Siebel

Search Administration Guide

January 2020



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Search Administration Guide

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Preface

This preface introduces information sources that can help you use the application and this guide.

Using Oracle Applications

To find guides for Oracle Applications, go to the Oracle Help Center at *http://docs.oracle.com/*.

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1 What's New in This Release

What's New in Siebel Search Administration Guide, Siebel CRM 20.1 Update

No new features have been added to this guide for this release. This guide has been updated to reflect only product name changes.

What's New in Siebel Search Administration Guide, Siebel CRM 19.4 Update

The following table lists the changes in this version of the documentation to support this release of the software.

Topic	Description
AutomaticWildcardSearch System Preference	New topic. Siebel CRM prepends and appends a trailing wildcard to a search string if the AutomaticWildcardSearch system preference is set to `TRUE` or does not exist.

What's New in Siebel Search Administration Guide, Siebel CRM 19.1 Update

No new features have been added to this guide for this release. This guide has been updated to reflect only product name changes.

2 Overview of Siebel Search

Overview of Siebel Search

This chapter provides an overview of Oracle's Siebel Search functionality and architecture, and includes the following topics:

- *About Siebel Search*
- *Supported Features for Siebel Find and Siebel Search*
- *Siebel Search Supported Search Engines*
- *Siebel Search Architecture Overview*
- *Using Siebel Search in Siebel Open UI*
- *AutomaticWildcardSearch System Preference*

Note: The procedures in this guide assume that you do not use the Tree navigation control option to access screens and views. However, you can choose to use the Tree navigation control if required. For more information about setting navigation options, see *Siebel Fundamentals Guide* .

About Siebel Search

Oracle's Siebel Search provides incremental indexing of search fields, basic and advanced search functionality for both structured and unstructured data, and Find operations for real-time database queries. Siebel Search is integrated with Oracle Secure Enterprise Search and can also be extended to integrate with other third-party search engines with custom-built adapters.

About Siebel Search Operations

Full text searches can be performed across multiple business components, fields, and files, in one operation. A Search operation allows a broad search by not requiring the user to specify specific fields to search on. Search also gives you the option of searching through attachments.

Note: Searching through attachments applies to Oracle Secure Enterprise Search only and has not been implemented for third-party search engines.

Search operations are case insensitive. Indexed Search requires licensing Oracle Secure Enterprise Search or implementing a custom adapter that integrates with another third-party search engine.

About Siebel Find Operations

A Siebel Find operation consists of a direct query on a database, and allows users to query across all configured fields across multiple categories or on a field-by-field basis using the Advanced Find capabilities. Find objects are accessible through the Search Center, and allow users to perform queries on specific predefined fields linked to specific business components (such as querying for a name in the Last Name field). Find results are a real-time reflection of database records. This makes Find appropriate for searching on transactional database records that change frequently, such as Activity or Opportunity records. Find operations are case sensitive.

Note: The Siebel Query tool is covered in Siebel Fundamentals on the Siebel Bookshelf. The *Siebel Bookshelf* is published on Oracle Technology Network (OTN) and Oracle Software Delivery Cloud.

Supported Features for Siebel Find and Siebel Search

The following table summarizes the features available for Siebel Find, Siebel Search, and third-party search engine.

Feature	Supported for Find	Supported for Search	Supported for Third-Party SE
Siebel Open UI	Yes	Yes	Yes
Business component indexing	Not applicable	Yes	Yes
File system indexing	Not applicable	Yes	No
Web source indexing	Not applicable	Yes	No
Database source indexing	Not applicable	Yes	No
IMAP email source indexing	Not applicable	Yes	No
Lotus notes source indexing	Not applicable	Yes	No
Secure indexing	Not applicable	FTP : Yes	FTP indexing: No
Refresh indexing	Not applicable	Yes	No
Incremental indexing	Not applicable	Yes	Yes
Asynchronous indexing	Not applicable	Yes	Yes

Feature	Supported for Find	Supported for Search	Supported for Third-Party SE
Index status monitoring	Not applicable	Yes. Supported for FTP indexing mode.	Yes
Real time database queries	Yes	No. Searches are run against search indices.	No
Full text search	Not applicable	Yes	Yes
Keyword search	No	Yes	Yes
Automated suggested keywords	No	Yes	Yes
Parametric search (field based search).	Yes	No	Yes
Case insensitive search	No	Yes	Yes
Wildcard search For more information, see *AutomaticWildcardSearch System Preference*.	Yes. Applies to any character, including punctuation characters, such as a space, or a comma. The find operation can span more than one word.	Yes. Does not apply to punctuation characters, such as a space, or a comma. Applies to characters only within a word.	Yes
Boolean operators	No	Yes. Supports AND and OR Boolean operators.	Yes
Searches on content in attachments	No	Yes	No
Searches on external data sources and file systems	Not applicable	Yes	Yes
Search by file format	Not applicable	Yes. The search can be filtered by the following file types: • All • HTML • Microsoft Excel • Microsoft PowerPoint	No

Feature	Supported for Find	Supported for Search	Supported for Third-Party SE
		• Microsoft Word • PDF • Plain text • Rich Text Format **Note:** This features applies only for FileSystem Search. The file format filter cannot be applied on a Buscomp search.	
Search by language	Not applicable	Yes	No
Search History	Yes	Yes	Yes
Password Encryption	Not applicable	Not supported for FTP indexing	Not applicable
Computer Telephony Integration	Yes	Not applicable	Yes
Siebel Smart Answer Integration	Yes	Not applicable	Yes

Siebel Search Supported Search Engines

Siebel Search supports the following search engine options:

- Siebel Find. This is the default search engine setup which is available by default in Siebel Search.
- Third-Party Search Engine Integration. Siebel Search supports the integration of third-party search engines. You must write your own search adapter to enable third-party search engines, and then configure Siebel to use the third-party search engine.
- Oracle Secure Enterprise Search Engine Integration. Siebel Search supports the integration of Oracle Secure Enterprise Search. You must configure Oracle Secure Enterprise Search for Siebel Search (it is not available by default).

The following table summarizes the Siebel Search supported search engine options and lists the topics that you should review for further information.

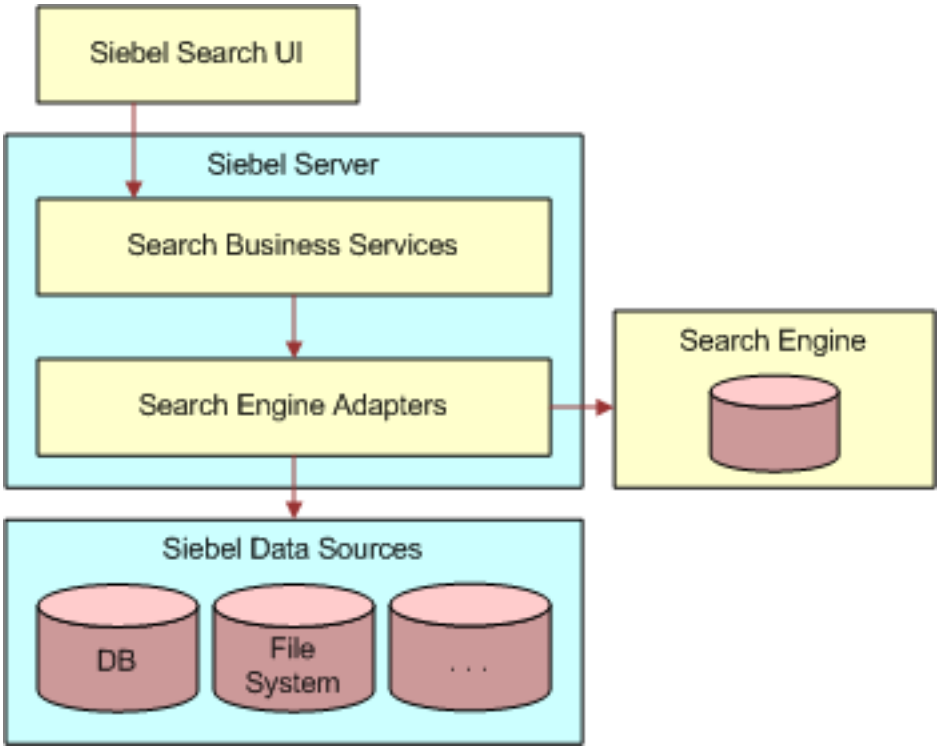
Search Engine	See...
Siebel Find	For more information about Siebel Find, see the following: • *Using Siebel Search in Siebel Open UI*

Search Engine	See...
	• *Configuring Siebel Find*
Third-Party Search Engine	For more information about integrating third-party search engines, see the following: • *Using Siebel Search in Siebel Open UI* • *Configuring Siebel Search for Third-Party Search Engines*
Oracle Secure Enterprise Search	For more information about integrating Oracle Secure Enterprise Search, see the following: • *Using Siebel Search in Siebel Open UI* • *Configuring Siebel Search for Third-Party Search Engines* • *Setting Up Siebel Search with Oracle Secure Enterprise Search* • *Configuring Siebel Search for Oracle Secure Enterprise Search* • *Configuring Index Mappings for Oracle Secure Enterprise Search* • *Administering Siebel Search Index Settings for Oracle Secure Enterprise Search* • *Setting Up Oracle Secure Enterprise Search for Siebel Remote* • *Preconfigured Search Objects for Oracle Secure Enterprise Search* • *Filter Search Specifications Syntax for Oracle Secure Enterprise Search* • *API Examples for Oracle Secure Enterprise Search*

Siebel Search Architecture Overview

Siebel Search architecture contains the elements in the following figure, including the following elements:

- Siebel Search UI. Interface for retrieval of Find and Search results. Support is provided for Siebel Open UI.
- Siebel Server. Hosts the search business services and search engine adapters.
- Search Engine Adapters and Indexing Adapters. Interface with the Siebel data sources and search engine. Index the Siebel business data.
- Data Sources. Indexed data sources, for example, Siebel business components, Web sources, or file systems.



Using Siebel Search in Siebel Open UI

For information about how Siebel Find and Oracle Secure Enterprise Search end user functionality works for applications using Siebel OpenUI, including information on performing the following tasks, see *Siebel Fundamentals Guide* :

- Performing a Basic Search Operation

  Basic search searches every field in every business component configured across all search engines configured for Siebel Search (for example, Siebel Find, Oracle Secure Enterprise Search, and any other third-party search engine configured).

  > **Note:** For Oracle Secure Enterprise Search, user access to search results is determined by the sblvisibilityid index field mapping, and the account profile of the logged in user, such as Position ID or Account ID. For information about configuring the sblvisibilityid index field, see *Defining Index Attributes*. The sblvisibilityid index field mapping does not apply to third-party search engines.

  The auto suggest feature must be enabled for your search engine for auto suggestions to appear when typing in your search criteria. For more information about enabling the auto suggest feature for your search engine, see *Configuring Siebel Find for the Search Results View*.

> **Note:** Sorting is applied to the search results that appear in the results view rather than the entire result set. For third-party search engines, the Search Web Service receives SortField and SortOrder hints from Siebel, which indicates that the search results must be sorted. The Web service issues the appropriate commands to the search engine. The search engine sends results based on the SortField and SortOrder values.

- Performing an Advanced Find Operation

  When you select Advanced Find in the Search Toolbar and then click Find, a drop-down list of categories to search against appears provided that the auto suggest feature is enabled for Siebel Find. For more information, see *Activating the Search Engine for Oracle Secure Enterprise Search*.

- Performing a Siebel Smart Answer Search

  The Siebel Search Center supports integration with the Siebel Smart Answer knowledge base for manual or automated searches. For information on configuring and using Siebel Smart Answer, see Siebel Smart Answer Guide.

- Performing a Siebel Smart Answer Search from Service Requests

  The Siebel Search Center supports integration with the Siebel Smart Answer knowledge base for manual or automated searches. For information on configuring and using Siebel Smart Answer, see Siebel Smart Answer Guide.

- Performing an Advanced Oracle Secure Enterprise Search Operation

  Advanced Oracle Secure Enterprise Search is enabled when a search engine has been configured and set as the default, see *Defining Index Attributes*.

  You can choose to retrieve your search results from multiple data sources. This feature is available if external data sources have been enabled, for example, a File System Connector or a Web Crawler Connector:

  - To enable the File System Connector, see *Configuring the Siebel File System Connector*.
  - To enable the Web Crawler Connector, see *Process of Setting Up the Web Crawler Source and Connector*.
  - Modifying Search Settings for Oracle Secure Enterprise Search

Siebel search allows you to perform full text searches using simple or compound (boolean) query operators. Boolean operators allow you to create a more precise query. For more information about using simple and compound query operators, see *Siebel Fundamentals Guide* .

AutomaticWildcardSearch System Preference

Siebel CRM prepends and appends a trailing wildcard to a search string if the AutomaticWildcardSearch system preference is set to `TRUE` or does not exist. If AutomaticWildcardSearch does not exist, then Siebel CRM behaves as if AutomaticWildcardSearch was set to `TRUE`.

> **Note:** AutomaticWildcardSearch applies when using Siebel Find, including Advanced Find functionality, and the Search Toolbar - it does not apply to Oracle Secure Enterprise Search or Siebel applet search.

When AutomaticWildcardSearch is set to TRUE (the default value), Siebel CRM behaves as follows:

- Siebel prepends and appends any entry in the search text box with *, see example 1 in the following table.
- Siebel executes any entry within double quotes as is. That is, it does not prepend or append any entry within double quotes with *, see example 2 in the following table.
- Siebel executes any entry with * as is, see example 3 in the following table.

Example	User types in the following:	Siebel Find searches for the following:	The Search Results pane displays the following
1	Antonio	*Antonio*	Results for *Antonio* in All Categories
2	“Antonio”	Antonio	Results for Antonio in All Categories
3	Antonio* *Antonio *Antonio*	Antonio* *Antonio *Antonio*	Results for Antonio* in All Categories Results for *Antonio in All Categories Results for *Antonio* in All Categories

When AutomaticWildcardSearch is set to FALSE, Siebel CRM behaves as follows:

- Siebel executes any entry in the search text box as is. That is, it does not prepend or append the search string with *, see example 1 in the following table.
- Siebel executes any entry within double quotes as is. That is, it does not prepend or append any entry within double quotes with *, see example 2 in the following table.
- Siebel executes any entry with * as is, see example 3 in the following table.

Example	User types in the following:	Siebel Find searches for the following:	The Search Results pane displays the following:
1	Antonio	Antonio	Results for Antonio in All Categories
2	“Antonio”	Antonio	Results for Antonio in All Categories
3	Antonio* *Antonio *Antonio*	Antonio* *Antonio *Antonio*	Results for Antonio* in All Categories Results for *Antonio in All Categories Results for *Antonio* in All Categories

3 Configuring Siebel Find

Configuring Siebel Find

This chapter describes how to configure Siebel Find objects and Find functionally. It includes the following topics:

- *About Siebel Tools Configuration Tasks*
- *About Siebel Tools Find Objects*
- *Configuring Searchable Find Categories*
- *Configuring Find Parameters for Computer Telephony Integration*
- *Configuring Siebel Find for the Search Results View*
- *Displaying System Fields in Find Results*
- *Configuring Access Control for Find Operations*
- *Integrating Siebel Search With Siebel Applications*
- *Siebel Tools Find Object Reference*

This chapter assumes knowledge of Siebel Tools. For more information, see *Using Siebel Tools* .

About Siebel Tools Configuration Tasks

Siebel Tools is a declarative software development tool that allows you to configure the underlying data and data presentation of your Siebel application without making changes to the program source code. Siebel Business Applications provide a core set of search object definitions that you can use as a basis for your tailored application. There are no source code modifications, nor modifications to schema. Siebel Tools uses the Siebel Runtime Repository configuration provided by Oracle.

About Siebel Tools Find Objects

Your Siebel application contains a list of application-specific Find objects. Users have access to the Find objects that are associated to the application being used, depending on their responsibilities. You can also specify a default Find object for your Siebel application. Find objects identify business components and corresponding fields that can be searched. Global Find items are used to perform find operations on particular business components. Following execution of a Find, the Find Results view in the main window lists records from the application that satisfy the Find criteria.



Note: Customizing Siebel Find using virtual business components (VBCs) is not supported.

Configuring Searchable Find Categories

This topic covers the activation of Find objects to display as searchable Find categories in the Search Center Look In list.

To configure searchable Find categories

1. Log in to Siebel Tools.
2. Select the application for which Find categories are to be configured in the Application Object Explorer.
3. Navigate to Application Find in the Object Explorer and activate the Find Objects that you want to display as searchable Find categories in the Search Toolbar.
4. Make sure that the relevant Business Components are part of the Search Execution Business Object.
5. Update the repository and deliver the updates.



Note: Changes made to the Application Find object in Siebel Tools are automatically reflected in the UI.

Configuring Find Parameters for Computer Telephony Integration

This topic covers configuring event response parameters for Find to enable CTI (Computer Telephony Integration) functionality in the Siebel Search Center. OnInboundCallReceived event response, to automatically launch the Search Center with pre-populated search criteria, when an agent accepts a call on the CTI toolbar.

Siebel CTI provides voice-channel support for call center agents using Siebel Business Applications. Agents are notified of incoming calls through the communications toolbar, and can perform a range of call-handling activities using the toolbar and related menu commands. If the CTI Find parameters are defined for the OnInboundCallReceived Event Response, and if QuerySpec does not return any records, then the Search Center is automatically launched when the agent accepts a call. The Search Center is automatically pre-populated with the criteria specified in the Find Event Response parameters. For more information on configuring Siebel CTI, see *Siebel CTI Administration Guide*

To configure Find and Computer Telephony Integration for the Siebel Search Center

1. Navigate to Site Map, Administration - Communications screen, then the All Configurations view.
2. Select the Configuration for which you want to define the Event Response.
3. Select the Event Handlers tab.
4. Select the OnInboundCallReceived Event Response.
5. Click the Event Response Parameters tab and configure the Find parameters. Some fields are described in the following table.

Field	Sample Value	Description
FindDialog	Service Request	Find object name to determine what Find Category is displayed in the Look In field when the Search Center is launched. The Find object name must match that defined in the Find column of the Application Find view in Siebel Tools for the Siebel application that you are using, for example, set this to the Service Request business component.
FindField.<Display Name>	{ANI}	The FindField.<Display Name> Event Response Parameter is used to dynamically pre-populate Find fields in the Search Center. The Display Name must match that defined in Siebel Tools. The following sample FindField.<Display Name> Event Response Parameters are used to define pre-populated field values for the Service Requests Find Category: • FindField.CSN. Set this field value to {ANI} to pre-populate the Service Request CSN (Customer Service Number) field with the incoming telephone number. At runtime, on answering a call from the CTI toolbar, the Find CSN field in the Search Center is pre-populated with the telephone number of the incoming call. • FindField.First Name. Set this field value to {@UserName} to pre-populate the Service Request First Name field with the agent's User Name. At runtime, on answering a call from the CTI toolbar, the Find First Name field in the Search Center is pre-populated with the agent's User Name for the Siebel application.

Configuring Siebel Find for the Search Results View

Siebel Find is installed, activated, and configured by default in Siebel business applications. However to enable or disable Siebel Find so that it appears or is hidden in the Search Results view, to enable or disable auto suggest for Siebel Find, or to change the position of the Siebel Find tab in the Search Results view, then complete the steps in the following procedure.

Note: The search engine settings for Siebel Find are configured in the Administration - Search screen, Search Engine Settings view. For information about the different search engine settings that you can set for Oracle Secure Enterprise Search and third-party search engines in general, see *Configuring Search Engine Settings for Oracle Secure Enterprise Search* and *Configuring Siebel Search for Third-Party Search Engines*.

Search results are displayed in the Search Results view. In the Search Results view, when you drill down on a record to see the detailed record information, the search results are retained. This mode of display is known as Results Retention Mode. Preview and Attach features are available in Results Retention Mode

To configure Siebel Find for the Search Results view

1. Navigate to the Administration - Search screen, then the Search Engine Settings view.
2. In the Search Engine applet, go to the Siebel Find record and modify the values for the record as shown in the following table.

Field	Description	Value
Engine Name	Name of the search engine, which appears as the tab display name in the Search Results view.	Siebel Find **Note:** Siebel Find is the default display name but you can modify this as required.
Search Adapter	Name of the search adapter, which maps to the search engine configured.	Siebel Find Adapter Service
Sequence Number	Indicates the position where the the Siebel Find tab will appear in the Search Results view. For example, 1 indicates the first position and so on.	1
Active	Indicates whether to show (Y) or hide (N) the Siebel Find tab in the Search Results view.	Y
Auto Suggest Supported	Indicates whether to enable (Y) or disable (N) the auto suggest feature for Siebel Find.	Y

3. In the Driver Parameters applet, configure the driver parameters for Siebel Find as shown in the following table.

Name	Description	Default Value
Default Categories	If no category is specified for a search, then Siebel Find searches categories according to the value in this parameter setting.	All **Note:** All means to search all categories.

Displaying System Fields in Find Results

This topic covers exposing system fields in the Find Results view. For more information on system fields and system columns, see Configuring Siebel Business Applications.

Note that for third-party search engines, the data displayed in the Find Results view is as follows and you cannot modify the data:

- Result title, which is in the following format: Category Name - Matched Field Name - Matched Field Value.
- Result fields, which appear when you click the arrow beside a result to show a summary of the search result. The result fields include all the indexed fields, but system fields such as RowID, Created on, and Created By are not included.

Displaying the ID System Field in Find Results

This topic provides an example of exposing a system field that already exists in the Field picklist, such as the ID system field. The ID system field represents the ROW_ID column in the base table. This example uses the Accounts business component.

To display the ID system field in the Find Results view

1. Log in to Siebel Tools.
2. Select Find in the Object Explorer.
3. Query for Account.
4. In the Object Explorer, navigate to the Find Field object.
5. Right-click on the Find Field object and create a new record with the following details:
    - Display Name = ID
    - Field = Row ID
    - Display In Results = TRUE
6. Update the repository and deliver the updates.

Displaying the Created System Field in Find Results

This topic provides an example of exposing a system field that does not already exists in the Field picklist, such as the Created system field. An alias field must be created for the system field, such as Date Created. For information on which column name to use for each system field, see Configuring Siebel Business Applications. This example uses the Accounts business component.

To display the Created system field in the Find Results view

1. Log in to Siebel Tools.
2. Select Business Component in the Object Explorer.
3. Query for Account.
4. In the Object Explorer, navigate to the Field object.

5. Right-click on the Find field and create a new record with the following details:
    - Column = CREATED
    - Name = Date Created
6. Select Find in the Object Explorer.
7. Query for Account.
8. In the Object Explorer, navigate to the Find Field object.
9. Right-click on the Find Field object and create a new record with the following details:
    - Display Name = Created
    - Field = Create Date
    - Display In Results = TRUE
10. Update the repository and deliver the updates.

Configuring Access Control for Find Operations

Access control for Find is accomplished through specifying views for a Find object. For example, you can define All Accounts across Organizations as a Find View for an Account Find object. Within Siebel Search, visibility determines the set of records displayed to the user from specific business components in the Find Results view. The user's access to records is determined through a combination of user position, Siebel Tools object attributes, and record values. The following visibility modes can be applied for Find operations within Siebel Business Applications:

- All Organizations view. The user has access to all records.
- All view. User has access to all records in his or her own organization.
- Team view. User has access to records in his or her team.
- My view. User has access only to his or her own records.

For more information on each visibility mode, and on setting up visibility within your Siebel application, see *Siebel Security Guide* .

Integrating Siebel Search With Siebel Applications

Siebel Search is enabled by default for most Siebel applications. You can search or query for records in your Siebel application provided that a search control has been configured in Siebel Tools for the specific view or applet in question. If you do not see a search toolbar or text box when you navigate to a view or applet in your Siebel application, then a search control has not been configured in Siebel Tools for that particular view or applet.

You can customize Siebel Search to suit your own business needs. The following procedure shows you how to integrate Siebel Search in to an application.

To integrate Siebel Search in to an application

1. Log in to Siebel Tools and do the following:
    a. Go to the Application object and make a note of the Container Web Page.

The Container Web Page specifies the Web page object definitions that Siebel CRM uses to display the elements that surround a Siebel view. This page contains typical user interface elements, such as viewbars, screenbars, logos, search control, and so on.

b. Go to the Web Page object and search for the Container Web Page that you noted in Step a.

- Expand the Web Page object and then add a new Web Page Item entry with the values shown in the following table:

Field Name	Value
Name	Search Results Pane Applet
Type	Applet
Item Identifier	10,000

- Drill down into the Web Page Item that you added in the previous step and then add a new Web Page Item Parameter with the values shown in the following table:

Field Name	Value
Name	Mode
Value	Edit List

- Make a note of the Web Template for the current Web Page.

c. Go to the Web Template object in Siebel Tools and search for the Web Template for the current Web page that you noted in the previous step.

In the definition for that Web Template, add the following piece of code:

```
<!-- SEARCH TOOLBAR START -->
<div class="siebui-banner-btn siebui-srch-banner-btn" title="Search Button">
 <div id="s_srch_new" class="siebui-search-esearch bannerDiv
ToolbarButton">
 <div id="srch_icon_new" class="ui-menubar siebui-search-tb-btn siebui-
icon-search" title="Search" role="text"><span></span></div>
 </div>
</div>
<div id="searchtoolbar" class="siebui-banner-btn siebui-search-bar"
title="Search Toolbar">
 <div id="searchtoolbaroption" class="siebui-search-option">
 <button class="siebui-search-toolbar-options siebui-closed"
id="srch_toolbar_option">
 </button>
 <ul class="ui-menu ui-widget ui-widget-content siebui-search-dropdown-
menu-hide" role="menubar" tabindex="0">
 <li id="srch_settings" class="siebui-appmenu-item ui-menu-item"><a
```

```
href="c_Feed_File_Example_vp203175.ditac_Feed_File_Example_vp203175.dita" class="ui-state-
disabled"></a></li>
 <li id="srch_adv_find" class="siebui-appmenu-item ui-menu-item"><a
href="c_Feed_File_Example_vp203175.ditac_Feed_File_Example_vp203175.dita" class="ui-state-
disabled"></a></li>
 <li id="srch_adv_search" class="siebui-appmenu-item ui-menu-item"><a
href="c_Feed_File_Example_vp203175.ditac_Feed_File_Example_vp203175.dita" class="ui-state-
disabled"></a></li>
 <li id="srch_barcode" class="siebui-appmenu-item ui-menu-item"><a
href="c_Feed_File_Example_vp203175.ditac_Feed_File_Example_vp203175.dita"></a></li>
 </ul>
 </div>
 <div id="searchtoolbarsrch" class="siebui-search-text">
 <input type="text" id="srch_toolbar_text_box" class="siebui-search-
toolbar-textbox"/>
 </div>
</div>
<!-- SEARCH TOOLBAR END -->
```

2. Log in to your Siebel application and modify the manifest as follows:

> **Note:** If your application uses a custom Web Page presentation model or physical renderer, then manifest changes are not required so skip this step and proceed to Step 3.

   a. Navigate to the Administration - Application screen, then the Manifest Administration view.
   b. Query for the following:

Field Name	Value
Type	Web Page
Name	Container Web Page

   c. Activate the Web Page entries (if not already activated).
   d. Select Physical Renderer in the Usage Type field, click Navigate to Files, and then do the following:
      - Inactivate the following existing Name entry: `Name = 'siebel/webpgpr.js'`
      - Associate a new file with Name as follows: `Name = 'siebel/searchrenderer.js'`
   e. Select Presentation Model in the Usage Type field, click Navigate to Files, and then do the following:
      - Delete the following existing Name entry: `Name = 'siebel/webpgpm.js'`
      - Associate a new file with Name as follows: `Name = 'siebel/searchmodel.js '`
3. If using a customized Web Page presentation model or physical renderer, then make sure that your application inherits the following searchmodel and searchrenderer to enable the search functionality in the Web Page presentation model and physical renderer:

> **Note:** This step is required only if your application uses a custom Web Page presentation model or physical renderer. All customized Web Page presentation model and physical renderer is inherited from the Search presentation model and physical renderer.

   - The Presentation Model (`siebel/searchmodel`) inherits `siebel/webpgpm`

   Sample code for the custom presentation model is as follows:

```
if (typeof (SiebelAppFacade.ShoppingCartWebPagePM) === "undefined") {
 SiebelJS.Namespace('SiebelAppFacade.ShoppingCartWebPagePM');
 define("siebel/shoppingcartwebpagepm", ["siebel/searchmodel.js"], function () {
```

- The Physical Renderer (`siebel/searchrenderer`) inherits `siebel/webpgpr`
  Sample code for the custom physical renderer is as follows:

```
if (typeof (SiebelAppFacade.ShoppingCartWebPagePR) === "undefined") {
 SiebelJS.Namespace('SiebelAppFacade.ShoppingCartWebPagePR');
 define("siebel/shoppingcartwebpagepr", ["siebel/searchrenderer.js"], function () {
```

Siebel Tools Find Object Reference

This topic contains reference information on Find Objects contained in your Siebel application. These include the following:

- *Find Object*
- *Application Find Object*
- *Find Field Object*
- *Find View Object*
- *Find Field Locale Object*
- *Find Locale Object*
- *Find Pick View Object*

Find Object

A Find object definition creates a searchable Find Category that can be added to the Search Center Look In list, and a corresponding set of Find fields and possible views. The Find fields and find views are implemented as child object definitions of the Find object. Predefined Find objects are provided for each Siebel application.

Find Object Properties

The following table lists the Find object properties.

Property	Required	Description
Applet	Required	The applet that will be used by the Find object. It is required that the applet defined be on every one of the views defined in the Find views for the Find operation to work properly. When configuring the Find object, the choices you have for selecting come from the business component on the applet.
Destination Field	Optional	A TRUE or FALSE value, which if TRUE, highlights this Find object definition in the Search Center list. This property applies only to the initial find operation in the application.
Display Name	Optional	The name that will be displayed to the user, such as Accounts.

Property	Required	Description
Drilldown View	Optional	The view that appears when the user drills down. If this property is not set (has no value), then the view is taken from the Find View records. If a Drilldown View is not specified, the view in the Find Views that the user has access to will be used. You cannot disable the drilldown on find objects.
Name	Required	The name of the Find object definition. This is referenced when setting up Application Find object definitions that use this Find object definition.
Preview	Optional	The view that appears when a user invokes the Preview button. This feature allows the user to preview a result record in a pop-up window.

Application Find Object

An application Find object definition associates one Find object definition with one application. Application Find is a child object type of Application. The name of the Find object definition appears in the Find property in the Application Find object definition. Each application has multiple Find objects defined as Find Categories in the Search Center Look In list, each one included by virtue of an Application Find object definition. You can also specify a default find in the Object Properties list.

Application Find Object Properties

The following table lists the Application Find object properties.

Property	Required	Description
Default Find	Optional	Valid values for the Application Find Default Find object are TRUE or FALSE. Setting this value to TRUE allows you to set the default Find object for your application. The default find object is defined in the Application Default Find property. For information on the Application Default Find property, see Siebel Object Types Reference. The default Find object displays as the default Find category in the Search Center Look In list.
Find	Required	The Find object definition to include in the application. Example values include Contact and Account.
Name	Required	It is the same as the Find property.
Sequence	Required	The order in which the Find Category appears in the Search Center Look In list. This property takes an Integer value.
Text	Required	The translatable text that appears as the title of the Find dialog box.

Find Field Object

The Find Field is a child object type of Find. A Find Field object definition adds a find field to its parent Find object definition. The find field appears as a text box in the Search Center when the parent Find is active. Each child Find Field object definition provides the parent Find with a find value text box and corresponding Find field name to search.

Find Field Object Properties

The following table lists the Find Field object properties.

Property	Required	Description
Display Name	Optional	The text (or key to localized text) that will be displayed for this find field when its parent Find object definition is active in the Search Center window.
Field	Required	The field being searched in the business component.
Name	Required	Name of the search field added.
Sequence	Optional	The position of this find field in the list of fields displayed in the Search Center-Find category for the parent Find object definition.
Display in Results	Optional	Selecting this option allows the field to be displayed on the find results applet in the Search Center. By default, the whole field value will be displayed, but you can set a limit so that characters after the maximum length will be skipped. An ellipsis (...) is appended to the end of the results when a limit is set. You must use the user property in Find Results List Applet to set the length limit. Use the following applet user properties: • User Property Name: [Find object Name] • User Property Value: [Find Field] = [Length] If there is more than one, use the following applet user property syntax: User Property Value: [Find Field Name] = [Length], [Find Field Name] = [Length], [Find Field Name] = [Length]...
Display in Entry	Optional	Selecting this option allows the field to be displayed on the find entry applet in the Search Center.

Find Field Object Rules and Assumptions

- Boolean operators are not supported when searching on a Find object.
- The field specified in a find field must be a field that exists in the business component for the applet for the Find object definition.
- The Search Center-Find category and a query by example (QBE) can have different behavior for multi value fields, because the Search Center will generate the same query as if you did an EXISTS query on the field in QBE. You can verify this by embedding your QBE expression with Exists(), for example, (Ada*).

- QBE supports both types of querying, but to keep the Search Center simple, Siebel Business Applications implement a query that works in all cases. This query uses the syntax Ada* (where the wildcard, as indicated by an asterisk (*) is appended to the search text). If you want to mimic the behavior of the nonExists version with the Search Center-Find category, you must create a join from the primary ID field for the MVLink to the table containing the data. Then add a field to the table you joined to, and point your find field to this new field. This configuration change will cause the query to do a query on the join field that does not use EXISTS.
- If you want to do an exact search in a Find field, prefix the search text with an equal sign (=), for example, = Ada. The query uses the syntax = Ada. (No wildcard is appended to the text.)
- Do not configure the State field as a Find Field for a Find object.

  For example, if the Accounts Find object configuration in Siebel Tools includes the State Find Field, then the State field appears as an option (in the Accounts Find object menu) in the UI. In such a case, do the following in Siebel Tools to remove the State field from the Accounts Find object menu:

  - Deactivate the Find Field, then update the repository and deliver the update.
  - Disable the State field for the required language.
  - Disable the State Find Field for the Accounts Find Object.

Find View Object

Each Find view object definition specifies a view that can be activated when the parent Find is initiated from the Search Center. Each find view specifies a different visibility level for the same business component. The views are acted upon in a fixed order, as specified in the Sequence property of the Find view object, until a view is encountered in which the user can view data. The visibility for this view is then applied to the results from the query on the Find object.

For a given user, the find operation uses the first find view object definition that is in the user's responsibility list. Because different views apply different visibility, you have the least restrictive views, first in the list, and the most restrictive, last. This order allows users with different responsibilities to find items using the most broad visibility that they have access to use.

Find View Object Properties

The following table lists the Find View object properties.

Property	Required	Description
Sequence	Optional	The order that views are used for the Find object definition.
View	Required	The name of the view to be used for the find operation when this find view is used.

Find Field Locale Object

Locale objects are children of Find Field objects and contain all translatable information. Locale objects represent language-specific overrides used with the Find Field object type.

Find Field Locale Object Properties

The following table lists the Find Field Locale object properties.

Property	Required	Description
Display Name	Optional	The text or that will be displayed for this find field when its parent Find object definition is active in the Search Center.
Name	Required	The abbreviation of the language being used. For example, the value ENU is used to denote U.S. English.

Find Locale Object

Find Locale objects are children of UI objects and contain all translatable information. They represent the language-specific overrides, used with the Find object type.

Find Locale Object Properties

The following table lists the Find Locale object properties.

Property	Required	Description
Display Name	Optional	Description on the Find Locale object property.
Name	Required	The abbreviation of the language. For example, the value ENU is used to denote U.S. English.

Find Pick View Object

Users can associate find results from the Search Center with the active record in the main content area. The Pick View object, located under Find Pick View, identifies the applet that can receive the selected item from the Find Results List as an associated record. This applies only to applets that can handle such associations.

Find Pick View Object Properties

The following table lists the Find Pick View object properties.

Property	Required	Description
Applet Name	Required	Name of the applet
View Name	Required	Name of the view containing the applet

Property	Required	Description
Name	Required	Logical name of the pick view
Field Name	Optional	Name of the multivalue group field that will receive the search result

4 Configuring Siebel Search for Third-Party Search Engines

Configuring Siebel Search for Third-Party Search Engines

This chapter describes how to configure Siebel Search for third-party search engines. It includes the topic: *Process of Configuring Siebel Search for Third-Party Search Engines*.

Process of Configuring Siebel Search for Third-Party Search Engines

Siebel Search can work with any third-party search engine, provided that the third-party search engine has a Web service endpoint. If the third-party search engine has a Web service endpoint, then Siebel Search can do the following:

- Send indexing and search requests to the Web service endpoint.
- Receive responses and display the responses in the Siebel application's Search Results view.

To set up third-party search engines for integration with Siebel Search, perform the following tasks. Note that the third-party Elastic Search Engine is used as an example in the tasks in this process.

- Write a Web service for your Search Engine and host it on a Web server.
  For more information about writing a Web service for a search engine, see 2128418.1 (Article ID) on My Oracle Support.
- *Configuring Siebel Search for Third-Party Search Engines*
- *Defining Index Categories for Third-Party Search Engines*
- *Configuring Indexing for Third-Party Search Engines*
- *Configuring Incremental Indexing for Third-Party Search Engines*

Configuring Siebel Search for Third-Party Search Engines

Configuring Siebel Search for third-party search engines involves adding a new search engine record and configuring the search engine settings as required.

This task is a step in *Process of Configuring Siebel Search for Third-Party Search Engines*.

To configure Siebel Search for third-party search engines

1. Navigate to the Administration - Search screen, then the Search Engine Settings view.
2. In the Search Engines applet, add a new record for the third-party search engine and configure the fields described in the following table for the new search engine.

For example, add an Elastic Search Engine record with the values shown in the following table.

Field	Description	Value
Engine Name	Name of the search engine, which appears as the tab display name in the Search Results view.	Elastic SE
Search Adapter	Name of the search adapter, which maps to the search engine configured.	WS Search Adapter Service.
Sequence Number	Indicates the position where the Elastic SE tab will appear in the Search Results view. For example, 1 indicates the first position and so on.	2
Active	Indicates whether to show (Y) or hide (N) the Elastic SE tab in the Search Results view.	Y
Auto Suggest Supported	Indicates whether to enable (Y) or disable (N) the auto suggest feature for search.	Y

3. In the Driver Parameters applet, configure the fields for the third-party search engine.

   For example, configure the fields shown in the following table for Elastic SE.

Field	Description	Value
URL	The address of the Web Service for the third-party search engine.	http://<ip_address>:<port_number>/SiebelSearchService/SiebelSearchService
Batch Submit Size	The number of records submitted at a time for indexing. The Object Manager query performance, search engine footprint size, and Siebel Server specification are used in determining optimum Batch Submit Size. Set the value to the following: o If you are using FTP indexing, set the value to less than or equal to 1500.	1000
Batch Split Size	The number of business component records in a batch. The Object Manager query performance, search engine footprint size, and Siebel Server specification are used in determining optimum Batch Split Size. Set the value to the following:	100

Field	Description	Value
	◦ If you are using FTP indexing, set the value to less than or equal to 4500.	

Defining Index Categories for Third-Party Search Engines

The following procedure shows you how to define index categories and the fields in each index category to index for third-party search engines.

When setting up the fields to index in each index category,

This task is a step in *Process of Configuring Siebel Search for Third-Party Search Engines*.

To define new index categories for third-party search engines

1. Navigate to Administration - Search screen, then the Search Category Settings view.
2. Click New (the plus (+) icon) to define a new category to index, and then do the following:
   a. In the BC Name field, click the look up icon, select a business component from the list that appears, and then click OK.
   b. In the Name field, enter a name for the new category.
   c. In the Name field, drilldown on the hyperlink.
3. Go to the Available Fields tab and specify the fields in the category to be indexed as follows:
   a. Click New (the plus (+) icon) to add fields to the category as required.
   b. For each field in the category, select (Y) or deselect (N) the check box in the Searchable column.

      Y indicates to index the field and N indicates not to index the field in the category.
   c. (Optional) Enter a weighting for each field in the Weighting factor column.
4. Go to the Applications tab and add applications and views to the category as follows:
   ◦ Click New (the plus (+) icon), then add an Application Name.
   ◦ In the Drilldown Views applet, click the plus (+) icon, then add new drilldown views.

   Note: When you specify multiple drilldown views for a category, the least restrictive view will be chosen for the user.

Repeat this procedure for each index category that you want to define.

Configuring Indexing for Third-Party Search Engines

The following procedure shows you how to configure indexing for third-party search engines.

This task is a step in *Process of Configuring Siebel Search for Third-Party Search Engines*.

To configure indexing for third-party search engines

1. Navigate to Administration - Search screen, then the Search Index Settings view.
2. In the Search Engine applet, navigate to the third-party search engine for which you want to configure indexing.

   For example, navigate to the Elastic SE record.
3. In the Search Categories applet, click New (the plus (+) icon) to add a new search category, and then do the following:

   - In the Category Name field, click the look up icon, select a business component field from the list that appears, and then click OK.
   - Click the Index button.
   - Refresh the page to check the value in the Status Message field. The value in the Status Message field changes as it moves through the following stages: Not Started, Queued, In Progress, Indexed.

   Repeat this step for each category that you want the third-party search engine to index.
4. In the Search Categories applet, drilldown on the indexed search category.
5. Add applications and views to the selected indexed search category as follows:

   a. Select the Applications tab, click New (the plus (+) icon), and then add the application names.
   b. In the Drilldown Views applet, click the plus (+) icon, and then add the drilldown views.

Configuring Incremental Indexing for Third-Party Search Engines

The following procedure shows you how to configure incremental indexing for third-party search engines. Initially a full index of the category (for example Account) is performed, followed subsequently by the incremental indexing.

This task is a step in *Process of Configuring Siebel Search for Third-Party Search Engines*.

To configure incremental indexing for third-party search engines

1. Enable the component groups for incremental indexing as follows:

   a. Navigate to the Administration - Server Configuration screen, then the Component Groups view.
   b. Query for and then enable the following component groups. To enable each component group, select the component, and then click Enable.

      - Search
      - MobileSync
2. Configure the Enable Incremental Indexing system preference as follows:

   a. Navigate to the Administration - Application screen, then the System Preferences view.
   b. Add the Enable Incremental Indexing system preference and set its value to TRUE.
   c. Restart the Siebel server.
3. Add a Job Template as follows:

   a. Navigate to the Administration Server Configuration screen, then the Job Template view.
   b. Add a new job template with the settings shown in the following table.

Field	Description
Name	Search Incremental Indexer
Short Name	SII
Component Name	Search Data Processor
Component Type	BusSvcMgr

c. Set the following job parameters:

Name	Value
Business Service Name	Search Data Processor
Method Name	DoIncrementalIndex

4. Add a new job as follows:

a. Navigate to the Administration - Server Management screen, then the Job view.
b. For the Component Job called Search Incremental Indexer, select the Repeating? check box.
c. Set the following job details as required for the Search Incremental Indexer component job:

- Schedule Start date and time
- Expiration date and time
- Delete Interval
- Delete Unit
- Repeating Information
- Retry Information

d. Set the following job parameters:

Name	Value
Business Service Name	Search Data Processor
Method Name	DoIncrementalIndex

e. Submit the job.

5 Setting Up Siebel Search with Oracle Secure Enterprise Search

Setting Up Siebel Search with Oracle Secure Enterprise Search

This chapter covers setting up Siebel Search with Oracle Secure Enterprise Search. All tasks in this chapter are required for Siebel Search and Oracle Secure Enterprise Search integration. This chapter includes the following topics:

- *About Installing Siebel Search*
- *Installing Oracle Secure Enterprise Search*
- *Creating the Siebel Search Center Directory Structure on the Siebel Server*
- *Configuring EAIFileTransportFolder Access for Siebel Search*
- *Administering FTP Indexing*
- *Configuring Field Mapping Settings*
- *Administering Siebel Server Component Groups*
- *Administering Workflow Management Components*
- *Enabling Search Security Web Service*
- *Activating the Search Engine for Oracle Secure Enterprise Search*
- *Configuring Search Engine Settings for Oracle Secure Enterprise Search*
- *Configuring Oracle Secure Enterprise Search Engine for the Search Results View*
- *Configuring the Default Search Definition*
- *Clearing Attachments From the Shared Search UNC Location*
- *Configuring User Authentication for Search Queries*
- *Activating Search Run-Time Events*
- *Siebel Search Web Services*
- *Process of Setting Up the Business Component Source and Connector*
- *Process of Setting Up the File System Source and Connector*
- *Process of Setting Up the Web Crawler Source and Connector*
- *Process of Setting Up the Database Source and Connector*
- *Process of Setting Up the IMAP Email Source and Connector*
- *Process of Setting Up the Lotus Notes Source and Connector*
- *Administering Connectors for Oracle Secure Enterprise Search Integration*
- *Disconnecting from Oracle Secure Enterprise Search and Deactivating the Identity Manager*
- *Oracle Secure Enterprise Search Changes Required for EAI to Support HTTPS*

About Installing Siebel Search

Siebel Search uses Oracle Secure Enterprise Search as the default search engine. This topic covers installation of Oracle Secure Enterprise Search, and installation of Siebel components related to Search.

Upgrading from Siebel Search Version 7.x

Any custom search objects which were defined in Siebel Search Version 7.x must be redefined in the Application_Suite_OSES_Field-Mappings.xml file. For more information, see *Configuring Index Mappings for Oracle Secure Enterprise Search*.

Installing Server Components for Siebel Search

Siebel Search requires the installation of the Siebel Enterprise Server, including the Siebel Server and the Siebel Gateway, and Oracle Secure Enterprise Search. Oracle Secure Enterprise Search and the Siebel Enterprise Server must be deployed on separate, dedicated servers.



Note: The system requirements and supported platform certifications are available from the Certifications tab on My Oracle Support. For information about Certifications, see article 1492194.1 (Article ID) on My Oracle Support.

The recommended installation and configuration sequence is as follows:

- Install the Siebel Enterprise Server
- Install the Oracle Secure Enterprise Search Server
- Configure Siebel Search on the Oracle Secure Enterprise Search server and Siebel servers.

For information on installing server components, see *Installing Oracle Secure Enterprise Search*.

Oracle Secure Enterprise Search Pre-Installation Tasks

Refer to the Pre-Installation Tasks topic in the *Oracle Secure Enterprise Search Installation and Upgrade Guide*. This guide is provided on Oracle Technology Network.

Installing Oracle Secure Enterprise Search

This topic covers Oracle Secure Enterprise Search installation and additional installation steps required for Siebel Search. Capture the Search and Administration URLs from the Oracle Secure Enterprise Search install wizard during the Oracle Secure Enterprise Search installation process, as these will be required for post-installation verification. The Administration Password will also be required when configuring the Search Engine Settings in the Siebel Search administration view. The examples in this guide use Siebel1 as the Oracle Secure Enterprise Search Administration

Password. Make sure that the file RSS_Crawler_Configuration.xml is accessible to the Oracle Secure Enterprise Search engine and that the file Application_Suite_OSES_Field-Mappings.xml is accessible to the Siebel Server.

To install Oracle Secure Enterprise Search

1. Complete the tasks in the Installation Tasks section of the *Oracle Secure Enterprise Search Installation and Upgrade Guide*. Use the installation values in the following table.

Field	Value
Search Server Name	Set the value to SES.
Administrative Password	Set the value to siebel1.
HTTP Port	The default port can be used.
Destination Path	Set the value to D:\oracle\ses\ses version\OH.
Data Storage Location	Set the value to D:\oracle\ses\ses version\oradata.

2. Create the Siebel Search Center Config directory under the Siebel File System on the Oracle Secure Enterprise Search Server:
   - On Windows create the Config directory at D:\fs\SSC\Config\.
   - On UNIX create the Config directory at /export/home/fs/SSC/Config/.
3. Copy the file RSS_Crawler_Configuration.xml from the Siebel Server to the SSC Config directory on the Oracle Secure Enterprise Search Server:
   - On Windows copy the crawler file from siebsrvr\bin\ on the Siebel Server to D:\fs\SSC\Config/ on the Oracle Secure Enterprise Search Server.
   - On UNIX copy the crawler file from siebsrvr/lib/ on the Siebel Server to /export/home/fs/SSC/Config/ on the Oracle Secure Enterprise Search Server.
4. Set the permissions for fs\SSC\Config\ to Full Control for Everyone.

Creating the Siebel Search Center Directory Structure on the Siebel Server

This topic covers creating the Siebel Search Center directory structure on the Siebel Server for storing the XML feed files and feed status files which are generated at runtime.

This topic includes the following tasks:

- *Creating the Siebel Search Center Directory on Windows*

- *Creating the Siebel Search Center Directory on UNIX*

Creating the Siebel Search Center Directory on Windows

This topic covers creating the Siebel Search Center directory structure on the Siebel Server for a Windows environment. The D:\fs\SSC directory on the Siebel Server will also be used as the FTP home directory.

To create the Siebel Search Center directory structure on Windows

1. Create a directory for storing the XML feed files on the Siebel Server, for example, D:\fs\SSC\xmlidata.

   The XML feed files are generated at runtime and temporarily stored in the fs\SSC\xmlidata folder. The feed files are automatically deleted once indexing completes.
2. Create a directory for storing the XML feed status files on the Siebel Server, for example, D:\fs\SSC\xmlidata \err.

   The XML feed status files are generated at run time, and indicate the error or success status of the crawl operation.
3. Create a directory for storing the XML field mapping file on the Siebel Server, for example, D:\fs\SSC\Config.
4. Copy the file Application_Suite_OSES_Field-Mappings.xml from the installation directory at siebsrvr\bin\ to the config directory at D:\fs\SSC\Config\.
   - Copy the file SSC_OSES_Field-Mappings.xml if you are using a Siebel application that operates across industries, such as Siebel Call Center, Siebel Sales or Siebel Marketing.
   - Copy the file SIA_OSES_Field-Mappings.xml if you are using a Siebel industry application, such as Siebel Finance, Siebel Medical, or Siebel Pharma.
5. Copy the file Search_Engine_Config.xml from the installation directory to the config directory at D:\fs\SSC \Config\.

   Note: Do not modify the contents of the file Search_Engine_Config.xml from the preconfigured settings.
6. Set the permissions for D:\fs\ to Full Control for Everyone.

Creating the Siebel Search Center Directory on UNIX

This topic covers creating the Siebel Search Center directory structure on the Siebel Server for a UNIX environment.

To create the Siebel Search Center directory structure on UNIX

1. Create a directory for storing the XML feed files on the Siebel Server, for example, /export/home/fs/SSC/ xmlidata.

   The XML feed files are generated at runtime and temporarily stored in the fs/SSC/xmlidata folder. The feed files are automatically deleted once indexing completes.
2. Create a directory for storing the XML feed status files on the Siebel Server, for example,

   /export/home/fs/SSC/xmlidata/err.

   The XML feed status files are generated at runtime, and indicate the error or success status of the crawl operation.

3. Create a directory for storing the XML field mapping file on the Siebel Server, for example:

   /export/home/fs/SSC/Config.
4. Copy the file Application_Suite_OSES_Field-Mappings.xml from the installation directory at siebsrvr/lib/ to the config directory at /export/home/fs/SSC/Config/.
   - Copy the file SSC_OSES_Field-Mappings.xml if you are using a Siebel application that operates across industries, such as Siebel Call Center, Siebel Sales or Siebel Marketing.
   - Copy the file SIA_OSES_Field-Mappings.xml if you are using a Siebel industry application, such as Siebel Finance, Siebel Medical, or Siebel Pharma.
5. Copy the file Search_Engine_Config.xml from the installation directory to the config directory at /export/home/fs/SSC/Config/.

   Note: Do not modify the contents of the file Search_Engine_Config.xml from the preconfigured settings.
6. Set the permissions for /export/home/fs/ to Full Control for Everyone.

Configuring EAIFileTransportFolder Access for Siebel Search

The EAIFileTransportFolders parameter must be configured to grant write access to specific folders within the Siebel file system that are required for Siebel Search. For information on configuring the EAIFileTransportFolders parameter, see *Transports and Interfaces: Siebel Enterprise Application Integration*.

Administering FTP Indexing

Siebel supports FTP connections with Oracle Secure Enterprise Search. This topic includes information about the following:

- *Enabling FTP Indexing*
- *Configuring the FTP Server for FTP Indexing*
- *Configuring the RSS Crawler for FTP Indexing*
- *Creating Server Repeating Jobs for Incremental Indexing*
- *Configuring Field Mapping Settings*

Note: From Siebel Innovation Pack 2016 onwards, URL credentials are disabled. As a result, HTTP indexing is not supported by Oracle Secure Enterprise Search. Only FTP indexing is supported.

Enabling FTP Indexing

Siebel Search provides an FTP option for indexing. The FTP indexing method uses a type of feed. The feed is defined as the collection of documents in the data repository for the index operation. FTP indexing uses the following feed type:

- FTP indexing using directory feed. All feeds are placed in a directory, and this directory is the input to the connector. The directory feed location is configured in the file RSS_Crawler_Configuration.xml. Directory feed is useful when the data feeds are available in a single directory. The number of documents in each directory must be less than 10,000.

To enable FTP indexing for Oracle Secure Enterprise Search

1. Navigate to the Administration - Search OSES screen, then the Search Engine Settings view.
2. Configure the Send Index Feed Via HTTP settings as follows:
    - Set the value to False to turn on FTP indexing.

      The default value is False.

For information on configuring search engine settings for FTP indexing, see *Configuring Search Engine Settings for Oracle Secure Enterprise Search*.

Configuring the FTP Server for FTP Indexing

Siebel Search uses an Oracle Secure Enterprise Search XML framework for submitting records for indexing in the form of XML feeds. The pre-indexed XML feed files are stored on an FTP server for Oracle Secure Enterprise Search access. The FTP server and Siebel Server must be colocated on the same server—all examples in this guide assume that the FTP server and Siebel Server are colocated. Accessing the feeds over FTP is a crawl time operation requiring administrative privileges. The FTP location is not accessed at search time, therefore there is no end user access to the FTP location.

This topic includes the following tasks:

- *Configuring the Search FTP Server on Windows*
- *Configuring the Search FTP Server on UNIX*

Configuring the Search FTP Server on Windows

This topic covers configuring the FTP server on Windows, so that Oracle Secure Enterprise Search can access the Siebel Search XML feed files for crawling and indexing operations. The FTP home directory is set to the Siebel Search Center directory. For more information on setting up the FTP server, see your operating system documentation on Internet Information Services.

To configure the Search FTP server on Windows

1. From the Start menu choose Control Panel, Add or Remove Programs, and then the Add/Remove Windows Components option.
2. From the Windows Components list choose Application Server, Details, Internet Information Services (IIS), and then Details.
3. Select File Transfer Protocol (FTP) Service and click OK.
4. Click Next on Windows Components Wizard.

   This will install the IIS and FTP services.
5. From the Start menu choose All Programs, Administrative Tools, and then Internet Information Services.

The Internet Information Services (IIS) console is launched.

6. Right-click on Default FTP Site and select Properties.
7. Select the FTP Site tab.
8. Enter Siebel Search Center FTP Site in the Description field.
9. Select the Home Directory tab.
10. Select the option Directory Located on this Computer.
11. Set the Home Directory Local Path to D:\fs\SSC.

    The paths in the RSS Crawler file are configured relative to your FTP Home Directory.
12. Select the options Read, Write and Log visits.
13. Set Directory Listing Style to UNIX.

Configuring the Search FTP Server on UNIX

This topic covers configuring the FTP server on UNIX, so that Oracle Secure Enterprise Search can access the Siebel Search XML feed files for crawling and indexing operations.

To configure the Search FTP server on UNIX

1. Enable the FTP service on the Siebel Server.
2. Set the FTP home directory to /export/home/fs/SSC.

   The paths in the RSS Crawler file are configured relative to your FTP home directory.

Configuring the RSS Crawler for FTP Indexing

Oracle Secure Enterprise Search crawls Siebel data in RSS feed format. The file RSS_Crawler_Configuration.xml is located on the Oracle Secure Enterprise Search Server and is used to configure the Oracle Secure Enterprise Search Crawler. The path to this configuration file must be specified when creating the Siebel Source in Oracle Secure format. The fileRSS_Crawler_Configuration.xml is located on the Oracle Secure Enterprise Search Server and is used to configure the Oracle Secure Enterprise Search Crawler. The path to this configuration file must be specified when creating the Siebel Source in Oracle Secure Enterprise Search. Siebel Search uses the directory feed type for indexing over FTP.

To configure the RSS Crawler for FTP indexing on Oracle Secure Enterprise Search Server

1. Open the file RSS_Crawler_Configuration.xml on the Oracle Secure Enterprise Search server in an XML or text editor:
   - On Windows this file is located at D:\fs\SSC\Config\.
   - On UNIX this file is located at /export/home/fs/SSC/Config/.
2. Complete the mandatory fields in the Siebel Customer configuration section - these fields are described in the following table.

Field	Description	Mandatory
feedLocation	The xmlidata\(XML-based indexable data) directory location on the FTP Server, where the XML-based feed files are stored for indexing. This	Yes

Field	Description	Mandatory
	value is specified relative to your FTP Home Directory, for example, if your FTP Home Directory is set to D:\fs\SSC and the xmlidata folder is at D:\fs\SSC\xmlidata, then set the feedLocation value to ftp://Siebel_Server_IP_Address/xmlidata. On Windows this value is specified in the format: `ftp://Siebel_Server_IP_Address/xmlidata` On UNIX this value is specified in the format: `ftp://Siebel_Server_IP_Address/xmlidata` **Note:** FTP must be included in the feedLocation value.	
feedType	Type of feed file. Set the value to directoryFeed.	Yes
errorFileLocation	Location on the FTP Server where the FileName.err and FileName.suc files will be stored. This value is specified relative to your FTP Home Directory On Windows and UNIX the value is specified in the format: `/xmlidata/err` **Note:** FTP is not included in the errorFileLocation value.	No
securityType	Type of security to be enabled. Set the value to attributeBased.	Yes
sourceName	Name of the Siebel data source. Set the value to buscomp.	Yes
securityAttribute	Attribute in the feed files that provides the security information. Set the value to sblvisibilityid. Multiple access control mappings for sblvisibilityid can be passed to SES at index-time.	Yes
Grant	This attribute governs the Siebel user's access to a set of result records. Set the value to True. The Siebel user will have access to the records with Visibility IDs set up for that user. The Visibility ID for each record is set in the XML feed that is generated by Siebel Search for Oracle Secure Enterprise Search to crawl. The set of Visibility IDs accessible to a user is retrieved by Oracle Secure Enterprise Search from Siebel CRM through the Siebel Web service, when the user logs in to Oracle Secure Enterprise Search.	No

Field	Description	Mandatory

Example of Configuring the RSS Crawler for FTP Indexing

This extract provides an example of configuring the file RSS_Crawler_Configuration.xml for FTP indexing.

```
<feedLocation>ftp://Siebel_Server_IP_Address/xmlidata</feedLocation>
<feedType>directoryFeed</feedType>
<errorFileLocation>/xmlidata/err</errorFileLocation>
<securityType>attributeBased</securityType>
<sourceName>buscomp</sourceName>
<securityAttribute name="sblvisibilityid" grant="true"/>
```

Creating Server Repeating Jobs for Incremental Indexing

This topic covers creating server repeating jobs to enable incremental indexing. Incremental indexing enables the index to automatically update, at preconfigured intervals, with create, update and delete operations that have been executed on the data source since the last index update. It provides a more efficient method of updating the index without the overhead of a full Refresh Index operation. Incremental indexing is supported for thin clients. Refresh indexing must be used on thick clients.

When importing a batch of data, it is recommended that incremental indexing is turned off and a one time Index All operation is performed. Incremental indexing is turned off by deactivating the Update Index action set on the Runtime Events Action Set view. For more information on server component repeating jobs, see *Siebel System Administration Guide*.

Note: This task is required only for thin client deployments.

To create server repeating jobs for incremental indexing

1. Navigate to the Administration - Server Configuration screen, then the Job Templates view.
2. In the Jobs Templates list, click New.
3. Set the Name to Search Incremental Indexer.
4. Set the Short Name to SII.
5. In the Component/Job field, click the list and select the SearchDataProcessor server component.
6. In the Job Parameters list, add the following two parameters for the component job.

Name	Value
Business Service Name	Search Data Processor
Method Name	CreateIncrementalIndex

Configuring Field Mapping Settings

The settings enclosed in percentages in the field mapping file must be configured for integration between Siebel Search and Oracle Secure Enterprise Search. There are two mapping files and the correct one to use is as follows:

- Use the file SSC_OSES_Field-Mappings.xml if you are using a Siebel application that operates across industries, such as Siebel Call Center, Siebel Sales or Siebel Marketing.
- Use the file SIA_OSES_Field-Mappings.xml if you are using a Siebel industry application, such as Siebel Finance, Siebel Medical, or Siebel Pharma.

To configure field mapping settings

1. Open the file `Application_Suite_OSES_Field-Mappings.xml`, located on the Siebel Server, in an XML or text editor.
    - On Windows this file is located at `D:\fs\SSC\Config\`.
    - On UNIX this file is located at `/export/home/fs/SSC/Config/`.
2. Configure all fields enclosed in the percentage symbol. The fields are described in the following table.

Field	Description
%webserver%	Set the value to the `ApplicationInterfaceHost:HTTPSPort_Number` of the Siebel Web server.
%objmgr%	This is the application object manager. Set the value to the application that is running. For example, `CallCenter/<lang> or Fins/<lang>`.
%lang%	Set the value to the language for which the Siebel application is configured. For example, the value for English is enu.
%hostName%	Set the value to the IP address of the Siebel host.

Administering Siebel Server Component Groups

This procedure enables the Enterprise Application Integration (alias EAI) and Search Processing server component groups. These two component groups must be enabled for all indexing operations. The Search Data Processor component processes Search data and builds the index. Once the Search server is set up and the indexes have been defined, the components must be synchronized. For more information on Siebel Server component groups, see *Siebel System Administration Guide*.

To administer Siebel Server component groups

1. Navigate to the Administration - Server Configuration screen, and then the Component Groups view.
2. Query on the Search Processing component group.
3. On the Component Groups applet, click the Enable button.
4. Query on the Enterprise Application Integration component group.
5. On the Component Groups applet, click the Enable button.
6. Restart the Siebel Server.
7. Navigate to Administration - Server Management screen, then the Servers and Component Groups view.
8. Make sure that the Search Processing and Enterprise Application Integration component groups have state Online.
9. Navigate to Administration - Server Configuration screen, then the Enterprises and Synchronize view.
10. Query on the Search Data Processor component in the list applet.
11. Click Synchronize.
12. Restart the Siebel Server.

Administering Workflow Management Components

This topic covers enabling the Workflow Management Server components. All Workflow Management components must be enabled for incremental and refresh indexing. For more information on Siebel Server component groups, see *Siebel System Administration Guide*.

To administer Workflow Management Components for incremental and refresh indexing

1. Navigate to Administration - Server Configuration screen, and then the Component Groups view.
2. Query on the Workflow Management component group.
3. On the Component Groups applet, click the Enable button.
4. Restart the Siebel Server.
5. Navigate to Administration - Server Management screen, then the Enterprises, Servers and Components view.
6. Query on each of the following Workflow Management components and verify that the State of each is Online:
    - Workflow Action Agent
    - Workflow Monitor Agent
    - Workflow Process Batch Manager
    - Workflow Process Manager
    - Workflow Recovery Manager
    - Generate Triggers
7. Click the Startup button for any Workflow Management component that is not online.

Enabling Search Security Web Service

This topic covers enabling the SearchSecurityService inbound Web service for integration with Oracle Secure Enterprise Search. This Web service uses SOAP header authentication.

To enable security for search inbound Web services

1. Navigate to Administration - Web Services screen, and then the Inbound Web Services view.
2. Click on the Query button on the Inbound Web Services applet.
3. Enter SearchSecurityService in the Name field and click Go.
4. On the Address field of the Service Ports applet, substitute the address variables in the following URL:

   ```
   https://<ApplicationInterfaceHost>:<httpsPort>/siebel/app/<ApplicationName>/<language>
   ```

   a. Substitute <ApplicationInterfaceHost> with the Siebel Application Interface hostname.
   b. Substitute <httpsPort> with the port number where the application interface is configured to run.
   c. Substitute <ApplicationName> with the name of the Siebel application. For example: callcenter.
   d. Substitute <language> with the Siebel application language. For example: enu.
5. On the Service Ports applet select Menu, and then the Save Record menu item.
6. Click the Clear Cache button on the Inbound Web Services applet.

Activating the Search Engine for Oracle Secure Enterprise Search

A search engine is activated by selecting the Default Flag option in the Search Engine Settings view. Only one search engine can be activated at any time. Make sure that the Default Flag option is selected for just one search engine.

To activate the search engine for Oracle Secure Enterprise Search

1. Navigate to Administration - Search OSES screen, then the Search Engine Settings view.
2. In the Search Engines applet, select the Default Flag option for Oracle Secure Enterprise Search.

Configuring Search Engine Settings for Oracle Secure Enterprise Search

This topic covers configuration of the Oracle Secure Enterprise Search and Siebel Search integration fields in the Search Engine Settings view of the Siebel Search Administration UI.

To configure the search engine settings for Oracle Secure Enterprise Search

1. Navigate to the Administration - Search OSES screen, then the Search Engine Settings view.
2. Change the version number of the OSES search engine from 10.1.8 to 11.2.2.2.0.

   The version number for the OSES search engine is 10.1.8 by default but if you are using Oracle Secure Enterprise Search version 11.2.2.2, then you must update the version number of the OSES search engine to 11.2.2.2.0.
3. In the Driver Parameters applet, complete the search engine settings described in the following table as required.

Setting	Description
Admin API Namespace	The Namespace for the OracleSearchAdminService Web service. This Oracle Secure Enterprise Search Web service invokes the Oracle Secure Enterprise Search Schedule that crawls and indexes the Siebel business component data. o For Oracle Secure Enterprise Search version 11.2.2.2, set the value to: **`http://search.oracle.com/Admin`** o For Oracle Secure Enterprise Search version 11.1.2 or earlier, set the value to: **`http://search.oracle.com/AdminService/2006-09-15`**
Admin API Webserver Address	The Web server address for the Oracle Secure Enterprise Search OracleSearchAdminService Web service. o For Oracle Secure Enterprise Search version 11.2.2.2, set the value to: **`http://SES_Server:Port/search/api/admin/AdminService`** o For Oracle Secure Enterprise Search version 11.1.2 or earlier, set the value to: **`http://SES_Server:Port/search/ws/admin/SearchAdmin`**
Advanced Batching And Indexing	This setting is used to turn the asynchronous indexing and index monitoring features on or off: o Set the value to True to enable the asynchronous indexing and index monitoring features. o Set the value to False to disable the asynchronous indexing and index monitoring features. The default value is True.

Setting	Description
Batch Split Size	The number of business component records in a batch. The Object Manager query performance, search engine footprint size, and Siebel Server specification are used in determining optimum Batch Split Size. Set the value to the following: ○ For FTP indexing, set the value to less than or equal to 4500.
Batch Submit Size	The number of records submitted at a time for indexing. The Object Manager query performance, search engine footprint size, and Siebel Server specification are used in determining optimum Batch Submit Size. Set the value to the following: ○ For FTP indexing, set the value to less than or equal to 1500.
Dupmarked	This functionality is not supported. Set the value to false. **Note:** This setting is case sensitive.
Dupremoved	This is a Boolean setting to enable or disable the removal of duplicates from the result set. Set the value to true to remove duplicates from the results. **Note:** This setting is case sensitive.
Feed Access Password	This is the password for accessing the RSS feeds that Oracle Secure Enterprise Search will crawl. ○ For FTP indexing, set the value to the password used to log in to the FTP server where the XML feed files are generated. Feed Access User ID is set in the Search Connector Settings view.
Filename	The path to the Application_Suite _OSES_Field-Mappings.xml file on the Siebel Server. ○ Use the file SSC_OSES_Field-Mappings.xml if you are using a Siebel application that operates across industries, such as Siebel Call Center, Siebel Sales or Siebel Marketing. ○ Use the file SIA_OSES_Field-Mappings.xml if you are using a Siebel industry application, such as Siebel Finance, Siebel Medical, or Siebel Pharma. This file is located on the Siebel Server in the \fs\SSC\Config directory.
Login URL	The administration URL for Oracle Secure Enterprise Search. The URL format is: `http://SES_Server:HTTP_Port/search/admin/control/login.jsp`

Setting	Description
Namespace	The name of the Oracle Secure Enterprise Search Web service. Set the value to OracleSearchService.
OSESAutoStartSchedule	This setting is used to turn automatic Oracle Secure Enterprise Search scheduling on or off. o Set the value to True to enable automatic scheduling of the index operation in Oracle Secure Enterprise Search. The schedule is automatically started once Siebel Search generates the feed files. o Set the value to False to disable automatic scheduling of the index operation. This option requires manually starting the indexing schedule in Oracle Secure Enterprise Search. The default value is True.
Password	This is the Oracle Secure Enterprise Search Administration User Password. Example passwords for Oracle Secure Enterprise Search follow: o For version 11.2.2.2: Welcome1. o For version 11.1.2 or earlier: siebel1. For more information, see *Installing Oracle Secure Enterprise Search*.
Recordcount	This setting configures the inclusion of an estimate in the result for the number of records in the result set. Set the value to True.
Remote Admin Support	This setting is used to turn the remote administration feature for the Oracle Secure Enterprise Search Connector on or off: o Set the value to True to enable the remote administration feature. o Set the value to False to disable the remote administration feature. The default value is True.
Schedule Name	This is used for starting the Oracle Secure Enterprise Search Schedule remotely. This field takes the same value as the Business Component Connector Library Name, and is set to buscomp. This value is case sensitive.
Schedule URL	Oracle Secure Enterprise Search schedule URL for starting the crawler remotely using the Oracle Secure Enterprise Search HTTP API. Set the value to `http://SES_Server:HTTP_Port/search/admin/schedules/schedules.jsp` The Oracle Secure Enterprise Search Server can be specified using either the DNS name or IP address.

Setting	Description
Search Engine Config Filename	The path to the search engine configuration file on the Siebel server. The value is set to: `\\SearchServer\fs\SSC\config\Search_Engine_Config.xml` Note that \fs refers to the FTP path.
Send Index Feed Via HTTP	This setting is used to turn FTP indexing on or off: o Set the value to False to turn on FTP indexing. o Set the value to True to turn on HTTP indexing. The default value is False.
SES Username	This is the unique User ID which Siebel Search uses to access the application for the search operation. This value corresponds to the Entity Name which is set when creating the Oracle Secure Enterprise Search Federation Trusted Entities. The examples in this guide use sblsesuser as the Oracle Secure Enterprise Search Username/Entity Name. For more information, see *Verifying Oracle Secure Enterprise Search Federated Trusted Entities and Siebel Identity Plugin Manager*.
SES Password	This is the password which Siebel Search uses to access the application for the search operation. This value corresponds to the Entity Password which is set when creating the Oracle Secure Enterprise Search Federation Trusted Entities. Examples for the Oracle Secure Enterprise Search Password/Entity Password follow: o For Oracle Secure Enterprise Search version 11.2.2.2: Welcome1. o For Oracle Secure Enterprise Search version 11.1.2 or earlier: Welcome. For more information, see *Verifying Oracle Secure Enterprise Search Federated Trusted Entities and Siebel Identity Plugin Manager*.

Shared Search UNC Location	This setting is specific to FTP indexing. The value is set to the Siebel Search Center shared FTP UNC location where Siebel Search decompresses the Siebel File System files. It is the parent directory of the Xmlidata directory.
	
	o The address format on Windows is:
	
	`\\IP address\fs\SSC`
	
	o The address format on UNIX is:
	
	`/export/home/qa/fs/SSC`

Setting	Description
	Note: Adding a slash (/) or backslash (\) after SSC will create an error.
SSC FTP Location	This setting is specific to FTP indexing. The value is set to the FTP Server shared search center location from where Oracle Secure Enterprise Search reads the Siebel File System files. The FTP Home directory is configured on the FTP server. The value must be set to: `ftp://Siebel_Server_IP_Address/`
Strong Password Encryption Rules Enforced	This setting is used to turn the enhanced security features on or off: o Set the value to True to enable the enhanced security features. The default value is True. o Set the value to False to disable the enhanced security features. The default value is True.
Username	This is the Oracle Secure Enterprise Search Administration User ID. o For Oracle Secure Enterprise Search version 11.2.2.2, the default value is searchsys. o For Oracle Secure Enterprise Search version 11.1.2 or earlier, the default value is eqsys.
Visibility Support	This setting is used to turn enhanced access control functionality on or off: o Set the value to True to enable the enhanced access control feature. o Set the value to False to disable the enhanced access control feature. The default value is True.
Web Service Endpoint Address	This is the Siebel authentication and validation Web service endpoint. Set the value to: `http://<SiebelWebServer.com>:<Port>/siebel/app/<ApplicationName>/<language>` This value can be copied from where it was configured in the Inbound Web Services view of the iebel administration UI, removing the username and password from the URL. For more nformation, see *Enabling Search Security Web Service*.
Web Service Endpoint Password	This is the Siebel administrative User Password. This value is used by Oracle Secure Enterprise Search when connecting to the Siebel server and authenticating the connection.
Web Service Endpoint Username	This is the Siebel administrative User ID. This value is used by Oracle Secure Enterprise Search when connecting to the Siebel server and authenticating the connection.

Setting	Description
WebServer Address	URL for the Oracle Search Service. The address format is: `http://SES_Server:HTTP_Port/search/query/OracleSearch`
XML Indexable Data Location	This setting is specific to FTP indexing. Set the value to the Siebel Search Center shared FTP location for storing data for the RSS crawler to access and index. o The path format on Windows is: \\IP address\fs\SSC\xmlidata\ o The path format on UNIX is: /home/export/fs/SSC/xmlidata/

4. Select Save Record on the list applet.

Note: The Siebel Server must be restarted every time a change is made to Search Engine Settings configuration.

Configuring Oracle Secure Enterprise Search Engine for the Search Results View

After installing Oracle Secure Enterprise Search, activating the search engine and configuring the search engine settings for Oracle Secure Enterprise Search, you must configure the Oracle Secure Enterprise Search engine for the Search Results View as follows:

- Enable or disable Oracle Secure Enterprise Search so that it appears or is hidden in the Search Results view.
- Configure the position of the Oracle Secure Enterprise Search tab in the Search Results view.
- Enable or disable the auto suggest feature for the Oracle Secure Enterprise Search engine.

Note: This procedure applies to both new customers setting up Oracle Secure Enterprise Search for the first time and customers upgrading to the latest release of Oracle Secure Enterprise Search.

Search results are displayed in the Search Results view. In the Search Results view, when you drill down on a record to see the detailed record information, the search results are retained. This mode of display is known as Results Retention Mode. Preview and Attach features are available in Results Retention Mode.

To configure the Oracle Search Enterprise Search engine for the Search Results view

1. Navigate to the Administration - Search screen, then the Search Engine Settings view.

2. In the Search Engines applet, add a new record for OSES (if not already present) with the values shown in the following table.

Field	Description	Value
Engine Name	Name of the search engine, which appears as the tab display name in the Search Results view.	OSES
Search Adapter	Name of the search adapter, which maps to the search engine configured.	OSES Search Adapter Service
Sequence Number	Indicates the position where the <SearchEngineName> tab will appear in the Search Results view. For example, 1 indicates the first position and so on.	3
Active	Indicates whether to show (Y) or hide (N) the <SearchEngineName> tab in the Search Results view.	Y
Auto Suggest Supported	Indicates whether to enable (Y) or disable (N) the auto suggest feature for search.	Y

Configuring the Default Search Definition

The list of Categories displayed in the Search Index Settings view is determined by the default Search Definition in the Search Definition view. Each Siebel application is mapped to a Search Definition. Before indexing business components or configuring Search Categories in the Search Index Settings view for a particular application, the corresponding Search Definition must be set up as the default Definition in the Search Definition view. For more information on Search Definition and Siebel application mappings, see *Application and Search Definition Mappings*.

To configure the default search definition for Oracle Secure Enterprise Search

1. Navigate to the Administration - Search OSES screen, then the Search Definition view.
2. Select the Search Definition that is to be set as the default.
3. Select the Default Flg option.

Clearing Attachments From the Shared Search UNC Location

Attachments are crawled by Oracle Secure Enterprise Search. In order for Oracle Secure Enterprise Search to remove attachments from the temporary Shared Search UNC Location, the Delete Linked Documents search engine setting must be set to True in the source configuration. Delete Linked Documents is set to False by default.

To clear attachments from the Shared Search UNC Location

1. Navigate to the Administration - Search OSES screen, then the Search Engine Settings view.
2. In the Search Engines applet, select the OSES search engine.
3. In the Driver Parameters applet, change the default value for Delete Linked Documents from False to True.

Configuring User Authentication for Search Queries

This topic describes configuring end user authentication for search queries. To require user login for secure content, configure the Login Requirement value in Oracle Secure Enterprise Search.

To configure user authentication for search queries

1. Log in to the Oracle Secure Enterprise Search Administration application.
2. Navigate to the Global Settings screen, then the Query Configuration view.
3. Set the Login Requirement value to one of the following options:
    - Require login for secure content only. This is the default. Users can search public content without logging in, but they must log in to retrieve secure content.
    - Require login for public and secure content. Users must first log in to retrieve any content.

Activating Search Run-Time Events

Activating preconfigured Search run-time events is required to enable incremental indexing and refresh indexing. This task is required for both thick and thin clients. Search runtime events monitor create, update and delete events executed on Search Objects in the data repository. The Action Sets create records in the transaction table (S_SRCH_CHG_TXN) and trigger the Search Content business service method UpdateIndex.

To activate the Search run-time events

1. Navigate to the Administration - Runtime Events screen, then the Action Sets view.
2. Query on the Update Index Action Set.
3. Select the Active and Enable Export options to activate the Update Index run-time events.

Siebel Search Web Services

Siebel Search provides a set of Business Service APIs, which can be implemented as Web services through the Siebel Web services framework. The following Search Web services are provided:

- SearchExternalService. This Web service can be used as a Search Front End Web service, to facilitate searches on the data stored in the Siebel application, from a non-Siebel Web application.
- SearchSolutionService. This Web service can be used to search for solutions based on user inputs, and retrieve a solution as a search result.
- RetrieveAttachmentService. This Web service has one standard QueryPage method to retrieve attachment documents.
- ProductSearchService. Business Service (Search Product Service) for searching product business components, and performing eligibility checks.

For more information on Siebel Search Web services, see *Siebel CRM Web Services Reference*.

Process of Setting Up the Business Component Source and Connector

The business component source and connector must be set up to integrate Siebel Search and Oracle Secure Enterprise Search.

To set up the business component source and connector for integration with Oracle Secure Enterprise Search, perform the following tasks:

- *Configuring the Siebel Business Component Connector*
- *Activating the Siebel Identity Plugin Manager for Oracle Secure Enterprise Search*
- *Verifying Oracle Secure Enterprise Search Federated Trusted Entities and Siebel Identity Plugin Manager*
- *Deploying the Business Component Source*
- *Verifying the Oracle Secure Enterprise Search Source for the Business Component Connector*

Configuring the Siebel Business Component Connector

This topic covers configuration of the business component connector settings for integration with Oracle Secure Enterprise Search.

This task is a step in *Process of Setting Up the Business Component Source and Connector*.

To configure the Siebel business component connector settings for Oracle Secure Enterprise Search

1. Navigate to the Administration - Search OSES screen, then the Search Connector Settings view.

   The Search Connector Settings List applet is displayed.

2. Complete the business component connector fields described in the following table as required. Values are case-sensitive.

Field	Value
Name	This field is preconfigured and takes the value Bus Comp. Do not change the preconfigured value.
Library Name	This field is preconfigured and takes the value buscomp. Do not change the preconfigured value.
Engine Name	This field is preconfigured and takes the value OSES. Do not change the preconfigured value.
Configuration URL	This is the file URL of the crawler configuration file. Set the value to the location of the RSS_Crawler_Configuration.xml file on the Oracle Secure Enterprise Search server. o On Windows set the value to: **file://localhost/fs/SSC/config** /RSS_Crawler_Configuration.xml o On UNIX set the value to: **file://localhost//export/home/fs/SSC/config/RSS_Crawler_Configuration.xml**
Feed Access User ID	This is the User ID for accessing the RSS feeds that Oracle Secure Enterprise Search will crawl. o For FTP indexing, set the value to the User ID used to log into the FTP server where the XML feed files are generated. If the server has user accounts registered in multiple domains, then use the format Domain\UserID. Feed Access Password is set in the Search Engine Settings view.
Scratch Directory	Create a Temp/ local directory on the Oracle Secure Enterprise Search server where status files can be temporarily written.
Type	Set the value to buscomp. This value is case sensitive.
className	This field is preconfigured and takes the value oracle.search.plugin.security.auth.siebel.SiebelAuthManager. Do not change the preconfigured value.
jarFile	This field is preconfigured and takes the following value:

Field	Value
	`/oracleapplications/Siebel8Crawler.jar` Do not change the preconfigured value.

Activating the Siebel Identity Plugin Manager for Oracle Secure Enterprise Search

The Oracle Secure Enterprise Search Federation Trusted Entities and Siebel Identity Plugin Manager are activated remotely when the Siebel SES adapter connects to Oracle Secure Enterprise Search.

This task is a step in *Process of Setting Up the Business Component Source and Connector*.

To activate the Siebel Identity Plugin Manager for Oracle Secure Enterprise Search

1. Navigate to the Administration - Search OSES screen, then the Search Engine Settings view.
2. Select the CSSOSESAdapter search engine library, and click Connect.

   The Connected flag in the Search Engine Settings view is set to true.

Verifying Oracle Secure Enterprise Search Federated Trusted Entities and Siebel Identity Plugin Manager

This task covers verification of the Federation Trusted Entities settings, and configuration and activation of the Identity Plugin Manager. It is recommended to execute this task if the status of the `cssosESAdapter` search engine library does not update correctly after the Connect operation, or if the error message “Error in RemoteAdmin Adapter" is displayed.

This task is a step in *Process of Setting Up the Business Component Source and Connector*.

To verify Federated Trusted Entities and the Siebel Plugin Manager

1. Log in to the Oracle Secure Enterprise Search Administration application.
2. Navigate to the Global Settings screen, then the Federation Trusted Entities view.
3. Verify the fields described in the following table.

Field	Description
Key	Siebel Search uses this value to access the application for the search operation. Verify that the value is set to **`sblsesuser`**. This value corresponds to the Oracle Secure Enterprise Search Username configured in the Siebel Search Engine Settings view. This value also corresponds to the Entity Name in the Key column of the Oracle Secure Enterprise Search Trusted Entities table. For more information, see *Configuring Search Engine Settings for Oracle Secure Enterprise Search*.

Field	Description
Description	Verify that the description is set to Trusted Siebel-Oracle Secure Enterprise Search user.
Authentication	Verify that the value is set to Password.
Authentication Attribute	This field is not used for Siebel Search integration and is empty.

4. Navigate to the Global Settings screen, then the Identity Management Setup view.
5. Verify that the `oracle.search.plugin.security.identity.siebel.SiebelIdentityPluginMgr` Identity Plugin Manager is listed as an active plug-in.
6. Verify the Authorization Manager plugin fields described in the following table.

Field	Description
Siebel 8 authentication web service endpoint	This is the Siebel authentication Web service endpoint. Verify that the value is set to the following: `http://<webserver>/eai_<language>/start.swe?SWEExtSource=WebService&SWEExtCmd=Execute&WSSOAP=1` For more information, see *Enabling Search Security Web Service*.
Siebel 8 validation web service endpoint	This is the Siebel user validation Web service endpoint. Verify that the value is set to the following: `http://<webserver>/eai_<language>/start.swe?SWEExtSource=WebService&SWEExtCmd=Execute&WSSOAP=1` For more information, see *Enabling Search Security Web Service*.
User ID	This is the Siebel administrative user ID.
Password	This is the Siebel administrative password.

Deploying the Business Component Source

This topic covers remote administration of the Oracle Secure Enterprise Search Connector. This task configures the Oracle Secure Enterprise Search business component Source and Source Group, and creates the Oracle Secure Enterprise Search business component Schedule.

This task is a step in *Process of Setting Up the Business Component Source and Connector*.

To deploy the business component Source for Oracle Secure Enterprise Search

1. Navigate to the Administration - Search OSES screen, then the Search Connector Settings view. The Search Connector Settings List applet is displayed.
2. Select Bus. Comp Connector and click Create Source.

   The Deployed Flag field is automatically selected when the business component source has been deployed.

Verifying the Oracle Secure Enterprise Search Source for the Business Component Connector

This topic covers verification of the Oracle Secure Enterprise Search Source to integrate with the Siebel Search business component connector. It is recommended to execute this task if the status of the business component connector does not update correctly after the Deploy operation, or if the error message “Error in RemoteAdmin Adapter" is displayed.

This task is a step in *Process of Setting Up the Business Component Source and Connector*.

To verify the Oracle Secure Enterprise Search Source for the business component connector

1. Start the Oracle Secure Enterprise Search Administration application.
2. Navigate to the Sources screen.
3. Select the Edit option for the buscomp Source.

   The Source Configuration tab is displayed for the buscomp Source.
4. Verify the Source fields and values against the following table.

Field	Description
Source Name	Verify that the value is set to buscomp. This value corresponds to the buscomp connector library name in the Siebel Search Connector Settings view. **Note:** This value is case sensitive.
Configuration URL	This is the file URL of the configuration file. Verify that the value is set to the location of the RSS_Crawler_Configuration.xml file on the Oracle Secure Enterprise Search server. ○ On Windows the value is set to: `file://localhost/fs/SSC/config/RSS_Crawler_Configuration.xml` ○ On UNIX the value is set to:

Field	Description
	`file://localhost//export/home/fs/SSC/config/RSS_Crawler_Configuration.xml`
Authentication Type	This field is not supported. The value must be empty.
User ID	This setting corresponds to, and takes the same value as, the business component connector Feed Access User ID field. For more information, see *Configuring the Siebel Business Component Connector*.
Password	This setting corresponds to, and takes the same value as, the business component connector Feed Access Password field. For more information, see *Configuring the Siebel Business Component Connector*.
Realm	This field is not supported for Siebel Search and Oracle Secure Enterprise Search integration. Verify that this field is empty.
Scratch Directory	This value points to a Temp/ local directory on the Oracle Secure Enterprise Search server where status files can be temporarily written.
Max. no. of connection attempts	This is the maximum number of connection attempts to access the data feed or upload the status feed. Verify that the value is set to 3.

5. Select the Authorization tab.
6. Verify that Crawl-time ACL Stamping is set to ACLs Controlled by the Source.
7. Verify the Authorization Manager fields and values against the following table

Field	Description
Plug-in Class Name	This field takes the value: `oracle.search.plugin.security.auth.siebel.SiebelAuthManager`
JAR File Name	This field takes the value: `oracleapplications/Siebel8Crawler.jar`
Siebel 8 authorization Web service endpoint	This field takes the value: `http://<webserver>/eai_<language>/start.swe?SWEExtSource=WebService&SWEExtCmd=Execute&WSSOAP=1`
User ID	This is the Siebel administrative User ID.

Field	Description
Password	This is the Siebel administrative User password.

8. Start the Oracle Secure Enterprise Search application, and verify that buscomp appears as a searchable source on the Search home page.
9. Navigate to the Sources screen.
10. Select the Edit option for the buscomp Source.
    The Source Configuration tab is displayed for the buscomp Source.
11. Select the Authorization tab.
12. Verify that the SBLVISIBILITYID attribute is listed, with a value of Grant, in the Security Attributes table.
    If the attribute has not been created you might have specified an incorrect path to the file RSS_Crawler_Configuration.xml.

Process of Setting Up the File System Source and Connector

The file system source and connector must be set up if you want external file systems to be indexed and searched by Oracle Secure Enterprise Search.

Note: The file system is not a required connector for Siebel Search and Oracle Secure Enterprise Search integration. This process is only required if the Siebel File System connector will be used.

To set up the file system source and connector for integration with Oracle Secure Enterprise Search, perform the following tasks:

- *Configuring the Siebel File System Connector*
- *Deploying the File System Source*
- *Verifying the Oracle Secure Enterprise Search Source for the File System Connector*
- *Enabling Rich Text Format Processing for the External File System Connector*
- *Verifying Indexing for the File System Connector*

Configuring the Siebel File System Connector

The file system connector must be set up if you want external file systems to be indexed and searched by Oracle Secure Enterprise Search.

Note: The file system is not a required connector for Siebel Search and Oracle Secure Enterprise Search integration. This process is only required if the Siebel File System Connector will be used.

This task is a step in *Process of Setting Up the File System Source and Connector*.

To configure the Siebel file system connector for Oracle Secure Enterprise Search

1. Navigate to the Administration - Search OSES screen, then the Search Connector Settings view.
   The Search Connector Settings List applet is displayed.
2. Click on the New button on the list applet.
3. Complete the following file system connector fields.

Field	Value
Name	filesystem
Version	1.0
Library Name	filesystem
Engine Name	OSES

StartingUrl	The starting URL is the location where the files or directories are crawled for indexing. If a URL represents a single file, then the crawler searches only that file. If a URL represents a directory, then the crawler recursively crawls all files and subdirectories in that directory.
	
	Only local host file URLs are allowed. You cannot specify file URLs on a remote computer. It is recommended to set the Starting URL to a shared folder.
	
	On Windows set the value to:
	
	`file://localhost///SiebelServerIPAddress/fs/`
	
	On UNIX set the value to:
	
	`file://localhost//directory_1/directory_2`

4. Select Save Record on the Connector list.

Deploying the File System Source

This topic covers remote administration of the Oracle Secure Enterprise Search File System Connector. This task configures the Oracle Secure Enterprise Search File System Source and Source Group, and creates the Oracle Secure Enterprise Search file system Schedule.

This task is a step in *Process of Setting Up the File System Source and Connector*.

To deploy the file system source for Oracle Secure Enterprise Search

1. Navigate to the Administration - Search OSES screen, then the Search Connector Settings view.

The Search Connector Settings List applet is displayed.

2. Select Filesystem Connector and click Deploy.

   Verify that the deployment status of the file system Connector changes in the Search Connector Settings view.

Verifying the Oracle Secure Enterprise Search Source for the File System Connector

This topic covers verification of the Oracle Secure Enterprise Search Source to integrate with the Siebel Search file system connector. It is recommended to execute this task if the status of the file system connector does not update correctly after the Deploy operation, or if the error message “Error in RemoteAdmin Adapter" is displayed.

This task is a step in *Process of Setting Up the File System Source and Connector*.

To verify the Oracle Secure Enterprise Search Source for the file system connector

1. Start the Oracle Secure Enterprise Search Administration application.
2. Navigate to the Sources screen.
3. Select the Edit option for the Filesystem Source.

   The Source Configuration tab is displayed for the Filesystem Source.
4. Verify that the Starting URL is set to file://localhost///SiebelServerIPAddress/fs/.
5. Start the Oracle Secure Enterprise Search application, and verify that Filesystem appears as a searchable source on the Search home page.

Enabling Rich Text Format Processing for the External File System Connector

Rich Text Format file types are not processed by default by Oracle Secure Enterprise Search. This task enables indexing and searching of RTF files for the external file system connector.

This task is a step in *Process of Setting Up the File System Source and Connector*.

To enable Rich Text Format processing for the external File System Connector

1. Start the Oracle Secure Enterprise Search Administration application.
2. Navigate to the Sources screen.
3. Select the Edit option for the file system Source.

   The Customize File Source screen is displayed for the file system source.
4. Select the Document Types tab.

   The supported document types are listed for the source type.
5. Select RTF Document in the Not Processed column, and click the arrow button to move it to the Processed column.
6. Click Apply.

Verifying Indexing for the File System Connector

The crawling and indexing operations can be invoked from the Oracle Secure Enterprise Search administration UI to make sure that the Oracle Secure Enterprise Search File System Source has been configured correctly. It is recommended to execute this task if the status of the business component connector does not update correctly after the Deploy operation, or if the error message “Error in RemoteAdmin Adapter" is displayed.

This task is a step in *Process of Setting Up the File System Source and Connector*.

To verify indexing for the file system connector

1. Navigate to the Schedules screen in the Oracle Secure Enterprise Search administration application.
2. Select Filesystem Schedule and click Start.
3. Click the Status link to view status details.
4. Start the Oracle Secure Enterprise Search application, and verify that Filesystem appears as a searchable source on the Search home page.

Process of Setting Up the Web Crawler Source and Connector

The crawler source and connector must be set up if you want web sources to be indexed and searched by Oracle Secure Enterprise Search.

Note: The Web Crawler is not a required connector for Siebel Search and Oracle Secure Enterprise Search integration. This process is only required if the Siebel Web Crawler connector will be used.

To set up the Web Crawler source and connector for integration with Oracle Secure Enterprise Search, perform the following tasks:

- *Creating an Oracle Secure Enterprise Search Source for the Web Crawler Connector*
- *Creating a Source Group for the Web Crawler Connector*
- *Verifying Oracle Secure Enterprise Search Indexing of the Web Crawler Source*
- *Administering the Siebel Web Crawler Connector*

Creating an Oracle Secure Enterprise Search Source for the Web Crawler Connector

This topic covers creation of an Oracle Secure Enterprise Search Web Crawler Data Source to integrate with the Siebel Search Web Crawler connector.

This task is a step in *Process of Setting Up the Web Crawler Source and Connector*.

To create an Oracle Secure Enterprise Search source for the Web crawler connector

1. Start the Oracle Secure Enterprise Search Administration application.
2. Navigate to the Sources screen.
3. Select Web from the Source Type list.
4. Click Create.
5. Complete the Web Source fields. The fields are described in the following table.

Field	Description
Source Name	The name for the Web Source. This value corresponds to the crawler connector Library name in the Siebel Search Administration Search Connector Settings view. Set the value to crawler. This value is case sensitive.
Starting URL	The URL for the crawler to begin crawling. The starting address can be in HTTP or HTTPS format, for example, `http://www.oracle.com`.
Self Service	Enable Self Service so that Web sources that require user authentication can be crawled and indexed. Enabling Self Service means that end users can enter their credentials and authenticate themselves to crawl their data.
Start Crawling Immediately	Select this to start crawling automatically after the source is created. Clear this for crawling to begin at the next scheduled time. **Note:** If the Create and Customize button is clicked rather than the Create button, or if Self Service is enabled, then this option is ignored.

6. Click Create.

Creating a Source Group for the Web Crawler Connector

The Oracle Secure Enterprise Search File System Source must be assigned to an Oracle Secure Enterprise Search Source Group. The Oracle Secure Enterprise Search Source Group name must correspond to the Source name and the Siebel connector library name.

This task is a step in *Process of Setting Up the Web Crawler Source and Connector*.

To create a source group for the File System connector

1. Start the Oracle Secure Enterprise Search Administration application.
2. Navigate to the Search screen, then the Source Groups view.
3. Click Create.
4. Enter crawler as the name of the Source Group. This value is case sensitive.
5. Click Proceed to Step 2.
6. Select Web from the Select Source Type list.

7. Click Go.
8. Select crawler from the Available Sources list, and click the arrow button to add it to Assigned Sources.
9. Click Finish.
10. Start the Oracle Secure Enterprise Search application, and verify that crawler appears as a searchable source on the Search home page.

Verifying Oracle Secure Enterprise Search Indexing of the Web Crawler Source

This topic covers invoking the crawling and indexing operations from the Oracle Secure Enterprise Search administration UI, to make sure that the Oracle Secure Enterprise Search crawler source has been configured correctly.

This task is a step in *Process of Setting Up the Web Crawler Source and Connector*.

To verify Oracle Secure Enterprise Search indexing of the Web Crawler data source

1. Navigate to the Schedules view in the Oracle Secure Enterprise Search administration application.
2. Select the crawler Schedule and click Start.
3. Click the Status link to view status details.

Administering the Siebel Web Crawler Connector

The Siebel Search web crawler connector is required for integrating with the Oracle Secure Enterprise Search web crawler source. It is administered in the Search Connector Settings view.

This task is a step in *Administering the Siebel Web Crawler Connector*.

To configure the Siebel Search web crawler connector for Oracle Secure Enterprise Search

1. Navigate to the Administration - Search OSES screen, then the Search Connector Settings view.
   The Search Connector Settings List applet is displayed.
2. Click the New button on the list applet.
3. Complete the following fields.

Field	Value
Name	crawler
Version	1.0
Library Name	crawler
Engine Name	OSES

Field	Value

4. Select Save Record on the Connector list.

Process of Setting Up the Database Source and Connector

The database source and connector must be set up if you want JDBC sources to be indexed and searched by Oracle Secure Enterprise Search.

Note: The Database Connector is not a required connector for Siebel Search and Oracle Secure Enterprise Search integration.

To set up the Database source and connector for integration with Oracle Secure Enterprise Search, perform the following tasks:

- *Creating a Source for the Database Connector*
- *Creating a Source Group for the Database Connector*
- *Verifying Oracle Secure Enterprise Search Indexing of the Database Source*
- *Configuring the Database Connector*

Creating a Source for the Database Connector

This topic covers creation of an Oracle Secure Enterprise Search Source to integrate with the Siebel Search Database Connector. This task is executed in the Oracle Secure Enterprise Search Administration application.

This task is a step in the *Process of Setting Up the Database Source and Connector*.

To create a source for the Database Connector

1. Navigate to the Sources screen.
2. Select Database from the Source Type menu.
3. Click Create.
4. Complete the Database Source fields. The fields are described in the following table.

Field	Description
Source Name	The name of the Database Source. This value corresponds to the crawler connector Library name in the Siebel Search Administration Search Connector Settings view. Set the value to Database.
Database Connection String	The JDBC connection string for the database.

Field	Description

	○ Set the value to the following for an Oracle database:
	`jdbc:oracle:thin@<Hostname>:<Port Number>:<SID>`
	○ Set the value to the following for SQL Server:
	`jdbc:sqlserver://<Hostname>`

User ID	User ID to log in to the database.
Password	Password to log in to the database.
Query	Query to retrieve contents for crawling.
Query File	Path to the XML file specifying the attribute and attachment sub queries.
Cache File	Absolute path and filename prefix of temporary file for caching crawled data, for example: `c:\temp`
Path Separator	Path separator in the document path. Set the value to #.

5. Click Next.
6. Select ACLs Controlled by the Source to secure the table that is crawled.
7. Click Create.

Creating a Source Group for the Database Connector

The Oracle Secure Enterprise Search Database source must be assigned to an Oracle Secure Enterprise Search source group. The Oracle Secure Enterprise Search source group name must correspond to the source name and the Siebel connector library name. This task is executed in the Oracle Secure Enterprise Search Administration application.

This task is a step in the *Process of Setting Up the Database Source and Connector*.

To create a source group for the Database Connector

1. Navigate to the Search screen, then the Source Groups view.
2. Click Create.
3. Enter Database as the name of the Source Group.
4. Click Proceed to Step 2.
5. Select Database from the Select Source Type menu.
6. Click Go.
7. Select Database from the Available Sources list, and click the arrow button to add it to Assigned Sources.

8. Click Finish.
9. Start the Oracle Secure Enterprise Search application, and verify that Database appears as a searchable source on the Search home page.

Verifying Oracle Secure Enterprise Search Indexing of the Database Source

This topic covers invoking the crawling and indexing operations from the Oracle Secure Enterprise Search administration UI, to make sure that the Database source has been configured correctly.

This task is a step in the *Process of Setting Up the Database Source and Connector*.

To verify Oracle Secure Enterprise Search indexing of the Database Crawler

1. Navigate to the Schedules view in the Oracle Secure Enterprise Search administration application.
2. Select the Database Schedule and click Start.
3. Click the Status link to view status details.

Configuring the Database Connector

The Siebel Search Database Connector is required for integrating with the Oracle Secure Enterprise Search Database source. It is administered in the Siebel Search Connector Settings view.

This task is a step in the *Process of Setting Up the Database Source and Connector*.

To configure the Database Connector for Oracle Secure Enterprise Search

1. Navigate to the Administration - Search OSES screen, then the Search Connector Settings view.

   The Search Connector Settings List applet is displayed.
2. Click the New button on the list applet.
3. Complete the following fields.

Field	Value
Name	Database
Version	1.0
Library Name	Database
Engine Name	OSES

4. Select Save Record on the Connector list.

Process of Setting Up the IMAP Email Source and Connector

The IMAP E-Mail source and connector must be set up if you want to index and search IMAP email sources. An email source derives its content from emails sent to a specific email address. When Oracle Secure Enterprise Search crawls an email source, it collects email from all folders set up in the email account, including Drafts, Sent Items, and Trash emails.

Note: The IMAP E-Mail Connector is not a required connector for Siebel Search and Oracle Secure Enterprise Search integration.

To set up the IMAP E-Mail source and connector for integration with Oracle Secure Enterprise Search, perform the following tasks:

- *Creating a Source for the IMAP E-Mail Connector*
- *Creating a Source Group for the IMAP E-Mail Connector*
- *Verifying Oracle Secure Enterprise Search Indexing of the IMAP E-Mail Source*
- *Configuring the IMAP Email Connector*

Creating a Source for the IMAP E-Mail Connector

This topic covers creation of an Oracle Secure Enterprise Search Source to integrate with the Siebel Search E-Mail Connector. This task is executed in the Oracle Secure Enterprise Search Administration application.

This task is a step in the *Process of Setting Up the IMAP Email Source and Connector*.

To create a source for the IMAP E-Mail Connector

1. Navigate to the Sources screen.
2. Select E-Mail from the Source Type list.
3. Click Create.
4. Complete the email source fields. The fields are described in the following table.

Field	Description
Source Name	The name of the IMAP E-Mail Source. This value corresponds to the crawler connector Library name in the Siebel Search Administration Search Connector Settings view. Set the value to IMAP E-Mail.
IMAP Server	The address of the IMAP server.
User Name	The user name for the email account.
Password	The password for the email account.

Field	Description

5. Click Create.

Creating a Source Group for the IMAP E-Mail Connector

The Oracle Secure Enterprise Search IMAP E-Mail source must be assigned to an Oracle Secure Enterprise Search source group. The Oracle Secure Enterprise Search source group name must correspond to the source name and the Siebel connector library name. This task is executed in the Oracle Secure Enterprise Search Administration application.

This task is a step in the *Creating a Source for the IMAP E-Mail Connector*.

To create a source group for the IMAP E-Mail Connector

1. Navigate to the Search screen, then the Source Groups view.
2. Click Create.
3. Enter IMAP E-Mail as the name of the Source Group.
4. Click Proceed to Step 2.
5. Select E-Mail from the Select Source Type list.
6. Click Go.
7. Select IMAP E-Mail from the Available Sources list, and click the arrow button to add it to Assigned Sources.
8. Click Finish.
9. Start the Oracle Secure Enterprise Search application, and verify that IMAP E-Mail appears as a searchable source on the Search home page.

Verifying Oracle Secure Enterprise Search Indexing of the IMAP E-Mail Source

This topic covers invoking the crawling and indexing operations from the Oracle Secure Enterprise Search administration UI, to make sure that the IMAP E-Mail source has been configured correctly.

This task is a step in the *Process of Setting Up the IMAP Email Source and Connector*.

To verify Oracle Secure Enterprise Search indexing of the IMAP E-Mail Crawler

1. Navigate to the Schedules view in the Oracle Secure Enterprise Search administration application.
2. Select the IMAP E-Mail Schedule and click Start.
3. Click the Status link to view status details.

Configuring the IMAP Email Connector

The Siebel Search IMAP Email Connector is required for integrating with the Oracle Secure Enterprise Search Email source. It is administered in the Siebel Search Connector Settings view.

This task is a step in the *Process of Setting Up the IMAP Email Source and Connector*.

To configure the IMAP Email Connector for Oracle Secure Enterprise Search

1. Navigate to the Administration - Search OSES screen, then the Search Connector Settings view.

   The Search Connector Settings List applet is displayed.
2. Click the New button on the list applet.
3. Complete the following fields.

Field	Value
Name	IMAP E-Mail
Version	1.0
Library Name	IMAP E-Mail
Engine Name	OSES

4. Select Save Record on the Connector list.

Process of Setting Up the Lotus Notes Source and Connector

The Lotus Notes source and connector must be set up if you want to index and search Lotus Notes sources. A Lotus Domino Server instance can have one or more databases that can be crawled using the Lotus Notes source. The Lotus Notes source navigates through the databases to crawl email, calendar and address book data.

Note: The Lotus Notes connector is not a required connector for Siebel Search and Oracle Secure Enterprise Search integration.

To set up the Lotus Notes source and connector for integration with Oracle Secure Enterprise Search, perform the following tasks:

- *Setting Up Identity Management for Lotus Notes*
- *Creating a Source for the Lotus Notes Connector*
- *Verifying Oracle Secure Enterprise Search Indexing of the Lotus Notes Source*
- *Configuring the Lotus Notes Connector*

Setting Up Identity Management for Lotus Notes

This topic covers setting up identity management for the Lotus Notes connector. Oracle Secure Enterprise Search provides a Lotus Notes identity plug-in so that the Lotus Domino Directory can be used to authenticate and validate the Lotus Notes users and groups for Siebel Search. This task is executed in the Oracle Secure Enterprise Search Administration application.

This task is a step in the *Process of Setting Up the Lotus Notes Source and Connector*.

To set up identity management for Lotus Notes

1. Navigate to the Global Settings screen, then the Identity Management Setup view.
2. Select Lotus Notes in the Identity Plug-In applet.
3. Click Activate.
4. Complete the Lotus Notes Source fields. The fields are described in the following table.

Field	Description
Server Name	The Domino server fully qualified host name. The value format is **<Server-Name>:<HTTP Port Number>**. Port number is not required if the Domino server is using the default 80 port.
User Name	Name of the Lotus Domino server user to be used for crawling the Lotus Notes databases.
Password	Password for the Lotus Domino server user to be used for crawling the Lotus Notes databases.

5. Click Finish.

Creating a Source for the Lotus Notes Connector

This topic covers the creation of an Oracle Secure Enterprise Search source to integrate with the Siebel Search Lotus Notes connector. This task is executed in the Oracle Secure Enterprise Search Administration application.

This task is a step in the *Process of Setting Up the Lotus Notes Source and Connector*.

To create a source for the Lotus Notes Connector

1. Navigate to the Sources screen.
2. Select Lotus Notes from the Source Type list.
3. Click Create.
4. Complete the Lotus Notes Source fields. The fields are described in the following table.

Field	Description
Source Name	The name of the Lotus Notes source. This value corresponds to the crawler connector Library name in the Siebel Search Administration Search Connector Settings view. Set the value to Lotus Notes.
Server Name	The IP address of the Domino server. The value is specified in the format **<IP address>:< HTTP port number>**.
Attribute List	The list of attribute names in the Lotus Notes database to be crawled. The attributes are specified in a comma-separated list in the format **<attribute name>, <attribute name>**.
User Name	The Lotus Notes user who has access to the Lotus Notes database used for crawling.
Password	The password for the Lotus Notes account.
Container Name	The names of the containers to be crawled. Multiple container names are specified in a comma-separated list. The container name can include folders, databases, views and folders within databases. For example, database-abc.nsf, folders-folder1, views-abc.nsf:By Author, and db-abc.nsf:folder\subfolder.
Authentication Attribute	The name of the authentication attribute that is used to validate the ACL. For Active Directory identity plug-in manager, the value is set to **USER_NAME**. For the Lotus Notes identity plug-in manager, the value is set to **NATIVE**.
Notes Title Field	This field is used to specify the text fields that are parsed to retrieve the title field, such as Subject.

Creating a Source Group for the Lotus Notes Connector

The Oracle Secure Enterprise Search Lotus Notes source must be assigned to an Oracle Secure Enterprise Search source group. The Oracle Secure Enterprise Search source group name must correspond to the source name and the Siebel connector library name. This task is executed in the Oracle Secure Enterprise Search Administration application.

This task is a step in the *Process of Setting Up the Lotus Notes Source and Connector*.

To create a source group for the Lotus Notes Connector

1. Navigate to the Search screen, then the Source Groups view.
2. Click Create.

3. Enter Lotus Notes as the name of the Source Group.
4. Click Proceed to Step 2.
5. Select Lotus Notes from the Select Source Type list.
6. Click Go.
7. Select Lotus Notes from the Available Sources list, and click the arrow button to add it to Assigned Sources.
8. Click Finish.
9. Start the Oracle Secure Enterprise Search application, and verify that Lotus Notes appears as a searchable source on the Search home page.

Verifying Oracle Secure Enterprise Search Indexing of the Lotus Notes Source

This topic covers invoking the crawling and indexing operations from the Oracle Secure Enterprise Search administration UI, to make sure that the Lotus Notes source has been configured correctly.

This task is a step in the *Process of Setting Up the Lotus Notes Source and Connector*.

To verify Oracle Secure Enterprise Search indexing of the Lotus Notes Source

1. Navigate to the Schedules view in the Oracle Secure Enterprise Search administration application.
2. Select the Lotus Notes Schedule, and click Start.
3. Click the Status link to view status details.

Configuring the Lotus Notes Connector

The Siebel Search Lotus Notes Connector is required for integrating with the Oracle Secure Enterprise Search E-Mail source. It is administered in the Siebel Search Connector Settings view.

This task is a step in the *Process of Setting Up the Lotus Notes Source and Connector*.

To configure the Lotus Notes Connector for Oracle Secure Enterprise Search

1. Navigate to the Administration - Search OSES screen, then the Search Connector Settings view.
   The Search Connector Settings List applet is displayed.
2. Click the New button on the list applet.
3. Complete the following fields.

Field	Value
Name	Lotus Notes
Version	1.0
Library Name	Lotus Notes

Field	Value
Engine Name	OSES

4. Select Save Record on the Connector list.

Administering Connectors for Oracle Secure Enterprise Search Integration

This topic covers administering connectors for Siebel Search and Oracle Secure Enterprise integration.

To administer connectors for Siebel Search and Oracle Secure Enterprise integration, perform the following tasks:

- *Updating Connector Settings*
- *Deleting a Connector*

Updating Connector Settings

This topic covers updating Search connector settings for a connector which has already been deployed. The changes are entered in the Siebel Search Connector Settings view, and submitted to Oracle Secure Enterprise Search for remote update.

This task is a step in *Administering Connectors for Oracle Secure Enterprise Search Integration*.

To update connector settings for Oracle Secure Enterprise Search

1. Navigate to the Administration - Search OSES screen, then the Search Connector Settings view.

   The Search Connector Settings List applet is displayed.
2. Select the Connector for which settings have been changed, and click Update Source.

Deleting a Connector

This task deletes the Siebel connector, the corresponding Oracle Secure Enterprise Search source, source group, and schedule, and all index records for that connector. It is recommended to execute this task if a malformed connector must be deleted and recreated.

This task is a step in *Administering Connectors for Oracle Secure Enterprise Search Integration*.

To delete a connector for Oracle Secure Enterprise Search

1. Navigate to the Administration - Search OSES screen, then the Search Connector Settings view.

   The Search Connector Settings List applet is displayed.
2. Select the Connector and click Delete Source.

Disconnecting from Oracle Secure Enterprise Search and Deactivating the Identity Manager

This topic covers disconnecting from Oracle Secure Enterprise Search, and deactivating the identity plugin manager for Siebel.

Disconnecting from Oracle Secure Enterprise Search

Use the following procedure to disconnect from Oracle Secure Enterprise Search, using the Siebel Search Administration UI.

To disconnect from Oracle Secure Enterprise Search

1. Navigate to the Administration - Search OSES screen, then the Search Engine Settings view.
2. Select the CSSOSESAdapter search engine library, and click `Disconnect`.

   The Connected flag in the Search Engine Settings view is set to false.

Deactivating the Siebel Identity Plugin Manager

Use the following procedure to deactivate the Siebel identity plugin manager, using the Oracle Secure Enterprise Search Administration UI.

To deactivate the Siebel Identity Plugin Manager

1. Log in to the Oracle Secure Enterprise Search Administration application.
2. Navigate to the Global Settings screen.
3. Select Identity Management Setup.

   The Siebel Identity Plugin Manager is displayed.
4. Click Deactivate.

Oracle Secure Enterprise Search Changes Required for EAI to Support HTTPS

As of Siebel Innovation Pack 2017, the Enterprise Application Integration (EAI) URL has changed from HTTP to HTTPS. As a result, a certificate must be included in Oracle Secure Enterprise Search for callbacks from Oracle Secure Enterprise Search to EAI to be successful.

The following Oracle Secure Enterprise Search changes are required for EAI to support HTTPS:

1. Install JDK 7 for Oracle Secure Enterprise Search 11.2.2.2.0.

2. Modify the Searchctl.bat file and set the SetDomainEnv files to point to JDK 7.
3. Import the Siebel Certificate into JDK 7.
4. Update the Oracle Secure Enterprise Search WebLogic server to include the certificate.

6 Configuring Siebel Search for Oracle Secure Enterprise Search

Configuring Siebel Search for Oracle Secure Enterprise Search

This chapter describes how to configure search views and execution settings for Oracle Secure Enterprise Search. It includes the following topics:

- *About Siebel Tools Configuration Tasks*
- *Configuring the Indexing Mode for Index Status Monitoring*
- *Process of Configuring Access Control for Search Results*
- *Administering Searchable Fields*
- *Administering Navigable Fields*
- *Administering Field Weighting*
- *Administering Query-Time Clustering Configuration*
- *Configuring the Language LOV for Siebel Search Preferences*

This chapter assumes that you know how to use Siebel Tools. For more information, see *Using Siebel Tools* .

About Siebel Tools Configuration Tasks

Siebel Tools is a declarative software development tool that allows you to configure the underlying data and data presentation of your Siebel application without making changes to the program source code. Siebel Business Applications provide a core set of search object definitions that you can use as a basis for your tailored application. There are no source code modifications, nor modifications to schema. Siebel Tools uses the Siebel Runtime Repository configuration provided by Oracle.

Configuring the Indexing Mode for Index Status Monitoring

This topic covers configuration of the indexing mode for index status monitoring. The indexing mode is configured for FTP indexing by default. For information on index status monitoring, see *Monitoring Index Status*.

To configure the indexing mode for index status monitoring

1. Log in to Siebel Tools.

2. Query for the Search Index Batches BC business component.
3. Configure the Search Specification property using the following SQL conditions:
    - Set Search Specification to Index Mode<>'HTTP' for FTP indexing.
4. Update the repository and deliver the update.

Process of Configuring Access Control for Search Results

User access to a particular view in the search results is determined by the sblvisibilityid index field mapping, and the account profile of the logged in user, such as Position ID or Account ID.

To configure access control for search results, perform the following tasks:

- *Configure sblvisibility Index Field Mappings*
- *Configuring the Search Visibility Objects*
- *Configuring Drill Down View Sequence for Search Results*

Configure sblvisibility Index Field Mappings

The sblvisibilityid index fields are mapped to business component access control fields, such as Position ID or Account ID. The sblvisibilityid index fields can also be mapped to custom access control fields. Multiple sblvisibilityid index fields can be defined for each business component. The sblvisibilityid index fields are configured in Aplication_Suite_OSES_Field-Mappings.xml. For more information on configuring index field mappings, see *Configuring Index Mappings for Oracle Secure Enterprise Search*. For more information on access control, see the access control topic in *Siebel Security Guide*.

This task is a step in the *Process of Configuring Access Control for Search Results*.

To configure sblvisibilityid index field mappings

1. Open the index mapping file Application_Suite_OSES_Field-Mappings.xml.The correct mapping file to use is determined as follows:
    - Use the file SSC_OSES_Field-Mappings.xml if you are using a Siebel application that operates across industries, such as Siebel Call Center, Siebel Sales or Siebel Marketing.
    - Use the file SIA_OSES_Field-Mappings.xml if you are using a Siebel industry application, such as Siebel Finance, Siebel Medical, or Siebel Pharma.
2. Set the bc-name attribute of each sblvisibilityid field to a business component access control field.
3. Save the changes to the mapping file.
4. Restart the Siebel server to populate the Search Index Settings and Available Fields views of the search administration UI with any new index fields.

Example of Mapping sblvisibilityid index fields

This extract provides an example of configuring the sblvisibilityid index field.

```
<field bc-name="Primary Organization Id" in-name="sblvisibilityid" ui-name="" on-
name="" nv-name="" one2many="" is-id="N" id-rank="" type="na" />
```

```
<field bc-name="Contact Id" in-name="sblvisibilityid" ui-name="" on-name="" nv-
name="" one2many="" is-id="N" id-rank="" type="na" />

<field bc-name="Owned By Id" in-name="sblvisibilityid" ui-name="" on-name="" nv-
name="" one2many="" is-id="N" id-rank="" type="na" />

<field bc-name="Owner Position Id" in-name="sblvisibilityid" ui-name="" on-name=""
nv-name="" one2many="" is-id="N" id-rank="" type="na" />
```

Configuring the Search Visibility Objects

This task covers configuring search visibility objects for determining access control for search result views.

This task is a step in the *Process of Configuring Access Control for Search Results*.

To configure the search visibility objects for Oracle Secure Enterprise Search

1. Navigate to the Administration - Search OSES screen, then the Search Visibility Settings view.
2. Add the Search Visibility objects with the values shown in the following table.

Visibility Object	Description
Business Object	This is the business object name.
Business Component	This is the business component name.
Input Field Name	This is a field name in the business component, such as Login Name, used to retrieve the access control values assigned to that user. The access control values retrieved can include fields such as PositionId, OrganizationId, or AccountId.

3. Configure the search visibility object fields with the values shown in the following table.

Visibility Object Field	Description
Field	The field name of the business component field used to determine access control, such as PositionId, OrganizationId, or AccountId.
Multi Valued	Set to Y for a multi valued field.
Parent Field	(Optional) The parent field name. It must be set if the parent field is to be included in determining access control.

4. Save the record.

Configuring Drill Down View Sequence for Search Results

This topic covers configuration of the sequence of drill down views for search results. User access to a particular view is determined by the sblvisibilityid index field mapping, and the account profile of the logged in user, such as Position ID or Account ID.

This task is a step in the *Process of Configuring Access Control for Search Results*.

To configure drill down view sequence for Oracle Secure Enterprise Search results

1. Navigate to Administration - Search OSES screen, then the Search Index Settings view.
2. In the Search Index Settings applet, select the Search Category for which drill down views are to be configured.
3. In the View Name column, select the drill down view.
   Multiple views can be selected.
4. In the Seq Num column, enter a sequence number.

Administering Searchable Fields

The Searchable fields option on the Available Fields list applet determines which Search Category fields are displayed on the Search Center UI as searchable fields.

To administer searchable fields for Oracle Secure Enterprise Search

1. Navigate to the Administration - Search OSES screen, then the Search Index Settings view.
2. In the Search Index Settings applet, select the Search Category for which searchable fields are to be configured.
   The fields for the selected Search Category are displayed in the Available Fields applet.
3. Select Y (searchable) or N (not searchable) in the Searchable column for each field.
4. Enter a Display Name if it does not already exist.
   The Display Name appears on the searchable field text box on the Search Center UI.
5. Select Save Record on the Available Fields list.

Administering Navigable Fields

The Navigable fields option on the Available Fields list applet determines which fields are displayed in a Refine Results operation.

To administer navigable fields for Oracle Secure Enterprise Search

1. Navigate to the Administration - Search OSES screen, then the Search Index Settings view.
2. In the Search Index Settings applet, select the Search Category for which navigable fields are to be configured.
   The fields for the selected Search Category are displayed in the Available Fields applet.

3. Select Y (navigable) or N (not navigable) in the Navigable column for each field.
4. Enter a Display Name if it does not already exist.

   The Display Name appears in the Refined Results view on the Search Center UI.
5. Select Save Record on the Available Fields list.

Administering Field Weighting

The Search Index Settings view enables different weights to be defined for each searchable field in the search criteria, determining the field's ranking in the search results. For example, in the Service Request Category, a weighting of 4 could be assigned to the Description field and a weighting of 2 could be assigned to the Abstract field, to rank the Description field higher in the search results, and thereby make the results more relevant. The search is executed first against the fields that have more weighting.

The Siebel Search numeric weights are mapped to the Oracle Secure Enterprise Search weight parameters in the file Search_Engine_Config.xml. Do not modify the contents of the file Search_Engine_Config.xml from the preconfigured settings.

To administer field weighting for Oracle Secure Enterprise Search

1. Navigate to Administration - Search OSES screen, then the Search Index Settings view.
2. In the Search Index Settings applet, select the Search Category for which field weightings are to be configured.

   The fields for the selected Search Category are displayed in the Available Fields applet.
3. Enter a Weighting for each field in the Weighting factor column. The available weightings and corresponding rankings are described in the following table.

Numeric Weighting	Ranking
4	Very high
3	High
2	Medium
1	Low
0	Very low

4. Select Save Record.

Administering Query-Time Clustering Configuration

Siebel Search uses the Oracle Secure Enterprise Search Cluster Nodes framework to dynamically generate query-time automated keywords. This task covers verifying the Oracle Secure Enterprise Search cluster settings that are required for Siebel Search automated keywords.

It is recommended to assign the “keywords" value to the in-name attribute of a descriptive business component field, if automated keywords are required. For information on defining index attributes, see *Defining Index Attributes*.

For more information on cluster configuration and search attributes, see *Oracle Secure Enterprise Search Administrator's Guide*.

The Siebel Search automated keywords framework is mapped to the Oracle Secure Enterprise Search cluster configuration framework in the file Search_Engine_Config.xml. Do not modify the contents of the file Search_Engine_Config.xml from the preconfigured settings.

To verify Oracle Secure Enterprise Search query-time clustering configuration

1. Start the Oracle Secure Enterprise Search Administration application.
2. Navigate to the Global Settings screen, and then the Clustering Configuration view.
3. Confirm that Enable Clustering is selected under Cluster Tree Configuration.
4. Confirm that the Topic cluster tree has been created under Cluster Trees with the following values:

Field	Value
Tree Name	Topic
Cluster Type	Topic
Attributes	Keywords, Title, eqsnippet, eqtopphrases
Status	Enabled

Configuring the Language LOV for Siebel Search Preferences

This topic describes how to create and configure the Language list of values for the Search Preferences applet. The examples in this topic use English, German, and Korean.

To configure the Language LOV for Siebel Search

1. Navigate to the Administration - Data screen, and then the List of Values view.
2. Create the LOV header record, using the information in the following table.

Type	Display Value	Language Independent Code
LOV_TYPE	SEARCH_LANGUAGE	SEARCH_LANGUAGE

3. Select the Active option.
4. Select the Translate option.
5. Set the Replication Level to All.
6. Define the list of languages to display in the Language LOV, using the information in the following table.

Type	Display Value	Language Independent Code	Language Name	Order
SEARCH_LANGUAGE	English	English	English-American	1
SEARCH_LANGUAGE	German	German	English-American	2
SEARCH_LANGUAGE	Korean	Korean	English-American	3

7. Select the Active option.
8. Select the Translate option.
9. Set the Replication Level to All.

7 Configuring Index Mappings for Oracle Secure Enterprise Search

Configuring Index Mappings for Oracle Secure Enterprise Search

This chapter covers customizing and extending search objects for integration with Oracle Secure Enterprise Search, and includes the following topics:

- *About Searchable Objects*
- *Defining Index Elements*
- *Defining Index Attributes*
- *Creating Search Run-Time Events for Custom Search Objects*
- *Configuring the Business Service User Property in ContentService When Indexing Business Component Pairs*

About Searchable Objects

All searchable objects are defined in an XML mapping file, rather than through Siebel Tools. Siebel Search ships with the preconfigured search categories listed in *Preconfigured Search Objects for Oracle Secure Enterprise Search*. To create additional custom search objects, or to add 7.x custom search objects, the object definition must be mapped in a field mapping XML file. The elements and attributes defined in the XML field mapping file populate the Search Index Settings and Available Fields views of the search administration UI. The search objects can be configured in the search administration UI once the search object has been created in the XML mapping file. These index mapping definitions are used to generate the XML data feed files, which Oracle Secure Enterprise Search crawls and indexes.

If amendments to the XML field mapping are required to create custom Search Objects, it is recommended that these are completed before the index is initially built, if possible. If the XML field mapping file is edited after initial deployment, the Siebel Server must be restarted, and an Index All operation must be executed to index any new or modified search objects.

Defining Index Elements

Siebel Search index mapping fields are mapped to business component fields in the file SIA_OSES_Field-Mappings.xml or the file SSC_OSES_Field-Mappings.xml, to define searchable objects. The definitions in this mapping file are used to generate the XML data feed files, which Oracle Secure Enterprise Search crawls and indexes.

Once the index mappings have been defined in Application_Suite_OSES_Field-Mappings.xml, the Siebel Server must be restarted, and the Search Administration UI must be populated with the new Search Categories or Available Fields. See *Administering Siebel Search Index Settings for Oracle Secure Enterprise Search*.

The correct mapping file to use is determined as follows:

- Use the file SSC_OSES_Field-Mappings.xml if you are using a Siebel application that operates across industries, such as Siebel Call Center, Siebel Sales or Siebel Marketing.
- Use the file SIA_OSES_Field-Mappings.xml if you are using a Siebel industry application, such as Siebel Finance, Siebel Medical, or Siebel Pharma.

The following table lists the elements and attributes for defining business component index mappings.

Element	Attributes	Description	Mandatory
BusComp	name	Name of the business component, for example: `name="Service Request Attachment"`	Yes
	ui-name	This is the string that will be displayed in the user interface, for example: `ui-name="SR Attachments"`	Yes
	on-name	This attribute is not supported.	No

	url	This attribute takes the following format:
		
		`url="http://`
		`%webserver%`
		`/`
		`%objmgr%`
		`_`
		`%lang%`
		`/`
		`start.swe?SWECmd=GotoView&SWEView=#VIEWNAME#&S`
		`WERF=1&SWEHo=%hostName%&SWEBU=1&SWEApplet0=#AP`
		`PLETNAME#&SWERowId0=#ROWID#"`
			Yes

	parent	This attribute is used to specify the parent of a child business component, for example: `parent="Service Request"`	No
	fkey-field	This attribute is used to define a foreign key field, for example: `fkey-field="Activity Id"`	No
field	bc-name	Name of the business component field, for example:	Yes

Element	Attributes	Description	Mandatory
		bc-name="Attachment List" The value displays in the Field Name column of the Available Fields list applet.	
	in-name	This is the index field for the business component field, for example: **in-name="listing01"** See *Defining Index Attributes* for a list of required, recommended and optional in-name definitions.	Yes
	ui-name	This is the string that will be displayed as the search result snippet in the user interface, for example: **ui-name="Attachments"** This value populates the Available Fields list applet on the Siebel Search administration UI. The field name is displayed on the application UI if the Searchable flag option is selected in the Available Fields list applet.	No
	on-name	This attribute is not supported.	No
	nv-name	This attribute is not supported.	No
	is-id	This attribute is not supported.	No
	id-rank	This attribute is not supported.	No
	on-name	This attribute is not supported.	No
	one2many	This attribute is used for passing the business component child category information. This attribute is mandatory when you want to index a child business component, and the child business component has multiple rows associated with the parent business component. The one-to-many mapping must conform with the following format: **<Child Business Component Name>:<Child Fields><Child Reference Field>, for example, Service Request Attachment:ActivityFileSrcPath,ActivityFileName,ActivityFileExt,Activity Id.** In this example the constituent parts are as follows: Child Business Component Name. This must be the exact name defined in Siebel Tools. Child Business Component Name takes just one value, for example: **Service Request Attachment**.	Yes

Element	Attributes	Description	Mandatory
		Child Fields. Comma separated list of child business component fields to be indexed, for example: `ActivityFileSrcPath,ActivityFileName`. One or more values can be entered for Child Fields, each value must be separated by a comma. Child Reference Field. Child Reference Field is the foreign key equivalent of the parent Business Component linked to `PAR_ROW_ID` of the child table, for example: `Activity Id`. Child Reference Field takes just one value.	
	type	Used to define the file type represented by the field. This attribute is mandatory for file fields. Valid values are as follows: • type="path" • type="filename" • type="ext" • type="na"	Yes

Defining Index Attributes

This topic covers defining the attribute values for the in-name attribute. Attributes are defined in name-value pairs. In the example `<field bc-name="Description" in-name="keywords ui-name="Description" type="na"/>`, `in-name` is an attribute name, and `"keywords"` is an optional attribute value. The following table lists the mandatory, recommend and optional attribute values for assigning to the in-name attribute. The in-name attribute and values are defined in the file Application_Suite_OSES_Field-Mappings.xml. The index fields are reusable for mapping across business component fields.

Attribute Name	Attribute Value	Description	Mandatory
in-name	accessURL	Used for mapping to the business component access URL field.	No
	alias	Used for mapping to name fields.	No
	author	This index field is reserved and cannot be mapped to user-defined fields. This index field maps to the business component Updated By field. The Updated By field must also be populated in the Search Index Settings Available Fields applet in the Administration - Search UI.	Yes
	body	Used for mapping to main content field. This field is mandatory and is used to generate search results.	Yes
	city	Used for mapping to city name fields.	No

Attribute Name	Attribute Value	Description	Mandatory
	code01	Used for mapping to generic code or ID fields.	No
	code02	Used for mapping to generic code or ID fields.	No
	comment	Used for mapping to comment fields.	No
	country	Used for mapping to country name fields.	No
	createdBy	This index field is reserved and cannot be mapped to user-defined fields. This index field maps to the business component Created By field. The Created By field must also be populated in the Search Index Settings Available Fields applet in the Administration - Search UI.	Yes
	createdOn	This index field is reserved and cannot be mapped to user-defined fields. This index field maps to the Created business component field. The **Created** field must also be populated in the Search Index Settings Available Fields applet in the Administration - Search UI.	Yes
	csn	Used for mapping to customer ID number fields.	No
	date01	Used for mapping to date fields.	No
	date02	Used for mapping to date fields.	No
	description	Used for mapping to generic descriptive fields, such as comments, FAQ or details.	Recommended
	emailed	Used for mapping to email address fields.	No
	faxNumber	Used for mapping to fax number fields.	No
	firstName	Used for mapping to first name fields.	No
	keywords	This index field corresponds to the Oracle Secure Enterprise Search Keywords search attribute, and, if configured, is used for cluster configuration. This field is recommended if automated keywords are required. The following provides an example keywords definition for the SR Resolution Item business component: `<field bc-name="Description" in-name="Keywords" ui-`	Recommended

Attribute Name	Attribute Value	Description	Mandatory
		`name="Description" on-name=""nv-name=""one2many="" is-id="N" id-rank=""type="na"/>` This configuration ensures that the content of the SR Resolution Item Description field is mapped to the Oracle Secure Enterprise Search Keywords attribute. This definition tags the Description value as a keyword in the feed file. When Oracle Secure Enterprise Search crawls and indexes the feed file, it processes the value of the Description field as a keyword for cluster configuration and automated keywords. For information on administering cluster configuration for automated keywords, see *Administering Query-Time Clustering Configuration*. For more information on search attributes, see *Oracle Secure Enterprise Search Administrator's Guide*.	
	language	Used for mapping to language identifier fields.	No
	lastModifiedDate	This index field is reserved and cannot be mapped to user-defined fields. This index field maps to the business component Updated field. The Updated field must also be populated in the Search Index Settings Available Fields applet in the Administration - Search UI.	Yes
	lastName	Used for mapping to last name fields.	No
	level	Used for mapping to level fields.	No
	listing01	Only to be used for one-to-many field mapping.	No
	listing02	Only to be used for one-to-many field mapping.	No
	location	Used for mapping to site, directory, or path fields.	No
	name	Used for mapping to name fields.	No
	orgName	Used for mapping to organization name fields.	No
	owner	Used for mapping to Organization Information or other visibility information fields.	No
	phoneNumber01	Used for mapping to phone number fields.	No
	phoneNumber02	Used for mapping to phone number fields.	No

Attribute Name	Attribute Value	Description	Mandatory
	price	Used for mapping to price fields.	No
	sblbctype	This index field is reserved and cannot be mapped to user-defined fields. This index field is used for mapping to the BC Name business component field, and is used to generate search results. The BC Name field must also be populated in the Search Index Settings Available Fields applet in the Administration - Search UI.	Yes
	sblrowid	This index field is reserved and cannot be mapped to user-defined fields. This index field is used for mapping to the business component ID field. The ID field must also be populated in the Search Index Settings Available Fields applet in the Administration - Search UI.	Yes
	sblvisibilityid	The sblvisibilityid index field is used for mapping to business component fields used for access control, such as the business component's Organization ID , Contact ID, Owner Position ID, or Account ID fields. The sblvisibilityid index field can also be mapped to custom access control fields. Multiple sblvisibilityid index field mappings can be used for each business component. The visibility ID is captured at index-time and stored in the database with the indexed records. At query-time, the User ID is sent with the search criteria and authenticated by the Oracle Secure Enterprise Search Web Service. The search results are filtered based on the field's sblvisibilityid settings, and the profile of the logged in user. This mapping is mandatory for access controlled business components. See the access control topic in Siebel Security Guide for more information.	Yes
	sblvisibilityinfo	This index field is reserved and cannot be mapped to user-defined fields. This index field is used for mapping to the business component Organization Information or other visibility information fields. This mapping is optional, and is used for access controlled business components.	No
	sourceHierarchy	Used for mapping to hierarchy information fields.	No
	state	Used for mapping to geographical state fields.	No
	status	Used for mapping to BusComp status fields.	No
	street	Used for mapping to street address fields.	No

Attribute Name	Attribute Value	Description	Mandatory
	summary	Used for mapping to descriptive summary fields.	Recommended
	textID	Used for mapping to text ID fields.	No
	Title	Used for mapping to title information fields.	Yes
	type	Used for mapping to record type fields.	No
	value	Used for mapping to String value fields.	No
	zipcode	Used for mapping to zip-code, postal-code and pin-code fields.	No

Creating Search Run-Time Events for Custom Search Objects

Search run-time events must be created for any custom search object that you create. Run-time events must be created to enable incremental indexing and refresh indexing for custom Search Objects. This topic covers configuration of search runtime events for monitoring create, update and delete events executed on Search Objects in the data repository. These runtime events can be customized to monitor any type of event. The Action Sets create records in the transaction table and trigger the Search Content business service method UpdateIndex(). See *Siebel Personalization Administration Guide* for more information on Siebel Run-Time Events.

To create Search run-time events for custom search objects

1. Navigate to the Administration - Runtime Events screen, then the Action Sets view.
2. Query on the Update Index Action Set.
3. Click the Event Aliases tab.
4. Click the New button on the Event Alias screen.
5. Complete the Event Alias fields for each buscomp create, update and delete operation. Use the Service Request values in the following table for reference.

Name	Object Type	Object Name	Event
Service Request - New	BusComp	Service Request	NewRecord
Service Request - Write	BusComp	Service Request	WriteRecord
Service Request - PreDelete	BusComp	Service Request	PreDeleteRecord

Name	Object Type	Object Name	Event

6. Select Save Record.

Configuring the Business Service User Property in ContentService When Indexing Business Component Pairs

For the Solution and Solution Admin business component pair, Solution is typically used for indexing and not Solution Admin where the runtime events are generated. If using the Solution business component for indexing, then you must create a name-value pair for Solution and Solution Admin in Siebel Tools in the Business Service User Prop under the Content Service business service as shown in the following procedure. These instructions apply to other business component pairs similar to Solution and Solution Admin (for example: Sales Tool and Admin Sales Tool business component pair).

To configure the Business Service User Prop in ContentService for indexing business component pairs

1. Log into Siebel Tools.
2. Go to the Fast Search Project, choose Tools and then Lock Project to lock the Fast Search Project.
3. Go to the Content Service business service.
4. Create a new Business Service User Prop with the following values:

Field	Value
Name	Solution Admin
Value	Solution

5. In the Siebel application, go to the Administration - Runtime Events screen, then the Event Aliases view and verify that the run-time event alias fields for the Solution Admin buscomps are as shown in the following table.

Name	Object Type	Object Name	Event
Solution - New	BusComp	Solution Admin	NewRecord
Solution - Write	BusComp	Solution Admin	WriteRecord
Solution - PreDelete	BusComp	Solution Admin	PreDeleteRecord

Name	Object Type	Object Name	Event

6. Go to the Administration - Runtime Events, then the Events view and verify that the event fields for the Solution Admin buscomps are as shown in the following table.

Sequence	Name	Object Type	Object Name	Event	Action Set Name
0	Solution - New	BusComp	Solution Admin	NewRecord	Update Index
1	Solution - Write	BusComp	Solution Admin	WriteRecord	Update Index
2	Solution - PreDelete	BusComp	Solution Admin	PreDeleteRecord	Update Index

Note the following:

- You can modify records only in the Admin business component but you can set the drilldown search results to a view that corresponds to a non-Admin business component.
- Adding the new Business Service User Prop in the ContentService business service makes sure that:
  - The Solution business component will be indexed.
  - If records are modified in the Solution Admin business component, then the index will refresh and increment the changes.
  - The drilldown search results will be correct.
- The ContentService business service contains an UpdateIndex method which is accessed by run time events when records are inserted, updated, or deleted from various business components. The UpdateIndex method inserts rows into the S_SRCH_CHG_TXN table, which contains a row for each change such as the Row Id val, Business Component Name, and the operation code (W-insert, W-update, or D-delete). If an insert, update, or delete operation is carried out on the Solution Admin business component, then the row inserted into the S_SRCH_CHG_TXN table is as follows: 'BUSCOMP_NAME'=Solution.
- If indexing the Solution Admin (and not the Solution) business component, then it is not necessary to add the new Business Service User Prop mentioned in Step 4. Set the view name for that index category to the Solution Admin business component view. For example:

  - For the Solution Admin business component: Solution Administration View

  - For the Solution business component: All Solution List View

  If indexing the Solution Admin business component and if using the Solution business component as the view, then the search results will be incorrect.

Note: When new run-time events are added, you must synchronize the enterprise components and then restart the Siebel Server and Siebel Gateway services.

8 Administering Siebel Search Index Settings for Oracle Secure Enterprise Search

Administering Siebel Search Index Settings for Oracle Secure Enterprise Search

This chapter covers administering search indexes and enabling server components required for indexing. This chapter includes the following topics:

- *About Search Indexes Creating a New Index Definition*
- *Creating a Logical Collection*
- *Filtering the Index Record-Set*
- *Creating Searchable Business Component Fields*
- *About Indexing Search Objects*
- *Administering Asynchronous Indexing and Index Status Monitoring*
- *Monitoring Index Status*
- *Administering Batch Processing Status for FTP Indexing*

About Search Indexes

The search indexes definition determines what fields in a data source or business component are included in the index and are available for searching, and what fields are displayed in the Search Center UI as searchable fields. The index definition can enable more efficient and relevant indexing and searching by omitting less relevant fields from the index and search operations.

Search indexes are defined and configured in the Search Index Settings view of the search administration UI.

Creating a New Index Definition

Search Categories for each Siebel application are defined in Search Definition groupings in the Search Definition view. This view can be used for creating or customizing Search Definitions and Search Definition Categories. The business component for any new custom Search Category must first be mapped in the file Application_Suite_OSES_Field-Mappings.xml. See *Defining Index Elements* for information on creating custom search objects for Oracle Secure Enterprise Search integration. When a new Search Definition is created, the Definition must be added to the application Object Manager for a Siebel Web Client, or to the application configuration file, for a Siebel Developer Web Client.

Creating a New Index Definition

This topic covers creating a new Search Definition. You create the definition in the Search Definition view.

To create a new index definition for Oracle Secure Enterprise Search

1. Navigate to Administration - Search OSES screen, the Search Definition view.
2. Click on the New button.
3. Complete the Definition fields.

   The Name field is mandatory.
4. Select the Default Flg field if this Definition is to be set as the default.
5. In the Search Definition Categories list applet click on the New button.
6. Complete the Category fields.

   The Name, View Name and Business Component fields are mandatory. The business component which corresponds to the Search Category must be selected from the list.
7. Select Save Record on the Search Definition list.

Configuring the Search Definition on the Siebel Web Client

This topic covers configuring a new search definition on the Siebel Web Client.

To configure the search definition on the Siebel Web Client

1. Navigate to Administration - Server Configuration screen, then the Servers and Components view.
2. Select the Object Manager Component for your application.
3. In the Parameters list applet click Advanced.
4. Query for the Search - Definition Name parameter.
5. Replace the value of the Search - Definition Name parameter with your Search Definition Name.
6. Restart the Siebel services.

Configuring the Search Definition on the Siebel Developer Web Client

This topic covers configuring the Search Definition in the SearchDefName parameter of the application configuration file for the Siebel Developer Web Client. Application configuration file names are in the format <application>.cfg, for example, the file shm.cfg is the Siebel Hospitality application configuration file, and the file uagent.cfg is the Siebel Call Center application configuration file. Verify that you are using the correct application configuration file by checking the ApplicationName parameter in the file.

Note: This configuration change must be applied to each application configuration file for each language in the enterprise.

To configure the Search Definition on the Siebel Developer Web Client

1. Open the application configuration file in a text editor:
   - On Windows the file is located at: <install_dir> `\siebsrvr\bin\<language>\<application>.cfg`
   - On UNIX the file is located at <install_dir> `/siebsrvr/lib/<language>/<application>.cfg`
2. Go to the SIEBEL section of the configuration file.
3. Change the value of the SearchDefName parameter to the Search Definition Name value configured in the Search Definition view, and save the changes.

Creating a Logical Collection

This procedure covers grouping Search Categories into Logical Collections, for example, a People Logical Collection could be created to include the search Categories Employees and Contacts. A search on the People Logical Collection would then include a search on both the Employees and Contacts Search Categories.

To create a logical collection for Oracle Secure Enterprise Search

1. Navigate to Administration - Search OSES screen, Search Index Settings, and then the Search Indices Parent Category View.
2. In the Search Indices Parent Category View, click New to add a new search index parent category and configure the following fields:
   a. In the Name field, type in the parent category name.
   b. In the Parent Category Field, select the check box.
   c. In the Seq Num field, enter a sequence number.
3. In the Search Category List applet, click New, and select a category to be included from the list of available categories that appears.

   Repeat this step to add more categories to the Search Category List as required.

Filtering the Index Record-Set

The index record-set can be filtered at the Category level, to incorporate custom business rules, using the Filter Search Spec field. This field takes SQL statements that comply with the syntax defined in *Filter Search Specifications Syntax for Oracle Secure Enterprise Search*.

To filter the index record-set for Oracle Secure Enterprise Search

1. Navigate to Administration - Search OSES screen, then the Search Index Settings view.
2. In the Filter Search Spec field, enter the SQL statement for each category that is to be pre-filtered.

   The syntax must comply with that defined in *Filter Search Specifications Syntax for Oracle Secure Enterprise Search*.

Creating Searchable Business Component Fields

Specific fields in a business component can be excluded from the indexing and search operation, to enable more efficient indexing and searching, and more relevant results. The Available Fields list applet determines which fields are included in an index operation, and therefore which fields are available for searching. The new custom fields must first be mapped in the file Application_Suite_OSES_Field-Mappings.xml. See *Defining Index Elements* for information on mapping custom fields for Oracle Secure Enterprise Search.

To create searchable business component fields for Oracle Secure Enterprise Search

1. Navigate to Administration - Search OSES screen, then the Search Index Settings view.
2. Select the business component for which the new fields will be indexed.
3. In the Available Fields applet, click New and complete the fields.
    a. In the Field Name field, select a field name from the drop-down list. This field is mandatory.
    b. (Optional) In the Searchable field, select the text box.

About Indexing Search Objects

The indexing process is comprised of a number of tasks on the Siebel side and on the Oracle Secure Enterprise Search side. When indexing initiates, the Status Code changes to a null value in the Search Index Settings view, and a set of SearchDataProcessor jobs are created. The SearchDataProcessor jobs create temporary XML feed files under the XML Indexable Data Location. For each batch of rows to be indexed, a separate job is created. The index operation starts the relevant Oracle Secure Enterprise Search Schedule. Oracle Secure Enterprise Search uses a crawler to collect data from the XML feed files for each data source, and to generate the index. This index is used for searching data sources.

The SearchDataProcessor status can be monitored in the Jobs view of the Administration - Server Management screen. When complete, each SearchDataProcessor job updates the status code for the search index to Indexed, and the Status Details reflect the number of indexed rows. The index operation is complete on the Siebel side when all of the SearchDataProcessor jobs have a status of success or error. The status details for the search index reflect the number of rows successfully transferred to feed files. If the number of indexed rows is lower than the number of records in the business component, it is recommended that the SearchDataProcessor logs are checked for errors on the jobs that have not executed successfully.

The Oracle Secure Enterprise Search schedule status can be monitored in the Crawler Schedules table of the Schedules tab on the Oracle Secure Enterprise Search administration UI. For more information on indexing status, select the log file icon in the Crawler Schedules table.

Siebel Search provides the following indexing operations:

- Full Indexing. The full indexing operation can be executed on all search objects defined in the XML mapping file, or on a specific business component or connector. This operation is available for thin and thick clients. For more information, see *Indexing Search Objects*.

- Refresh Indexing. Refreshes the index with any create, update or delete operations which have been executed on the data source since the last index operation. This operation is available for thin and thick clients. For more information, see *Refreshing the Index*.
- Incremental Indexing. Updates the index, at preconfigured intervals, with any create, update or delete operations which have been executed on the data source since the last index operation. This operation is available for thin clients. For more information, see *Enabling Incremental Indexing*.

Indexing Search Objects

Full indexing can be executed against all entries in the selected Search Category (business component or external file system), by selecting the Index operation, or against all entries in the default Search Definition listed in the Search Index Settings applet, adding any new fields from the field mapping file, by selecting the Index All operation. Upon successful completion of indexing, the Status Code changes to Indexed, and the Status Details column details the number of records indexed. The number of rows indexed must correspond to the number of records in the business component. The number of records indexed is displayed when indexing a business component, and is not displayed when indexing a file system.

To index search objects for Oracle Secure Enterprise Search

1. Navigate to Administration - Search OSES screen, then the Search Index Settings view.
2. Do one of the following to index one or all search components:

   a. Select the component to be indexed and click Index.
   b. Click Index All to index all components for the Default Search Definition.

   When indexing initiates, the Status Code changes to a null value. When indexing completes the Status Code changes to Indexed.
3. Start the Oracle Secure Enterprise Search administration application to monitor indexing from the Oracle Secure Enterprise Search side:

   a. Select the Oracle Secure Enterprise Search Schedules tab.
   b. Click the Launching or Executing link in the Status table.
   c. Click on the Statistics link.

   The Crawler Progress Summary is displayed, with a list of the number of documents crawled. Indexing is completed from the Oracle Secure Enterprise Search side once the Schedule Status has changed to Scheduled.

Refreshing the Index

Refresh indexing provides for immediate update of the search index. It is supported for both thick and thin clients. The Status Details field is incremented by the number of new records and decremented by the number of deleted records. Record updates do not contribute to the Status Details record count. Refresh indexing is supported for business components, and is not supported for the File System Connector.

Activating search run-time events is a prerequisite for using the index refresh function.

- To enable refresh indexing for preconfigured search objects, see *Activating Search Run-Time Events*.
- To enable refresh indexing for custom search objects, see the following:

- *Activating Search Run-Time Events*.
- *Creating Search Run-Time Events for Custom Search Objects*.

The following procedure shows you how to refresh index search objects for Oracle Secure Enterprise Search.

To refresh index search objects for Oracle Secure Enterprise Search

1. Navigate to Administration - Search OSES screen, then the Search Index Settings view.
2. Select the component to be indexed and click Refresh.

   When indexing initiates the Status Code changes to a null value. When indexing completes the Status Code changes to Indexed.
3. Start the Oracle Secure Enterprise Search administration application to monitor indexing from the Oracle Secure Enterprise Search side:

   a. Select the Oracle Secure Enterprise Search Schedules tab.
   b. Click the Launching or Executing link in the Status table.
   c. Click on the Statistics link.

The Crawler Progress Summary is displayed, with a list of the number of documents crawled. Indexing is completed from the Oracle Secure Enterprise Search side once the Schedule Status has changed to Scheduled.

Enabling Incremental Indexing

Incremental indexing is used to schedule automatic refresh indexing on all search objects. The index for all search objects (business components or search categories) is updated, at preconfigured intervals, with any create, update or delete operations which have been executed on the data source since the last index. The interval is configured at the level of each business component, and a different interval can be configured for each business component. For example, a Service Request business component index could be scheduled to update every five minutes, and an Account business component index could be scheduled to update every ten minutes. Incremental indexing is supported for business components, and is not supported for the File System Connector.

Note: Incremental indexing is supported only on thin clients.

To enable incremental indexing for preconfigured search objects, see *Activating Search Run-Time Events*.

To enable incremental indexing for custom search objects, see *Activating Search Run-Time Events* and *Creating Search Run-Time Events for Custom Search Objects*.

Administering Asynchronous Indexing and Index Status Monitoring

This topic covers enabling and disabling the asynchronous indexing and index status monitoring features. These features are enabled by default. For information on configuring indexing mode settings in Siebel Tools, see *Configuring the Indexing Mode for Index Status Monitoring*.

To administer asynchronous indexing and index status monitoring for Oracle Secure Enterprise Search

1. Navigate to the Administration - Search OSES screen, then the Search Engine Settings view.
2. In the Driver Parameters applet, configure the Advanced Batching and Indexing setting as follows:
    - Set Advanced Batching And Indexing to True to enable the asynchronous indexing and index monitoring features.
    - Set Advanced Batching And Indexing to False to disable the asynchronous indexing and index monitoring features.
3. Restart the Siebel server.

Related Topics

Monitoring Index Status

Administering Batch Processing Status for FTP Indexing

Monitoring Index Status

The index status for FTP indexing mode can be monitored in the Search Index Status view. The data feed for indexing is collated into index batches, and submitted to the Oracle Secure Enterprise Search crawler for indexing. The number of records in each index batch is defined by the Batch Submit Size setting in the Search Engine Settings view. For information on configuring indexing mode settings in Siebel Tools, see *Configuring the Indexing Mode for Index Status Monitoring*.

To monitor the index status for Oracle Secure Enterprise Search

1. Navigate to the Administration - Search OSES screen, then the Search Index Status view.
2. Click Query to populate the table with the status of the index batches for the current indexing operation.
3. Verify the status for each index batch in the Status Indicator column.
4. Click Refresh to update the status for the records in the table.
5. Click Purge Table to clear the status records from the table.

Administering Batch Processing Status for FTP Indexing

You can perform the following batch processing operations on FTP index status information in the Search Index Status view.

- Purge Table. Deletes index status information from the table.
- Query. Queries the index status information for specific index records.
- Refresh. Refreshes the index status information to display the latest information, including any updates to the table.

According to the filter specification that is defined on the business component, batch processing operations (Purge Table, Query, Refresh) are performed on the FTP index status information. For more information, see *Checking Batch Status for FTP Index*.

Checking Batch Status for FTP Index

The following procedure shows you how to check the batch status on FTP index information.

To check batch status for FTP index for Oracle Secure Enterprise Search

1. In Siebel Tools, configure the indexing mode for index status monitoring:
   a. Set the search specification on the Search Index Batches BC business component to the following:

      ```
      Index Mode <> 'HTTP'
      ```

      This filter specifies to show records where Index Mode is FTP (not HTTP) only, and as a result batch processing operations will be performed on FTP index status information only.
   b. Update the repository and deliver the update, then start the Siebel application.

      For more information, see *Configuring the Indexing Mode for Index Status Monitoring*.
2. Delete the FTP index status information in the Siebel application as follows:
   a. Navigate to the Administration - Search OSES screen, then the Search Index Status view.

      The index batch information appears on screen.
   b. Review the status for each index batch in the Status Indicator column.
   c. Click Purge Table to delete the index status records from the table.

      All the FTP records are deleted.
3. Query the FTP index status information in the Siebel application as follows:
   a. Navigate to the Administration - Search OSES screen, then the Search Index Settings view.
   b. Select a Search Index Setting record (for example, Service Requests) and then click Index.

      This creates a Service Requests index category for the FTP index mode.
   c. Go to the Administration - Search OSES screen, then the Search Index Settings view.
   d. Click Query, and then click Go.

The new batches generated for the indexed Service Requests category appear on screen.

4. Refresh the FTP index status information in the Siebel application as follows:

   a. Navigate to the Administration - Search OSES screen, then the Search Index Settings view.
   b. Select a couple more Search Index Setting records and then click Index.

      For example, select SR Attachment and Solution (Call Center) to create the corresponding index categories for the FTP index mode.
   c. Go to the Administration - Search OSES screen, then the Search Index Settings view.
   d. Click Refresh.

      The new batches generated for the newly indexed SR Attachment and Solution (Call Center) categories appear on screen.

      When the index batches are queued for indexing, their status changes to Queued and the Status Indicator field shows a progress bar.

9 Setting Up Oracle Secure Enterprise Search for Siebel Remote

Setting Up Oracle Secure Enterprise Search for Siebel Remote

This chapter covers setting up Oracle Secure Enterprise Search for Siebel Remote. This chapter includes the following topics:

- *About Installing Search for the Siebel Remote Client*
- *Creating the Siebel Search Center Directory Structure on the Siebel Remote Client*
- *Installing Oracle Secure Enterprise Search for Siebel Remote*
- *Starting the DSM Listener*
- *Configuring Search Field Mapping Settings for Siebel Remote*
- *Adding the Siebel Mobile Search Administration Screen for Siebel Remote*
- *Verifying the Business Component Search Connector Settings for Siebel Remote*
- *Activating Search for Siebel Remote*
- *Configuring Search Engine Settings for Siebel Remote*
- *Activating Search Run-Time Events for Siebel Remote*
- *Synchronizing Siebel Search for Siebel Remote*
- *Search Functionality Supported for Siebel Remote*

About Installing Search for the Siebel Remote Client

This topic covers installation of Search for Siebel Remote, and installation of related Siebel components. The Siebel Mobile Client must be installed before installing Search for Siebel Remote. See *Siebel Remote and Replication Manager Administration Guide* for information on the Siebel Mobile Web Client and Siebel Remote. Siebel Search for Siebel Remote is supported in employee-facing applications, and is not supported in customer-facing applications.



Note: Siebel Search for Siebel Remote is supported only on the Windows operating system.

Upgrading from Siebel Search Version 7.x

Any custom search objects which were defined in Siebel Search Version 7.x must be redefined in the file SSC_DSM_Field-Mappings.xml. See *Configuring Index Mappings for Oracle Secure Enterprise Search*.

Creating the Siebel Search Center Directory Structure on the Siebel Remote Client

This topic covers creation of the directories that are required when using Siebel Search for Siebel Remote.

To create the Siebel Search Center Directory Structure on the Siebel Remote Client

1. Create the Siebel Search Center Config directory `D:\fs\ssc\Config\` under the Siebel File System on the Siebel Remote client.
2. Create a directory for storing the XML feed files on the Siebel Server, for example, `D:\fs\SSC\xmlidata`.
   The XML feed files are generated at runtime and temporarily stored in the `\xmlidata` folder. The feed files are automatically deleted once indexing completes.
3. Create a directory for storing the XML field mapping file on the Siebel Server, for example, `D:\fs\SSC\Config`.

Installing Oracle Secure Enterprise Search for Siebel Remote

Siebel Mobile Search crawls Siebel data in RSS feed format. The file ConfigRSS.exe is used to install and configure Siebel Mobile Search.

To install Oracle Secure Enterprise Search for Siebel Remote

1. Install the client for Siebel Remote.
   This installs dsm.zip to `<mobile client install dir>\BIN\`.
2. Extract the contents of dsm.zip to create the directory `<mobile client install dir>\BIN\dsm\`.
3. Copy the XML field mapping file from the mobile Client installation directory at `<mobile client install dir>\BIN\` to the config directory at `D:\fs\SSC\Config\`. The correct mapping file to copy is determined as follows:
   - Copy the file SSC_OSES_Field-Mappings.xml if you are using a Siebel application that operates across industries, such as Siebel Call Center, Siebel Sales, or Siebel Marketing.
   - Copy the file SIA_OSES_Field-Mappings.xml if you are using a Siebel industry application, such as Siebel Finance, Siebel Clinical, or Siebel Pharma.
4. Rename the XML field mapping file to SSC_DSM_Field-Mappings.xml.
5. Double-click on the file ConfigRSS.exe to install the Disconnected Search Module (DSM) client.
6. Complete the DSM Configuration fields. Some fields are described in the following table.

Field	Description
Install Directory	This is the install directory for the DSM log file and encrypted password file. The default value is:

Field	Description
	`C:\Documents and Settings\<UserName>\MyDocuments\Disconnected Search`
Feed Location	Location where the XML-based indexable data files will be generated. Set the value to: `D:\fs\SSC\xmlidata`
HTTP Port	This is the port of the DSM listener. The default value is `8095`. This value will be required when configuring the DSM Index Listener field in the Mobile Search administration view.
User Name	Create a user name for DSM. This value is also required when setting the DSM Username setting in the Search Engine Settings view.
Password	Create a password for DSM. This value is also required when setting the DSM Password setting in the Search Engine Settings view.

7. Click Install.

Starting the DSM Listener

This topic covers enabling Siebel Search for Siebel Remote by starting the Disconnected Search Module (DSM) Listener.

To start the Disconnected Search Module Listener

1. Double-click on the file SearchAPI.exe on the Siebel Mobile client.

   This file is located at `<mobile client install dir>\BIN\dsm\`.
2. Enter the DSM User Name and Password.
3. Select Debug Mode to enable debug logging level.

   This setting is optional, and is only required if you wish to view logging information.
4. Click Start Listener.

Configuring Search Field Mapping Settings for Siebel Remote

This topic covers configuring the Search field mapping settings for Siebel Remote The settings enclosed in percentage tags in the field mapping file must be configured to Search for Siebel Remote.

To configure Search field mapping settings for Siebel Remote

1. Open the file D:\fs\SSC\Config\SSC_DSM_Field-Mappings.xml in an XML or text editor.
2. Configure all fields enclosed in percentage tags. The fields are described in the following table:

Field	Description
%webserver%	Set the value to the IP address of the Mobile Client host computer.
%objmgr%	Set the object manager value to the application that is running, for example, CallCenter or Fins.
%lang%	Set the value to the language which the Siebel application is configured for, for example, the value for English is enu.
%hostName%	Set the value to the IP address of the Mobile Client host computer.

Adding the Siebel Mobile Search Administration Screen for Siebel Remote

The Siebel Mobile Search Administration screen must be added for each application project in Siebel Tools.

Note: The Mobile Search Administration screen has already been added for the Call Center application.

To add the Mobile Search Administration screen for Siebel Remote

1. Connect to Tools.
2. From the Object Explorer, expand the Application object type.
3. Select the application in the Object Explorer.
   Note the project to which the application belongs.

4. Lock the application project.
5. From the Object Explorer, expand the Application object type.
6. Select Screen Menu Item.
7. Choose Edit, and then New Record, and use the information in the following table to define the object properties:

Property	Description
Screen	Set the value to Search Mobile Admin View Screen.
Sequence	Use Screen View Sequence Editor to determine the sequence of views. Do not edit the Sequence property of the Screen View Object manually. See *Configuring Siebel Business Applications* for defining Sequence for Screen View Objects.
Text - String Reference	Set the value to: `SBL_ADMINISTRATION_-_MOBILE_SEARCH`

8. Compile the changes.

Verifying the Business Component Search Connector Settings for Siebel Remote

The Search business component connector for Siebel Remote is preconfigured. This task covers verifying the connector settings.

To verify the Search Connector settings for Siebel Remote

1. Navigate to the Administration - Mobile Search screen, then the Search Connector Settings view.

   The Search Connector Settings List applet is displayed.
2. Verify the settings in the following table. Values are case-sensitive.

Field	Description
Name	The preconfigured value must be set to Mobile Business Component.
Library Name	The preconfigured value must be set to buscomp.
Engine Name	The preconfigured value must be set to DSM.

Activating Search for Siebel Remote

Siebel Search for Siebel Remote is activated by selecting the Default Flag option in the Search Engine Settings view. Only one search engine can be activated at any one time—make sure that the Default Flg option is selected for just one search engine.

To activate Search for Siebel Remote

1. Navigate to Administration - Mobile Search screen, then the Search Engine Settings view.
2. Select the Default Flag option for DSM Search Engine.

Configuring Search Engine Settings for Siebel Remote

This topic covers configuration of the Search Engine Settings view for Siebel Remote.

To configure search engine settings for Siebel Remote

1. Navigate to the Administration - Mobile Search screen, then the Search Engine Settings view.
2. Complete the search engine fields described in the following.

Field	Description
Batch Submit Size	The number of records submitted at a time in each feed for indexing. Set the value to less than or equal to 1500. The Object Manager query performance, search engine footprint size, and Siebel Server specification are used in determining optimum Batch Submit Size.
DSM Index Listener	Set the value to `http://<localhost>:<HTTP Port>/?index`, where HTTP Port is the port of the DSM Listener. HTTP Port is defined when installing the Mobile Search client. The default value is: `http://localhost:8095/?index`
DSM Password	This is the password that was created when installing the DSM client. See *Installing Oracle Secure Enterprise Search for Siebel Remote*.
DSM Username	This is the user name that was created when installing the DSM client. See *Installing Oracle Secure Enterprise Search for Siebel Remote*.
Dupmarked	This setting configures the marking of duplicates in the result set. Set the value to False.

Field	Description
Dupremoved	This setting configures the removal of duplicates from the result set. Set the value to True.
Filename	This value configures the path of the DSM field mapping file SSC_DSM_Field-Mappings.xml on the Mobile client. Set the value to: `D:\fs\SSC\Config\SSC_DSM_Field-Mappings.xml`
Recordcount	This setting configures the inclusion of an estimate in the result for the number of records in the result set. Set the value to True.
Shared Search UNC Location	This is the Siebel Search Center location for storing configuration and XML data files. It is the parent directory of the Xmlidata directory. The address format is `D:\fs\SSC`.
WebServer Address	URL for the Search Service. The address format is `http://localhost:<HTTP_Port>/`. The default value is: `http://localhost:8095/`
XML Indexable Data Location	This is the Siebel Search Center location where the XML feed files are temporarily stored for the DSM Listener to access and index. The path format is: `D:\fs\SSC\xmlidata\`

3. Select Save Record on the list applet.
4. Log out and log in to the Mobile Client for the changes to take effect.

Note: The Siebel Server must be restarted every time a change is made to Search Engine Settings configuration.

Process of Setting Up the Index Definition for the Siebel Remote Client

Search Categories for each Siebel application are defined in Search Definition groupings in the Search Definition view. This view can be used for creating or customizing Search Definitions and Search Definition Categories. This topic covers configuring the Mobile Client Search Definition in the Siebel Mobile Search administration UI, and then adding the definition to the application configuration file.

To set up the index definition for the Search mobile client, perform the following tasks:

- *Configuring the Search Definition for Siebel Remote*
- *Configuring the Application Configuration File*

Configuring the Search Definition for Siebel Remote

This topic covers configuring the Mobile Client Search definition in the Search Definition view of the Administration - Mobile Search screen. The list of Categories displayed in the Search Index Settings view is determined by the default Search Definition in the Search Definition view.

To configure the default search definition for Siebel Remote

1. Navigate to Administration - Mobile Search screen, then the Search Definition view.
2. Select Mobile Client Search Definition.
3. Select the Default Flg option.

Configuring the Application Configuration File

This topic covers configuring the Search Definition in the SearchDefName parameter of the application configuration file for the Siebel Mobile Client. Application configuration file names are in the format <application>.`cfg`, for example, the file shm.cfg is the Siebel Hospitality application configuration file, and the file uagent.cfg is the Siebel Call Center application configuration file. Verify that you are using the correct application configuration file by checking the ApplicationName parameter in the file.

Note: This configuration change must be applied to each application configuration file for each language in the enterprise.

To configure the application configuration file

1. Open the application configuration file in a text editor. On Windows the file is located at: <install_dir>bin \<language>\<application>.cfg
2. Go to the SIEBEL section of the configuration file.
3. Change the value of the SearchDefName parameter to Mobile Client Search Definition, and save the changes.

Activating Search Run-Time Events for Siebel Remote

Activating preconfigured Search run-time events is required to enable refresh indexing. Search runtime events monitor create, update and delete events executed on Search Objects in the data repository. The Action Sets create records in the transaction table and trigger the Search Content business service method UpdateIndex.

To activate the Search run-time events for Siebel Remote

1. Navigate to Administration - Runtime Events screen, then the Action Sets view.
2. Query on the Update Index Action Set.
3. Select the Active and Enable Export options to activate the Update Index run-time events.

Note: Incremental indexing is not supported for disconnected Mobile Search.

Synchronizing Siebel Search for Siebel Remote

See *Siebel Remote and Replication Manager Administration Guide* for information on synchronizing a Mobile Web Client with the Siebel Remote server.

Search Functionality Supported for Siebel Remote

The following table summarizes the Search functionality available for Siebel Remote.

Functionality	Supported for Siebel Remote
Siebel Open UI	No
Business component indexing	Yes
File system indexing	No
Web source indexing	No
Database source indexing	No
IMAP email source indexing	No
Lotus notes source indexing	No
Secure indexing	No
Refresh indexing	Yes
Incremental indexing	Manual incremental indexing supported.
Asynchronous indexing	No
Index status monitoring	No
Real time database queries	No. Searches are run against search indices.

Functionality	Supported for Siebel Remote
Full text search	Yes
Keyword search	Yes
Automated suggested keywords	No
Filter field search (also called parametric search)	Yes
Wildcard search	Yes. Does not apply to punctuation characters, such as spaces, or commas. Applies to characters only within a word.
Case insensitive search	Yes
Boolean operators	Yes. Supports AND and OR Boolean operators.
Searches on content in attachments	Yes
Searches on external data sources and file systems	Yes
Search by file format	No
Associate option in search results	Yes
Password Encryption	No

10 Preconfigured Search Objects for Oracle Secure Enterprise Search

Preconfigured Search Objects for Oracle Secure Enterprise Search

This chapter lists the Oracle Secure Enterprise Search objects that come preconfigured with Oracle's Siebel Search, and the application and Search Definition mappings. This chapter includes the following topics:

- *Call Center Searchable Objects*
- *Self Service Searchable Objects*
- *Sales Searchable Objects*
- *Service Searchable Objects*
- *Application and Search Definition Mappings*

Call Center Searchable Objects

This topic lists the business components that are preconfigured as searchable objects in the Call Center Search Definition:

- Account
- Catalog Category
- Contact
- Decision issue
- Employee
- Internal Product
- Opportunity
- Service Request
- Service Request Attachment
- Solution
- SR Resolution Item

Self Service Searchable Objects

This topic lists the business components that are preconfigured as searchable objects in the Self Service Search Definition:

- Documentation
- Downloads
- Product Literature
- Product News
- Resolution Documents
- Solution

Sales Searchable Objects

This topic lists the business components that are preconfigured as searchable objects in the Sales Search Definition:

- Catalog Category
- Decision issue
- Internal Product
- Sales Tool

Service Searchable Objects

This topic lists the business components that are preconfigured as searchable objects in the Sales Search Definition:

- Internal Product
- Sales Tool
- Solution
- SR Resolution Item

To create or customize Search objects for Oracle Secure Enterprise Search integration, see *Configuring Index Mappings for Oracle Secure Enterprise Search*.

Application and Search Definition Mappings

The following table lists the preconfigured mappings in the application configuration files between Siebel Business Applications and Search Definitions. See *Creating a New Index Definition* for information on creating and customizing Search Definitions.

Siebel Application	Search Definition
Siebel Automotive	Call Center
Siebel Call Center	Call Center
Siebel Consumer Sector	Call Center Definition
Siebel eBanking	eBanking Definition
Siebel eBriefings	eBriefings Definition
Siebel eChannel	eChannel Definition
Siebel eChannel for CG	eChannel Definition
Siebel eChannel for CME	Call Center Definition
Siebel eConsumer	eCustomer Definition
Siebel eConsumerPharma	eConsumerPharma Definition
Siebel eCustomer	eCustomer Definition
Siebel eCustomer for CME	eCustomer Definition
Siebel eDealer	eChannel Definition
Siebel eMail Response	Service Definition
Siebel Web Marketing	Web Marketing Definition
Siebel Energy	Call Center Definition
Siebel eProfessionalPharma	eProfessionalPharma Definition
Siebel ERM	ePortal Definition
Siebel ERM Administration	ERM Administrator Definition
Siebel ERM Embedded	ePortal Definition
Siebel ERM Portal	ePortal Definition

Siebel Application	Search Definition
Siebel eSales	eSales Definition
Siebel eSales for CME	eSales Definition
Siebel Self Service	Self Service Definition
Siebel eSitesClinical	eSitesClinical Definition
Siebel Field Service	Service Definition
Siebel Financial eBrokerage	eBanking Definition
Siebel Financial eChannel	Call Center Definition
Siebel Financial eCustomer	eCustomer Definition
Siebel Financial eEnrollment	eService Definition
Siebel Financial eService	eService Definition
Siebel Financial Services	Call Center Definition
Siebel Financial Services Marketing	Marketing Definition
Siebel FINS eSales	FINSeSales Definition
Siebel Hospitality	Call Center Definition
Siebel Industry Marketing Enterprise	Marketing Definition
Siebel Insurance	Not supported
Siebel Life Sciences	Call Center Definition
Siebel Life Sciences	Sales Definition
Siebel Loyalty	Call Center Definition
Siebel Loyalty Customer Portal	eCustomer Definition
Siebel Loyalty Partner Portal	eChannel Definition

Siebel Application	Search Definition
Siebel Marketing Enterprise	Marketing Definition
Siebel Medical	Call Center Definition
Siebel Oil, Gas & Chemicals	Call Center Definition
Siebel Partner Manager	Partner Manager Definition
Siebel Power Communications	Call Center Definition
Siebel Public Sector	Call Center Definition
Siebel Sales Enterprise	Sales Definition
Siebel Transportation	Call Center Definition
Siebel Travel	Call Center Definition
Siebel Universal Customer Master	Call Center Definition

11 Filter Search Specifications Syntax for Oracle Secure Enterprise Search

Filter Search Specifications Syntax for Oracle Secure Enterprise Search

This chapter covers the syntax for filtering the index record-set to incorporate custom business rules. See *Administering Siebel Search Index Settings for Oracle Secure Enterprise Search* for information on using the Filter Search Spec field. This chapter includes the topic: *Filter Search Specification Syntax*.

Filter Search Specification Syntax

This topic describes the supported syntax elements for filter search specifications, which are used for filtering the index record-set. Filter search specifications are specified in the Search Definition and Search Index Settings views of the Administration - Search OSES screen.

This topic includes the following information:

- *Precedence*
- *Comparison Operators*
- *Logical Operators*
- *Pattern Matching with LIKE and NOT LIKE*
- *Functions in Calculation Expressions*

Precedence

Precedence refers to the order in which the various search operators within the filter search query specification are evaluated. The following table shows the levels of precedence. Expressions within parentheses are evaluated first. Using parentheses can alter the order of precedence within an expression.

Oracle's Siebel Business Applications evaluate the expression within the parentheses first, before evaluating the expression outside.

Level	Operator
1	()
2	NOT
3	AND

Level	Operator
4	OR

Comparison Operators

The following table describes the purpose of each comparison operator, and gives an example of how it is used.

Operator	Purpose	Example
=	Equality Text	[Publish External] = “Y"
>	Inequality text	[Role] > LookupValue (“ROLE_TYPE", “Manager")
>	Greater than	[Start Date] > Today()
	Less than	[End Date] Today() + 4
>=	Greater than or equal to	[Start Date] >= Today()
=	Less than or equal to	[End Date] = Today() - 4

Note: The last four operators are used only for Date fields.

Logical Operators

The following table explains what a value of TRUE or FALSE means for each logical operator.

Operator	Returns TRUE	Returns FALSE
AND	If all component conditions evaluate to TRUE	If any component condition evaluates to FALSE
OR	If any component condition evaluates to TRUE	If all component conditions evaluate to FALSE

Pattern Matching with LIKE and NOT LIKE

The LIKE operator is used in character string comparisons with pattern matching.

The syntax is as follows:

```
char1
 LIKE
char2
```

where:

- char1 is the value to be compared with the pattern.
- char2 is the pattern to which char1 is compared. The NOT logical operator can be used in conjunction with LIKE to exclude patterns.

The syntax including the NOT logical operator is one of the following:

```
 char1 NOT LIKE char2
NOT (char1 LIKE char2)
```

While the equal (=) operator does exact matching, the LIKE operator matches a portion of one character value to another. Patterns can use special characters to denote different characters. These characters are given in the following table.

Character	Purpose	Example
*	Zero or more characters	[Sales Type] LIKE Sales* returns all records whose [Sales Type] value starts with the characters Sales, as in Sales-Brochure, Sales-Presentation, and so on.
?	One character	[Sales Type] NOT LIKE Sale? returns all records whose [Sales Type] value was five characters long, and did not start with the letters Sales. Records with the word Sales would not be returned.

Functions in Calculation Expressions

Functions that can be used in the filter search specification are listed in the following table.

Function	Purpose	Example
GetProfileAttr ("[Attribute]")	String	Returns the value stored in the profile attribute if that attribute has been defined. Used in personalization to retrieve values of attributes in a user profile and to pass information from a script to the UI. Set a session-specific personalization attribute equal to

Function	Purpose	Example
		the value of the shared global, and reference the personalization attribute in a calculated field. **Note:** For an undefined attribute or for an attribute that has not been set up, GetProfileAttr returns NULL. Search Server does not support NULL values in the query.
LookupValue (type, lang_ind_code)	String	Finds a row in S_LST_OF_VAL table where the TYPE column matches the type argument, the CODE column matches the lang_ind_code argument, and the LANG_ID column matches the language code of the currently active language. Returns the display value (the VAL column) for the row. This function is used to obtain the translation of the specified untranslated value in the specified LOV into the currently active language.
Today	Date	Today's date (in the format mm/dd/yy).
GetValidCatalogCategories()	String	Returns a list of valid catalog categories for the current logged in user.

Filter Search Specification Examples

Assigning a search expression to an object definition's Search Specification property is similar to the predefined query's expression; however, identifying the business component and specifying the reserved word Search is not required.

Note: The Search Specification expression must be on one line. If more than one line is used the search specification might not be processed correctly.

The following are examples of filter search specification syntax:

- [Close Date] > "04/15/07"
- [Sales Tool Type] LIKE "Cal*"
- [Start Date] >= Today () AND [End Date] <= Today() + 100
- [Solution Type] = LookupValue ("SOLUTION_TYPE", "Solution") AND ([Publish External] = "Y"
- [PriceListId]=GetProfileAttr("DefaultPriceListId")

Note: For date formats in filter Search Specification, use the business component format. To reference a field value, you must use [Filter Field Name]. Also, string constants must be enclosed in double quotation marks ("string").

The fields declared must exist within the designated search filter field object definition.

12 API Examples for Oracle Secure Enterprise Search

API Examples for Oracle Secure Enterprise Search

This chapter lists Oracle Secure Enterprise Search Open API sample formats for the Search and Index methods, and the feed file. This chapter includes the following topics:

- *Search inputArgs Example*
- *Search outputArgs Example*
- *Feed File Example*
- *Index inputArgs Example*

Search inputArgs Example

This XML listing displays sample format and values for `inputArgs` when the Search method is invoked from the InvokeMethod method.

```
<?xml version="1.0" encoding="UTF-8"?>
<?Siebel-Property-Set EscapeNames="true"?>

<PropertySet
 XParam2="Val2"
 Search_spcType="BASIC"
 EngineName="XSearch"
 BCType="1#15#Service Request"
 Criteria=""
 Navigation="2#7#Account4#Area"
 Browser="FALSE"
 Filename="\\<server>\filesystem\SSC\Config\<application>_Field-Mappings.xml"
 Shared_spcSearch_spcUNC_spcLocation="\\<server>\filesystem\SSC"
 _XML_spcIndexable_spcData_spcLocation="\\<server>\filesystem\SSC\xmlidata\"
 Sort=""
 DefaultFrom="0"
 XParam1="Value1"
 Context="SENSITIVE"
 DefaultCriteria=""
 DefaultContext="SENSITIVE"
 AdptClassName="\\<server>\fs\XSearchAdapter.dll"
 Batch_spcSplit_spcSize="1500"
 DefaultRecordsPerPage="10"
 SSC_spcFTP_spcLocation="ftp://<server>/"
 AvailableFields="22#17#Service Request@@8#Abstract7#Account4#Area15#Attachment List7#BC
 Name3#CSN7#Created10#Created By11#Description2#Id12#Organization5#Owner23#Primary Organization
 Id20#Requestor First Name19#Requestor Last Name15#Resolution Code9#SR Number6#Status8#Sub-
Area7#Updated10#Updated By"
 RecordsPerPage="10"
 Query=""
 DefaultSort=""
 SubOperation="Search"
 New_spcSearch="0"
```

```
 EngineId="42-CC0HV"
 KeyOperator="OR"
 DefaultTo="10"
 SelectedSearch="Service Requests"
 Freetext=""
 Collection="1#7#buscomp"
 DefaultBrowser="FALSE"
 To="9"
 LogOperator="AND"
 Batch_spcSubmit_spcSize="1000"
 Keyword=""
 From="0">

</PropertySet>
```

Search outputArgs Example

This XML listing displays sample format and values for `outputArgs` when the Search method is invoked from the InvokeMethod method.

```
<?xml version ="1.0" encoding ="UTF-16"?>
<?XsearchAdapter-XML EscapeNames="true"?>
<OutputBlock To ="9" TotalRecords ="13" From ="0">

<OutputBlock
 Rowid ="1-260HR"
 BCType ="Solution"
 DocumentType ="BusCompRecord"
 Summary ="NUOVITESTBENCHMARKSULLASCALABILITA&apos;DISIEBELSALES:sonooradisponibilisuwww.siebel.com|
[Author:ITA_CCHE][Name:ITA_SiebelSalesProductNews7.40.01"
 Date ="2002-02-26"
 Title ="ITA_SiebelSalesProductNews7.40.01"
 DataSource ="Solution"
 Location =""></OutputBlock>

<OutputBlock
 Rowid ="99-27Y6K"
 BCType ="Solution"
 DocumentType ="BusCompRecord"
 Summary ="eMRSolution6|[Author:SADMIN][Name:eMRSolution6][Type:Solution][Status:Approved]"
 Date ="1979-12-31"
 Title ="eMRSolution6"
 DataSource ="Solution"
 Location =""></OutputBlock>

<OutputBlock
 Rowid ="99-27Y6B"
 BCType ="Solution"
 DocumentType ="BusCompRecord"
 Summary ="eMRSolution|[Author:SADMIN][Name:eMRSolution4][Type:Solution][Status:Approved]"
 Date ="1979-12-31"
 Title ="eMRSolution4"
 DataSource ="Solution"
 Location =""></OutputBlock>

<OutputBlock
 Rowid ="1-2G2AY"
 BCType ="Solution"
```

```
 DocumentType ="BusCompRecord"
 Summary ="HowtoSubmitanSRforRSATokenIssuesWhenlogginganSRforRSAtokensonHelpDeskOnline,youwillwanttoensure/
indicatethefollowing:NewRequests1.SR"
 Date ="2002-06-01"
 Title ="RSA-HowtosubmitanSRforanRSAToken"
 DataSource ="Solution"
 Location =""></OutputBlock>

<OutputBlock
 Rowid ="1-26GY2"
 BCType ="Solution"
 DocumentType ="BusCompRecord"
 Summary
 ="SmartScriptandeSmartScriptusethesamescriptstructureandworkexactlythesame.Thismeansthatyoucancreateas
 Date ="2002-03-05"
 Title ="FRA-SmartScripteteSmartScript"
 DataSource ="Solution"
 Location =""></OutputBlock>

<OutputBlock
 Rowid ="1-2G2AW"
 BCType ="Solution"
 DocumentType ="BusCompRecord"
 Summary ="HowtoOrderanRSAToken1)ContactITCustomerCare"
 Date ="2002-06-01"
 Title ="RSA-OrderinganRSAToken"
 DataSource ="Solution"
 Location =""></OutputBlock>

<OutputBlock
 Rowid ="1-2C38Z"
 BCType ="Solution"
 DocumentType ="BusCompRecord"
 Summary
 ="OrderDocumentation(forInternalEmployees)MostSiebelDocumentationandLiteratureitemscanbedownloadedinPDFformatfromth
 Date ="2002-05-30"
 Title ="MfgOps-Q3"
 DataSource ="Solution"
 Location =""></OutputBlock>

<OutputBlock
 Rowid ="1-EZTJ"
 BCType ="Solution"
 DocumentType ="BusCompRecord"
 Summary ="Name:1-EZTJ][Type:ResolutionItem]"
 Date ="2001-07-17"
 Title ="1-EZTJ"
 DataSource ="Solution"
 Location =""></OutputBlock>

</OutputBlock>
```

Feed File Example

This is a sample index feed file for two records. Oracle's Siebel application creates the XML feed files which are input into the index operation.

```
<?xml version="1.0" encoding="UTF-8" ?>

- <rss version="2.0" xsi:schemaLocation="http://xmlns.oracle.com/orarss.xsd"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsd="http://
www.w3.org/2001/XMLSchema">

- <channel>
 <title>Siebel Search Center</title>
 <link>http://www.oracle.com/apps/rss</link>
 <description>This channel contains feed for Siebel BusComp data.</description>
 <lastBuildDate>2008-05-13T08:03:39.00Z</lastBuildDate>
- <channelDesc xmlns="http://xmlns.oracle.com/orarss">
 <sourceName>buscomp</sourceName>
 <batchId>2008-05-13_08-03-39</batchId>
 <itemCount>2</itemCount>
 </channelDesc>
- <item>

 <link>http://<server>:<port>/siebel/app/callcenter/
enu?SWECmd=GotoView&SWEView=User+Catalog+Explorer+View&SWERF=1&SWEHo=sdchs21n381&S
WEBU=1&SWEApplet0=InfoCenter+Explorer+List+Applet&SWERowId0=1-12931</link>

- <itemDesc xmlns="http://xmlns.oracle.com/orarss" operation="insert">
- <documentMetadata>

 <accessURL>http://<server>:<port>/siebel/app/callcenter/
enu?SWECmd=GotoView&SWEView=#VIEWNAME#&SWERF=1&SWEHo=sdchs21n381&SWEBU=1&SWEApplet
0=#APPLETNAME#&SWERowId0=#ROWID#</accessURL>

 <docAttr name="Title">Siebel Distance Learning - ESN</docAttr>
 <docAttr name="status">Approved</docAttr>
 </documentMetadata>
- <documentContent>
 <content>[Name:Siebel Distance Learning - ESN] [Status:Approved]</content>
 </documentContent>
- <documentAcl>
 <securityAttr name="sblvisibilityid">PUB</securityAttr>
 </documentAcl>
- <documentInfo>
 <status>STATUS_OK_FOR_INDEX</status>
 </documentInfo>
 </itemDesc>
 </item>
- <item>

 <link>http://<server>:<port>/siebel/app/callcenter/
enu?SWECmd=GotoView&SWEView=User+Catalog+Explorer+View&SWERF=1&SWEHo=sdchs21n381&S
WEBU=1&SWEApplet0=InfoCenter+Explorer+List+Applet&SWERowId0=99-27Y6K</link>

- <itemDesc xmlns="http://xmlns.oracle.com/orarss" operation="insert">
- <documentMetadata>

 <accessURL>http://<server>:<port>/siebel/app/callcenter/
enu?SWECmd=GotoView&SWEView=#VIEWNAME#&SWERF=1&SWEHo=sdchs21n381&SWEBU=1&SWEApplet
0=#APPLETNAME#&SWERowId0=#ROWID#</accessURL>
```

```
 <docAttr name="Title">eMR Solution 6</docAttr>
 <docAttr name="status">Approved</docAttr>
 </documentMetadata>
- <documentContent>
```

Index inputArgs Example

This XML listing displays sample format and values for inputArgs when the Index method is invoked from the InvokeMethod method.

```
<?xml version="1.0" encoding="UTF-8"?><?Siebel-Property-Set EscapeNames="true"?>

<PropertySet
 Category_spcId="04-KFT4L"
 EngineName="XSearch"
 Search_spcSpecification="Id &gt;= &quot;1-1009T&quot; AND Id &lt;= &quot;99-4C12M&quot;"
 _XML_spcIndexable_spcData_spcLocation="\\<server>\fs\SSC\xmlidata\"
 Shared_spcSearch_spcUNC_spcLocation=\\<server>\fs\SSCFilename="\\<server>\fs\ssc\config\SSC_OSES_Field-
Mappings.xml"
 Filter_spcSpec=""CategoryName="Solution (Call Center)"
 XParam="Xval"
 Batch_spcSplit_spcSize="1500"
 AdptClassName="\\<server>\fs\XSearchAdapter.dll"
 Search_spcBC_spcName="Solution"
 Connector_spcId="04-KFT4D"
 Adapter_spcInstance_spcCount="0"
 SSC_spcFTP_spcLocation="ftp://<server>/"
 Type="buscomp"
 EngineId="42-CLX4P"
 SearchCategoryName="Solution (Call Center)"
 Batch_spcSubmit_spcSize="1000"
 Operation="Index">

<PropertySet
 Seq_spcNum="" Field_spcType="" Weight_spcFactor="" Searchable_spcFlg="Y" Field_spcName="Author By Name"
 Navigable_spcFlg="N">
</PropertySet>

<PropertySet
 Seq_spcNum="" Field_spcType="" Weight_spcFactor="" Searchable_spcFlg="N" Field_spcName="BC Name"
 Navigable_spcFlg="N">
</PropertySet>

<PropertySet
 Seq_spcNum="" Field_spcType="" Weight_spcFactor="" Searchable_spcFlg="N" Field_spcName="Catalog Category
 Name" Navigable_spcFlg="N">
</PropertySet>

</PropertySet>
```