookies**.
- 6 Click **OK**.



## Adjusting the iFrame Height

You can configure the height of the search results frame within the Siebel application.

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

- 1 Edit the `Height` parameter of the `IFRAME` argument as specified in “Defining a Symbolic URL” on page 29. The default `iConnect` value is:

```
IFRAME Height=400...
```

- 2 Change the value of the `Height` parameter to the desired value.
- 3 Update the Siebel application.

# Deploying Intelligent Search for Siebel

You deploy iConnect for Siebel Contact Center components within both the Siebel server environment using the Siebel Tools application, and within the Siebel client application.

To deploy iConnect for Siebel Contact Center complete the following:

- **Importing the Runtime Event**

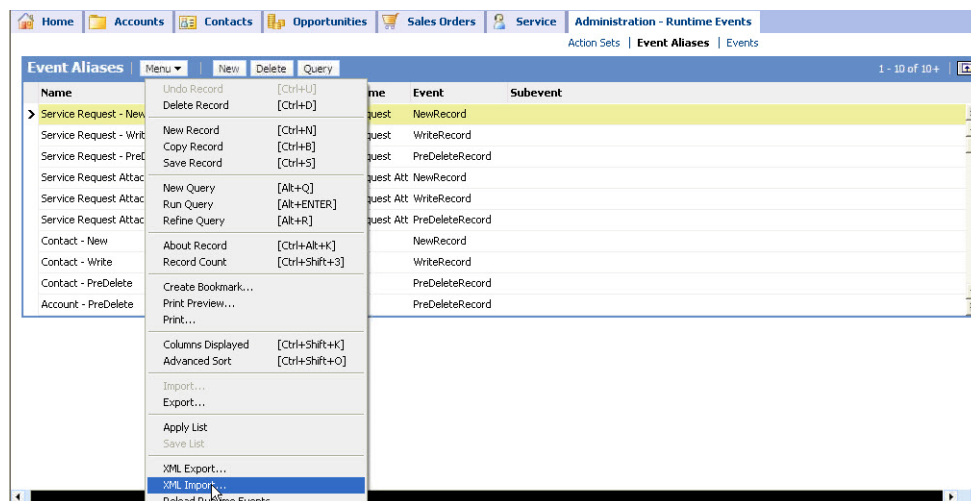
The integration process supplies and configures components, such as the Oracle Knowledge Workflow, within the Siebel environment to enable Oracle Knowledge to access content associated with various Siebel objects.

**Important!** We strongly recommend that you stop the Siebel server before deploying iConnect for Siebel Contact Center.

## Importing the Runtime Event

To import the Oracle Knowledge crawler runtime event:

- 1 Navigate to Sitemap > Administration - Runtime Events > Event Aliases.
- 2 Select Menu, XML Import.



The Import File window displays.



- 3 Click **Browse** and navigate to the RTE.xml file.

<InQuira\_home>\archive\siebel\CRAWLER\RunTimeEvents\

- 4 Select the RTE.xml file and click **Open**.

The Import File dialog box displays. Click **OK**.



- 5 Siebel Tools imports the Oracle Knowledge runtime event files.

# Configuring Oracle Knowledge Content Processing

You configure Oracle Knowledge to process Siebel content so that it is available to Intelligent Search by configuring and scheduling a Siebel crawler. The Siebel Crawler supports the Service Request and Defect business objects; however, you can customize the Siebel crawler access content within other Siebel objects.

**Note:** We recommend that you consult with Oracle Consulting Services for assistance with customizing the Siebel crawler.

The Siebel crawler runs as a scheduled job that you define and administer using the Advanced Configuration Facility Scheduler, as described in the *"Intelligent Search Administration Guide"*.

You tailor the presentation of answers from Siebel content using custom java server pages (JSPs). See "Specifying the URL for Displaying Siebel Answers within Oracle Knowledge" on page 52 more information.

This chapter discusses:

- **Configuring Siebel Content Acquisition**
- **Updating the Oracle Knowledge Content Store**
- **Updating the Dictionary (Optional)**

## Configuring Siebel Content Acquisition

You configure access to Siebel content using the Crawler Settings page of the Advanced Configuration Facility. The *"Intelligent Search Administration Guide"* provides details on accessing and using the Advanced Configuration Facility.

Each crawler configuration defines a document collection. You specify various crawler parameters, as described in *"Specifying Siebel Crawler Parameters"*.

**Important!** A Siebel collection can access only one Business Object type. You must create and configure a unique Siebel crawler for each object type that you want to access.

## Specifying Siebel Crawler Parameters

You configure the crawler's connection to the Siebel application on the **Crawler Settings > Siebel Crawlers** page of the Advanced Configuration Facility.

To configure the Siebel crawler:

- 1 Select **Crawler Settings** from the System section of the Advanced Configuration Facility main menu

The screenshot shows the 'Crawler Settings' page. At the top, there is a header bar with the title 'Crawler Settings' and a red 'Edit' button. Below the header, there is a section 'Show Advanced Options' with a checkbox. The main content area is divided into several sections, each with a label and a value: 'Date Format :', 'Database Crawlers : (none)', 'Siebel Crawlers : (none)', 'Custom Crawlers : (none)', 'Document Attribute : (none)', and 'Collection Group : (none)'. At the bottom, there is a section 'Content Acquisition' with a label 'Commit Interval : 500'.

The **Crawler Settings** page lists the available crawlers.

- 2 Click **Edit**.
- 3 Under **Siebel Crawlers** click **Add New Item**.

The screenshot shows the 'Siebel Crawlers' section. It displays the label 'Siebel Crawlers : (none)'. Below this, there is a red link 'Add New Item'. A mouse cursor is pointing at the link, and a tooltip box appears with the text 'Add a New Item'.

The **Siebel Crawlers** page displays the crawler configuration fields.

Item Name: Siebel\_Crawler

**Siebel Crawlers**

forcedPublic: ☒ On ☐ Off

Connection URL: http://slc01prb.us.oracle.com/eai\_anon\_enu/start.s

siebelDataMapKey: InQuiraSRDetails

Xsl location: ../archive/xsl

User: sadmin

Password: \*\*\*\*\*

Date Format: MM/dd/yyyy HH:mm:ss  
Warning: You need make sure the date format is consistent with Siebel side.

siebelBatchCount: 100

Available for Unstructured Search: ☒ On ☐ Off

Document Filter: (none)  
[Add New Item](#)

Document Attribute Selector: (none)  
[Add New Item](#)

Document Supertitle Selector: (none)  
[Add New Item](#)

Validation Condition: (none)  
[Add New Item](#)

**Build URL**

URL Builder: com.inquiras.content.urlbuilder.ContentStoreURLB

**Properties**

Value:   
Value: true  
[Add New Item](#)

4 Specify the following crawler parameters:

Parameter	Description
<b>forcedPublic</b>	Valid values are On and Off. On is the default.
<b>Connection URL</b>	Specifies the URL of the Siebel application. This parameter is required. There is no default value. Configure the connection URL to point to an object manager configured to accept anonymous requests with authentication, usually, <code>http://&lt;siebelhost:siebelport&gt;/eai_anon_&lt;langcode&gt;/start.swe</code> . When using WSSE (Web Services Security Encryption) this is typically, <code>http://siebelhost:siebelport/eai_anon_&lt;langcode&gt;/start.swe</code> . For more information on configuring the Siebel crawler for WSSE, see "Configuring the Siebel Crawler to Support WSSE".
<b>siebelDataMapKey</b>	Value must match the DataMap name specified on Siebel, delivered as InQuiraSRDetails.
<b>Xsl location</b>	Default is <code>../archive/siebel/crawler/xsl</code> .
<b>User</b>	Specifies the user name for access to the Siebel application content. This parameter is required. There is no default value.
<b>Password</b>	Specifies the user password for access to the Siebel application content. This parameter is required. There is no default value.
<b>Date Format</b>	The date format for the Siebel User (depends on the locale information for the user).
<b>siebelBatchCount</b>	The batch count to retrieve Siebel records at one web service call. Default is 1000.

Parameter	Description ( <i>continued</i> )
<b>Available for Unstructured Search</b>	Specifies whether the documents in this collection will be available to the unstructured information retrieval module. This parameter is required. Valid values are <code>On</code> and <code>Off</code> . <code>On</code> is the default.
<b>Document Filter</b>	Specifies one or more optional filters to limit the documents that will be included in the collection. Valid values are defined document filters, as described in Configuring Document Filters in the <i>"Intelligent Search Administration Guide"</i> .
<b>Document Attribute Selector</b>	Specifies one or more optional document attribute selectors for the crawler. Valid values are defined document attribute selectors, as described in Configuring Document Attributes in the <i>"Intelligent Search Administration Guide"</i> .
<b>Document Supertitle Selector</b>	Specifies one or more optional document supertitle selectors for the crawler. Valid values are defined document supertitle selectors, as described in Configuring Document Supertitles in the <i>"Intelligent Search Administration Guide"</i> .
<b>Validation Condition</b>	Add a validation condition if desired.
<b>(Siebel) Build URL</b>	
<b>URL Builder</b>	Specifies a default class name and method to use the presentation JSP to display answers from Siebel content within the Oracle Knowledge User Interface. The default class name is <code>com.inquiria.content.SampleBuildURL</code> . The default is method is <code>contentStoreURLBuilder</code> .
<b>Properties</b>	
<b>Item Name</b>	WSSEUSERTOKEN
<b>Value</b>	true

- 5 Click **OK** to save the specified values in your configuration.

## Configuring the Siebel Crawler to Support WSSE

Use the following procedure to configure the Siebel crawler to support Web Services Security Encryption (WSSE) authentication.

**Note:** WSSE replaces SOAP URLs for inbound SOAP services.

- 1 Make sure the connection URL points to an object manager configured to accept anonymous requests with authentication, typically at:  
`http://siebelhost:siebelport/eai_anon_<langcode>/start.swe`.  
A qualified Siebel administrator can set up the Siebel server and provide you with the correct URL to use.
- 2 At **Siebel Crawler> Build URL>Properties**, create an additional property configuration called `USEWSSEUSERTOKEN` and set the value to `true`. If this value is not set, the integration reverts to the URL-based username/password authentication.
- 3 Within Siebel, navigate to **Site Map -> Administration - Web Services -> Inbound Web Services**.
- 4 Query for all Web Services that have *InQuira Crawler* in the name.
- 5 For each of the Service Ports, change the **Authentication** type column to *Username/Password - clear text*.
- 6 Save and clear the cache for your results to be visible to the Siebel object managers.

## Specifying the URL for Displaying Siebel Answers within Oracle Knowledge

Oracle Knowledge uses a Java server page (JSP) to create an ad hoc answer source document for presentation within the User Interface. This section provides example configuration information using the default JSP page (`cs.jsp`); however, you must create a custom page to render the Siebel content appropriately for your application.

You must specify a class and a method to create the URLs for the ad hoc answer documents derived from Siebel content for the specified collection. The Siebel Build URL parameters are specified on the **Advanced Configuration Facility Crawler Settings > Siebel Crawlers** page:

Parameter	Description
<b>Class Name</b>	Specifies the Build URL class. The default is <code>com.inquiri.content.SampleBuildURL</code> .
<b>Method</b>	Specifies the Build URL method. The default is <code>contentStoreURL</code> .
<b>Properties</b>	Specifies a required property to enable answer highlighting within constructed Siebel answer documents. Specify the URL of the <code>cs.jsp</code> page in your application server. The following example shows a typical Apache Tomcat implementation:  <code>http://&lt;server_home&gt;/webapps/inquirawb/cs.jsp</code>

## Updating the Oracle Knowledge Content Store

You must perform content processing to add the Siebel content to the Oracle Knowledge application content store. You process Siebel content by scheduling tasks to execute the configured Siebel crawlers.

The *"Intelligent Search Administration Guide"* provides detailed information about scheduling and performing content processing.

## Updating the Dictionary (Optional)

To optimize the accuracy of the Oracle Knowledge search functionality, you may want to add terminology that is specific to the content stored in your Siebel application to the Dictionary, as described in the *"Intelligent Search Administration Guide"*.