



Siebel Search Administration Guide

Version 8.0, Rev. G
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What's New in This Release

Siebel Search Administration Guide covers how to use Oracle's Siebel Search application. It includes tasks such as configuring, and integrating with Oracle Secure Enterprise Search. For customers using the legacy Siebel Search-FAST integration, see *Siebel Search Administration Guide Addendum for FAST InStream*.

What's New in Siebel Search Administration Guide, Version 8.0, Rev. G

Table 1 lists the changes described in this version of the documentation to support Release 8.0.0.12 of the software.

Table 1. Changes in Siebel Search Administration Guide, Version 8.0, Rev. G

Topic	Description
"Features Supported for Find, Search, and Mobile Search" on page 20	Modified topic. The following features have been added for HTTP indexing: <ul style="list-style-type: none">■ Password encryption■ Secure indexing■ Monitoring batch processing for HTTP indexing
"Enabling FTP or HTTP Indexing" on page 27	New topic. Siebel Search provides the ability to index over FTP or index over HTTP. This topic covers switching between FTP and HTTP indexing.
"Configuring the RSS Crawler for HTTP Indexing" on page 31	New topic. This topic describes how to configure the Oracle Secure Enterprise Search Crawler for indexing over HTTP.
"Configuring Siebel Search Engine Settings" on page 36	Modified topic. The following settings have been added for HTTP indexing: <ul style="list-style-type: none">■ Feed URL Prefix■ Send Index Feed Via HTTP■ Use Session Mode The following settings have been modified for HTTP indexing: <ul style="list-style-type: none">■ Batch Split Size■ Batch Submit Size■ Feed Access Password
"Creating a Server Repeating Job for HTTP Indexing" on page 56	New topic. It describes how to create the Search Schedule Monitor repeating job for HTTP indexing.

Table 1. Changes in Siebel Search Administration Guide, Version 8.0, Rev. G

Topic	Description
"Configuring the Eapps.cfg File for HTTP Indexing" on page 57	New topic. It describes how to configure session tracking for HTTP indexing.
"Configuring Secure Sockets Layer Authentication for HTTP Indexing" on page 58	New topic. It describes how to configure SSL authentication for HTTP indexing.
"Importing the SSL Certificate for HTTP Indexing" on page 58	New topic. It describes how to import the SSL certificate.
"Configuring Single Sign-On Authentication for HTTP Indexing" on page 58	New topic. It describes how to configure SSO authentication for HTTP indexing.
"Configuring User Authentication for Search Queries" on page 59	New topic. It describes how to configure end user authentication for search queries.
"Monitoring Batch Processing for HTTP Indexing" on page 85	New topic. It describes how to monitor batch processing for HTTP indexing.

What's New in Siebel Search Administration Guide, Version 8.0, Rev. F

Table 2 lists the changes described in this version of the documentation to support Release 8.0.0.7 of the software.

Table 2. Changes in Siebel Search Administration Guide, Version 8.0, Rev. F

Topic	Description
Remote Administration “Configuring Siebel Search Engine Settings” on page 36	Modified topic. It has been updated to include the following Oracle Secure Enterprise Search remote administration settings: <ul style="list-style-type: none"> ■ Admin API Namespace ■ Admin API Webserver Address ■ Schedule Name ■ Search Engine Config Filename ■ Web Service Endpoint Address ■ Web Service Endpoint Password ■ Web Service Endpoint Username
Remote Administration “Configuring the Siebel Business Component Connector” on page 42	Modified topic. It has been updated to include the following Oracle Secure Enterprise Search remote administration settings: <ul style="list-style-type: none"> ■ Configuration URL ■ Feed Access Password ■ Feed Access User ID ■ Scratch Directory ■ Type ■ className ■ jarFile
Remote Administration “Activating the Siebel Identity Plugin Manager for Oracle Secure Enterprise Search” on page 43	New topic. This topic covers connection to the Oracle Secure Enterprise Search server. The Oracle Secure Enterprise Search Federation Trusted Entities and Siebel Identity Plugin Manager are activated from Oracle’s Siebel CRM administration UI by remote administration.
Remote Administration “Deploying the Business Component Source” on page 45	New topic. This topic covers remote administration of the Oracle Secure Enterprise Search Connector. This task configures the Oracle Secure Enterprise Search business component source, source group, and schedule.
Remote Administration “Configuring the Siebel File System Connector” on page 48	Modified topic. It has been updated for remote administration of the Oracle Secure Enterprise Search file system source and schedule.

Table 2. Changes in Siebel Search Administration Guide, Version 8.0, Rev. F

Topic	Description
Field Weights and Automated Keywords “Creating the Siebel Search Center Directory Structure on the Siebel Server” on page 26	Modified topic. It has been updated to include the file Search_Engine_Config.xml, which is used to support automated keywords and dynamic weights.
Field Weights “Administering Field Weighting” on page 90	New topic. This topic covers administering field weighting, to determine a field’s ranking in the search results.
Automated Keywords “Administering Automated Keywords” on page 91	New topic. This topic covers verifying the Oracle Secure Enterprise Search cluster settings that are required for generating Siebel Search automated keywords.
Basic Search Operators “Performing a Basic Search Operation” on page 108	Modified topic. It has been updated to include the following search operations: <ul style="list-style-type: none"> ■ Exclusion Search ■ Phrase Search

Table 2. Changes in Siebel Search Administration Guide, Version 8.0, Rev. F

Topic	Description
<p>Advanced Search Operators</p> <p>“Performing an Advanced Search Operation” on page 110</p>	<p>Modified topic. It has been updated to include the following predefined searches:</p> <ul style="list-style-type: none"> ■ All these words ■ Any of these words ■ Exact phrase ■ None of these words <p>It has been updated to include searching by the following file formats:</p> <ul style="list-style-type: none"> ■ All ■ Microsoft Excel ■ Microsoft PowerPoint ■ Microsoft Word ■ PDF
<p>“Defining Index Elements” on page 69</p>	<p>Modified topic. It has been updated to reflect the fact that the following attributes are not supported:</p> <ul style="list-style-type: none"> ■ is-id ■ id-rank ■ on-name ■ nv-name

What's New in Siebel Search Administration Guide, Version 8.0, Rev. E

Table 3 lists the changes described in this version of the documentation to support Release 8.0.0.6 of the software.

Table 3. Changes in Siebel Search Administration Guide, Version 8.0, Rev. E

Topic	Description
"Select the Connector for which settings have been changed, and click Update." on page 53	New topic. It describes setting up the Oracle Secure Enterprise Search File System Connector.
"Process of Setting Up the Web Crawler Source and Connector for Oracle Secure Enterprise Search Integration" on page 50	New topic. It describes setting up the Oracle Secure Enterprise Search Web Crawler Connector.
"Configuring Siebel Search Engine Settings" on page 36	Modified topic. Updated to include corrections to the preconfigured values for Dupmarked and Dupremoved.
Chapter 4, "Setting Up Disconnected Mobile Search"	New chapter. This chapter covers installation and configuration of Oracle's Siebel Mobile Search client.
"Defining Index Elements" on page 69	Modified topic. Updated to include index and available field mappings for custom business components.
"Configuring the Search Results View" on page 87	New topic. It describes how to configure the Search results in either quick search mode or results retention mode
"Configuring Pick Views for Search and Attach Records" on page 88	New topic. It describes enabling Find and Attach functionality in Siebel Tools.
"Creating Preview Views for Search" on page 89	New topic. It describes configuring preview views in Siebel Tools.
"Configuring the Search Definition on the Siebel Developer Web Client" on page 80	New topic. It describes configuring the Search Definition for the Siebel Developer Web Client.

What's New in Siebel Search Administration Guide, Version 8.0, Rev. D

Table 4 lists the changes described in this version of the documentation to support Release 8.0.0.5 of the software.

Table 4. Changes in Siebel Search Administration Guide, Version 8.0, Rev. D

Topic	Description
“Administering Workflow Management Components” on page 35	This topic covers enabling the Workflow Management Server components. All Workflow Management components must be enabled for incremental and refresh indexing.
“Verifying the Oracle Secure Enterprise Search Source for the Business Component Connector” on page 45	The Oracle Secure Enterprise Search Authentication Type and Realm fields have been added.
“Creating Server Repeating Jobs for Incremental Indexing” on page 55	This topic has been updated to include Job Templates.
“Find Pick View Object” on page 99	This topic provides an overview of the Find Pick View object for enabling Find and Associate functionality.
“Configuring Searchable Find Categories” on page 99	This topic covers the activation of Find objects to display as searchable Find categories in the Search Center Look In list.
“Configuring the Find Results View” on page 99	This topic covers configuring the view in which Find results are displayed.
“Configuring Find and Associate Records” on page 100	This topic covers enabling Find and Associate functionality in Oracle's Siebel Tools.
“Creating Preview Views for Find” on page 101	This topic covers configuring preview views in Siebel Tools.
“Configuring Siebel Communications Server and Find Integration” on page 102	This topic covers defining Find parameters for CTI (Computer Telephony Integration).
“Performing a Find Operation” on page 111	This topic covers the end-user Find operation.
“Associating Results with the Active Record” on page 112	This topic covers the end-user Find and Associate operation.

What's New in Siebel Search Administration Guide, Version 8.0, Rev. C

Table 5 lists the changes described in this version of the documentation to support Release 8.0.0.3 of the software.

Table 5. Changes in Siebel Search Administration Guide, Version 8.0, Rev. C

Topic	Description
"Administering Siebel Server Component Groups" on page 34	The SearchIncrementalIndexProcessor server component has been removed.
"Configuring Siebel Search Engine Settings" on page 36	The <i>XML Indexable Data Location</i> parameter has been added. This is the Siebel Search Center shared FTP location for storing data for the RSS crawler to access and index.
"Configuring the Default Search Definition" on page 54	This topic has been updated to include a list of Search Definition and Siebel application mappings.

What's New in Siebel Search Administration Guide, Version 8.0, Rev. B

Table 6 lists the changes described in this version of the documentation to support Release 8.0.0.2 of the software.

Table 6. Changes in Siebel Search Administration Guide, Version 8.0, Rev. B

Topic	Description
"Features Supported for Find, Search, and Mobile Search" on page 20	This topic describes the features supported for Find and Search.
"Configuring the RSS Crawler for FTP Indexing" on page 30	The RSS Crawler Grant field has been added.
"Configuring the Default Search Definition" on page 54	This topic covers setting up the default Search Definition, and the Categories displayed in the Search Index Settings view.
Chapter 8, "Configuring Siebel Find"	This chapter describes how to administer Siebel Search Find objects.
Chapter 9, "Using Siebel Search"	This chapter describes Siebel Search end user functionality.

What's New in Siebel Search Administration Guide, Version 8.0, Rev. A

Table 7 lists the changes described in this version of the documentation to support integration with Oracle Secure Enterprise Search.

Table 7. Changes in Siebel Search Administration Guide, Version 8.0, Rev. A

Topic	Description
Chapter 3, "Setting Up Siebel Search with Oracle Secure Enterprise Search"	This chapter covers deployment of Siebel Search with Oracle Secure Enterprise Search.
"Configuring Siebel Search Engine Settings" on page 36	This topic covers the adapter library and search engine parameters for integration with Oracle Secure Enterprise Search.
"Configuring the Siebel Business Component Connector" on page 42	This topic covers administration of the business component connector for integration with Oracle Secure Enterprise Search.
"Defining Index Elements" on page 69	This topic covers the Oracle Secure Enterprise Search index fields that are available for mapping to Business Component fields.
"Creating Search Run-Time Events for Custom Search Objects" on page 76	This topic covers the mapping of user-defined search objects.

What's New in Siebel Search Administration Guide, Release 8.0

Table 8 lists the changes described in this version of the documentation to support Release 8.0 of the software.

Table 8. Changes in Siebel Search Administration Guide, Release 8.0

Topic	Description
"Overview of Siebel Search" on page 19	This chapter includes an architecture and functionality overview.
"Configuring Siebel Search Engine Settings" on page 36	This topic covers administration of search engine parameters.
"Configuring the Siebel Business Component Connector" on page 42	This topic covers administration of the business component Connector.
Chapter 5, "Configuring Index Mappings"	This chapter covers adding user-defined search objects, such as Business Components or Connectors.
Chapter 6, "Administering Siebel Search Index Settings"	This chapter covers administering search index settings. Support has been added for incremental and refresh indexing.

Table 8. Changes in Siebel Search Administration Guide, Release 8.0

Topic	Description
Appendix A, "Preconfigured Search Objects"	This appendix lists the preconfigured Search objects that are provided for each Siebel application.
Appendix B, "Syntax for Filter Search Specifications"	This appendix covers the syntax for filtering the index record-set to incorporate custom business rules.

2

Overview of Siebel Search

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

- [“About Siebel Search” on page 19](#)
- [“Features Supported for Find, Search, and Mobile Search” on page 20](#)
- [“Siebel Search Architecture Overview” on page 22](#)
- [“Siebel Search Web Service” on page 22](#)

About Siebel Search

Oracle’s Siebel Search provides incremental indexing of search fields, basic and advanced search functionality for both structured and unstructured data, Mobile Search for disconnected deployments, and Find operations for real-time database queries. Siebel Search is integrated with Oracle Secure Enterprise Search.

About Siebel Search Operations

Indexed Search requires licensing of a search engine, such as Oracle Secure Enterprise Search. Full text searches can be performed across multiple business components, fields and files with one operation. A Search operation allows a broad search by not requiring the user to specify specific fields to search upon. Search also gives you the option of searching through attachments. Search operations are case insensitive.

About Siebel Find Operations

Find is a tool that consists of a direct query on a database, and allows users to query on a field-by-field basis. Find objects are accessible from anywhere in your Siebel application through the Search Center, and allow users to perform queries on specific predefined fields linked to specific business components (such as querying for an employee’s last name). Find results are a real-time reflection of database records because Find directly queries the database instead of using indices. 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 E-Delivery.

Features Supported for Find, Search, and Mobile Search

Table 9 summarizes the features available for Siebel Find, Search, and Mobile Search.

Table 9. Supported Features for Find, Search, and Mobile Search

Feature	Find	Search	Mobile Search
Password Encryption	Not applicable.	<ul style="list-style-type: none"> ■ Supported for HTTPS indexing. ■ Not supported for FTP indexing. 	No.
Secure indexing	Not applicable.	<ul style="list-style-type: none"> ■ HTTPS indexing: Highly secure. ■ FTP indexing: Less secure than indexing over HTTPS. 	No.
Database queries	Yes.	No. Searches are run against search indices.	No. Searches are run against search indices.
Full text search	Not applicable.	Yes.	Yes.
Refresh indexing	Not applicable.	Yes.	Yes.
Incremental indexing	Not applicable.	Yes.	Manual incremental indexing supported.
Monitoring batch processing	Not applicable.	<ul style="list-style-type: none"> ■ Supported for HTTP indexing. ■ Not supported for FTP indexing. 	No.
Keyword search	No.	Yes.	Yes.
Supports filter field search (also called parametric search).	Yes.	Yes.	Yes.
Wildcard search	Applies to any character, including space, that is, the search can span more than one word.	Does not apply to punctuation characters, such as a space, or comma. Applies to characters only within a word.	Does not apply to punctuation characters, such as a space, or comma. Applies to characters only within a word.
Case insensitive search	No.	Yes.	Yes.

Table 9. Supported Features for Find, Search, and Mobile Search

Feature	Find	Search	Mobile Search
Boolean operators	No.	Yes. Supports AND and OR Boolean operators.	Yes. Supports AND and OR Boolean operators.
Associate, and drill down operations	Yes.	Yes.	Yes.
Supports both customer and employee applications	Supported in employee-facing applications. Not supported in customer-facing applications.	Yes.	Supported in employee-facing applications. Not supported in customer-facing applications.
Searches on content in attachments	No.	Yes.	Yes.
Searches on external file systems	Not applicable.	Yes.	Yes.
Business Component Connector	Not applicable.	Yes.	Yes.
File System Connector	Not applicable.	Yes.	No.
Web Crawler Connector	Not applicable.	Yes.	No.

Siebel Search Architecture Overview

The Search architecture is comprised of the elements in [Figure 1](#).

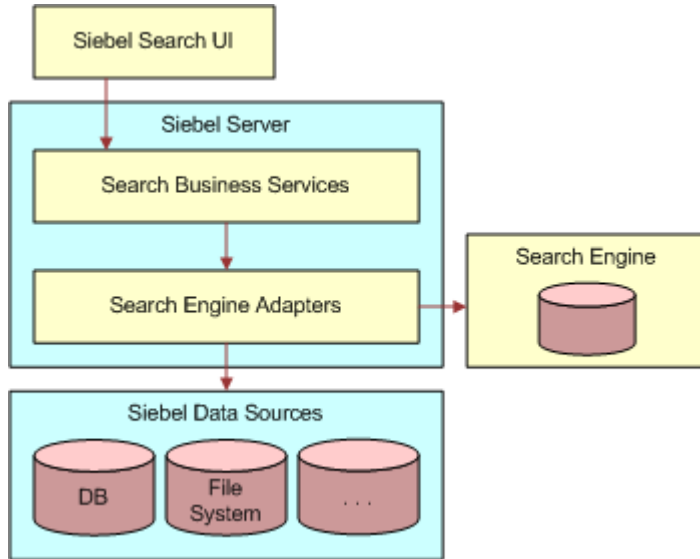


Figure 1. Siebel Search Architecture Overview

[Figure 1](#) includes the following elements:

- **Siebel Search UI.** Interface for retrieval of Find and Search results.
- **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.** Source for the indexed data, for example, Siebel business components.

Siebel Search Web Service

Siebel Search provides a set of Business Service APIs, which can be exposed as a Web service through the Siebel Web services Framework. The following Search Web service is 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.

For more information on the SearchExternalService Web service, see *Siebel CRM Web Services Reference*.

3

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 on page 24](#)
- [Installing Server Components for Siebel Search on page 24](#)
- [Oracle Secure Enterprise Search Pre-Installation Tasks on page 25](#)
- [Installing Oracle Secure Enterprise Search on page 25](#)
- [Creating the Siebel Search Center Directory Structure on the Siebel Server on page 26](#)
- [Enabling FTP or HTTP Indexing on page 27](#)
- [Configuring the FTP Server for FTP Indexing on page 28](#)
- [Configuring the RSS Crawler for FTP Indexing on page 30](#)
- [Configuring the RSS Crawler for HTTP Indexing on page 31](#)
- [Configuring Field Mapping Settings on page 33](#)
- [Administering Siebel Server Component Groups on page 34](#)
- [Administering Workflow Management Components on page 35](#)
- [Enabling Search Security Web Service on page 35](#)
- [Activating the Search Engine on page 36](#)
- [Configuring Siebel Search Engine Settings on page 36](#)
- [Process of Setting Up the Business Component Source and Connector for Oracle Secure Enterprise Search Integration on page 42](#)
- [Process of Setting Up the File System Source and Connector for Oracle Secure Enterprise Search Integration on page 47](#)
- [Process of Setting Up the Web Crawler Source and Connector for Oracle Secure Enterprise Search Integration on page 50](#)
- [Administering Connectors for Oracle Secure Enterprise Search Integration on page 53](#)
- [Configuring the Default Search Definition on page 54](#)
- [Activating Search Run-Time Events on page 54](#)
- [Creating Server Repeating Jobs for Incremental Indexing on page 55](#)
- [Creating a Server Repeating Job for HTTP Indexing on page 56](#)
- [Configuring the Eapps.cfg File for HTTP Indexing on page 57](#)
- [Configuring Secure Sockets Layer Authentication for HTTP Indexing on page 58](#)

- [Importing the SSL Certificate for HTTP Indexing on page 58](#)
- [Configuring Single Sign-On Authentication for HTTP Indexing on page 58](#)
- [Configuring User Authentication for Search Queries on page 59](#)
- [Disconnecting from Oracle Secure Enterprise Search on page 59](#)

About Installing Siebel Search

Siebel Search uses Oracle Secure Enterprise Search as the default search engine. This chapter covers installation of Oracle Secure Enterprise Search, and installation of Siebel components related to Search. Before beginning the Siebel installation process, see *Siebel System Requirements and Supported Platforms* on Oracle Technology Network. Before beginning the Oracle Secure Enterprise Search installation process, see *Oracle Secure Enterprise Search Release Notes* for a list of supported platforms, and *Oracle Secure Enterprise Search Installation and Upgrade Guide* for a list of system requirements. The Oracle Secure Enterprise Search documentation is available on Oracle Technology Network.

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>_OSSES_Field-Mappings.xml file. For more information, see [Chapter 5, "Configuring Index Mappings."](#)

Installing Server Components for Siebel Search

Siebel Search requires the installation of the Siebel Enterprise Server, including the Siebel Server and the Gateway Name Server, and Oracle Secure Enterprise Search. Oracle Secure Enterprise Search and the Siebel Enterprise Server must be deployed on separate, dedicated servers. For information on system requirements and supported platforms, see *Siebel System Requirements and Supported Platforms* on Oracle Technology Network, and the Oracle Secure Enterprise Search documentation. 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, Siebel servers, and FTP servers.

For information on installing server components, see the *Siebel Installation Guide* for the operating system you are using.

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: \oracl e\ses\ <ses on="" versi="">\OH.</ses>
Data Storage Location	Set the value to D: \oracl e\ses\ <ses on="" versi="">\oradata.</ses>

- 2 Create the Siebel Search Center Config directory under the Siebel File System on the Oracle Secure Enterprise Search Server:
 - a On Windows create the Config directory at D: \fs\SSC\Config\.
 - b 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:
 - a On Windows copy the crawler file from `si ebsrvr\bin\` on the Siebel Server to `D: \fs\SSC\Config\` on the Oracle Secure Enterprise Search Server.
 - b On UNIX copy the crawler file from `si ebsrvr/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” on page 26](#)
- [“Creating the Siebel Search Center Directory on UNIX” on page 27](#)

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\xml\data`.

The XML feed files are generated at runtime and temporarily stored in the `fs\SSC\xml\data` 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\xml\data\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>_OSES_Field-Mappings.xml` from the installation directory at `sibsrvr\bin\` to the config directory at `D:\fs\SSC\Config\`.
 - a 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.
 - b 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/xml i data.

The XML feed files are generated at runtime and temporarily stored in the fs/SSC/xml i data 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/xml i data/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/Confi g.

- 4 Copy the file <application_suite>_OSES_Field-Mappings.xml from the installation directory at siebsrvr/lib/ to the confi g di rectory at /export/home/fs/SSC/Confi g/.

a 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.

b 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 confi g di rectory at /export/home/fs/SSC/Confi g/.

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.

Enabling FTP or HTTP Indexing

Siebel Search provides both FTP and HTTP options for indexing. Indexing over HTTPS is more secure than indexing over FTP. Each indexing method uses a different type of feed. The feed is defined as the collection of documents in the data repository for the index operation. FTP and HTTP indexing use the following feed types:

- **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.
- **HTTP indexing using control feed.** Individual feeds are generated dynamically, and can be located anywhere. A single control file is generated with links to the feeds. This control file is the input to the connector. The control feed location is configured in the file `RSS_Crawler_Configuration.xml`.

The Send Index Feed Via HTTP setting is used to switch between FTP and HTTP indexing.

To enable FTP or HTTP indexing

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

The default value is False.

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” on page 28](#)
- [“Configuring the Search FTP Server on UNIX” on page 29](#)

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 check box 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 check boxes for 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 Enterprise Search. Siebel Search uses the directory feed type for indexing over FTP.

To configure the RSS Crawler on the 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:
 - a On Windows this file is located at `D:\fs\SSC\Config\`.
 - b On UNIX this file is located at `/export/home/fs/SSC/Config/`.
- 2 Complete the mandatory fields in the Siebel Customer configuration section. The fields are described in the following table.

Field	Description	Mandatory
feedLocation	<p>The <code>xmlidata</code> (XML-based indexable data) directory location on the FTP Server, where the XML-based feed files are stored for indexing. This value is specified relative to your FTP Home Directory, for example, if your FTP Home Directory is set to <code>D:\fs\SSC</code> and the <code>xmlidata</code> folder is at <code>D:\fs\SSC\xmlidata</code>, then set the <code><feedLocation></code> value to <code>ftp://<Siebel_Server_IP_Address>/xmlidata</code>.</p> <p>On Windows this value is specified in the format: <code>ftp://<Siebel_Server_IP_Address>/xmlidata</code></p> <p>On UNIX this value is specified in the format: <code>ftp://<Siebel_Server_IP_Address>/xmlidata</code></p> <p>NOTE: FTP must be included in the <code>feedLocation</code> value.</p>	Yes
feedType	Type of feed file. Set the value to <code>directoryFeed</code> .	Yes
errorFileLocation	<p>Location on the FTP Server where the <code><FileName>.err</code> and <code><FileName>.suc</code> files will be stored. This value is specified relative to your FTP Home Directory</p> <p>On Windows and UNIX the value is specified in the format: <code>/xmlidata/err</code></p> <p>NOTE: FTP is not included in the <code>errorFileLocation</code> value.</p>	No

Field	Description	Mandatory
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.	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

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"/>
```

Configuring the RSS Crawler for HTTP 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 Enterprise Search. Siebel Search uses the control feed type for indexing over HTTP.

To configure the RSS Crawler on the 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:
 - a On Windows this file is located at `D:\fs\SSC\Config\`.
 - b On UNIX this file is located at `/export/home/fs/SSC/Config/`.
- 2 Complete the mandatory fields in the Siebel Customer configuration section. The fields are described in the following table.

Field	Description	Mandatory
feedLocation	Location on the HTTP server where the control file is generated with links to the feeds. On Windows and UNIX the value is specified in the format: <code>http://<Siebel_Server>/eai_<language>/start.swe?OSESRequest=true&SWEExtSource=SearchDataProcessor&SWEExtCmd=Execute&FeedType=controlFeed</code>	Yes
feedType	Type of feed file. Set the value to <code>controlFeed</code> .	Yes
errorFileLocation	Location on the HTTP server where the <code><FileName>.err</code> and <code><FileName>.suc</code> files will be stored. On Windows and UNIX the value is specified in the format: <code>http://<Siebel_Server>/eai_<language>/start.swe?OSESRequest=true&FeedType=statusFeed</code>	No
securityType	Type of security to be enabled. Set the value to <code>attributeBased</code> .	Yes
sourceName	Name of the Siebel data source. Set the value to <code>buscomp</code> .	Yes
securityAttribute	Attribute in the feed files that provides the security information. Set the value to <code>sblvisibilityid</code> .	Yes
Grant	This attribute governs the Siebel user's access to a set of result records. Set the value to <code>True</code> . 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

Example of Configuring the RSS Crawler for HTTP Indexing

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

The following extract provides sample `RSS_Crawler_Configuration.xml` content:

```
<rsscrawler xmlns="http://xmlns.oracle.com/search/rsscrawlerconfig">
  <feedLocation>http://<Siebel_Server>/eai_<language>/
start.swe?OSESRequest=true& SWExtSource=SearchDataProcessor& SWExtCmd=Execute& FeedType=controlFeed</feedLocation>
  <feedType>controlFeed</feedType>
  <errorFileLocation>http://<Siebel_Server>/eai_<language>/
start.swe?OSESRequest=true& FeedType=statusFeed</errorFileLocation>
  <securityType>attributeBased</securityType>
  <sourceName>buscomp</sourceName>
  <securityAttribute name="sblvisibility" grant="true"/>
</rsscrawler>
```

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.
 - a On Windows this file is located at `D:\fs\SSC\Config\`.
 - b 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
%webservice%	Set the value to <IP_Address>: <Port_Number> of the Siebel application server. Port number is optional for Windows.
%objmgr%	This is the application object manager. Set the value to the application that is running, for example, CallCenter or Fins.
%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 EAI Object Manager and Search Data Processor server component groups. These two component groups must be enabled for all indexing operations. The SearchDataProcessor component processes Search data and builds the index. Once the Search server is set up and the indices have been defined, the components must be synchronized. For more information on Siebel Server component groups, see *Siebel System Administration Guide*.

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

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 EAI Component Group.
- 5 On the Component Groups applet, click the Enable button.
- 6 Re-start 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 EAI 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 Re-start 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 Re-start 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.

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:

```
http://<WebServer>/eai_<language>/
start.swe?SWEExtSource=WebService&SWEExtCmd=Execute&UserName=<UserName>&Password=<
Password>
```

- a Substitute the *WebServer* variable with the *IP_Address: Port_Number* of the Siebel application server. Port number is optional for Windows.
- b Substitute the *language* variable with the Siebel application language, for example, *enu*.
- c Substitute the *UserName* and *Password* variables with the Siebel administrative user's credentials.

The configured value displays as *http://<WebServer>/eai_enu/
start.swe?SWEExtSource=WebService&SWEExtCmd=Execute&UserName=SADMIN&Password=MS
SQL*

- 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.
- 7 Restart the Siebel Server.

Activating the Search Engine

A search engine is activated by selecting the Default Flag check box in the Search Engine Settings view. Only one search engine can be activated at any one time—make sure that the Default Flg check box is checked for just one search engine.

To activate the search engine

- 1 Navigate to Administration – Search screen, and then the Search Engine Settings view.
- 2 Check the Default Flag field for Oracle Secure Enterprise Search.

Configuring Siebel Search Engine Settings

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. Settings that are listed as specific to FTP indexing do not need to be configured for HTTP indexing. Settings that are listed as specific to HTTP indexing do not need to be configured for FTP indexing.

To configure Siebel Search engine settings for Oracle Secure Enterprise Search integration

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

2 Complete the search engine settings. The settings are described in the following table.

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. Set the value to <code>http://search.oracle.com/AdminService/2006-09-15</code> .
Admin API Webserver Address	The web server address for the Oracle Secure Enterprise Search OracleSearchAdminService Web service. Set the value to <code>http://<SES_Server>:<Port>/search/ws/admin/SearchAdmin</code> .
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 one of the following: <ul style="list-style-type: none"> ■ If you are using FTP indexing, set the value to less than or equal to 4500. ■ If you are using HTTP indexing, set the value to less than or equal to 10000.
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 one of the following: <ul style="list-style-type: none"> ■ If you are using FTP indexing, set the value to less than or equal to 1500. ■ If you are using HTTP indexing, set the value to less than or equal to 1000.
Dupmarked	This setting is not supported.
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.

Setting	Description
Feed Access Password	<p>This is the password for accessing the RSS feeds that Oracle Secure Enterprise Search will crawl.</p> <ul style="list-style-type: none"> ■ If you are using FTP indexing, set the value to the password used to log in to the FTP server where the XML feed files are generated. ■ If you are using HTTP indexing, set the value to the password used to access the Siebel EAI component. <p>Feed Access User ID is set in the Search Connector Settings view.</p>
Feed URL Prefix	<p>This setting is specific to HTTP indexing. The value is set to the HTTP URL used for HTTP indexing. Set the value to <code>http://<Siebel_Server>:<HTTP_Port>/eai_<language>/start.swe?OSESRequest=true&</code></p>
Filename	<p>The path to the <code><application_suite>_OSES_Field-Mappings.xml</code> file on the Siebel Server.</p> <ul style="list-style-type: none"> ■ Use the file <code>SSC_OSES_Field-Mappings.xml</code> if you are using a Siebel application that operates across industries, such as Siebel Call Center, Siebel Sales or Siebel Marketing. ■ Use the file <code>SIA_OSES_Field-Mappings.xml</code> if you are using a Siebel industry application, such as Siebel Finance, Siebel Medical, or Siebel Pharma. <p>This file is located on the Siebel Server in the <code>\fs\SSC\Config</code> directory.</p>
Login URL	<p>The administration URL for Oracle Secure Enterprise Search. The URL format is <code>http://<SES_Server>:<HTTP_Port>/search/admin/control/login.jsp</code>.</p>
Namespace	<p>The name of the Oracle Secure Enterprise Search Web service. Set the value to <code>OracleSearchService</code>.</p>
Password	<p>This is the Oracle Secure Enterprise Search Administration User Password. The examples in this guide use <i>si ebel 1</i>. For more information, see "Installing Oracle Secure Enterprise Search" on page 25.</p>
Recordcount	<p>This setting configures the inclusion of an estimate in the result for the number of records in the result set. Set the value to <code>True</code>.</p>

Setting	Description
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.
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
Send Index Feed Via HTTP	This setting is used to turn HTTP indexing on or off: <ul style="list-style-type: none"> ■ Set the value to True to turn on HTTP indexing. ■ Set the value to False to turn on FTP indexing. The default value is False.
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. The examples in this guide use Welcome as the Oracle Secure Enterprise Search Password/Entity Password. For more information, see “Verifying Oracle Secure Enterprise Search Federated Trusted Entities and Siebel Identity Plugin Manager” on page 44.
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” on page 44.

Setting	Description
Shared Search UNC Location	<p>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.</p> <ul style="list-style-type: none"> ■ The address format on Windows is: \\<IP address>\fs\SSC ■ The address format on UNIX is: /export/home/qa/fs/SSC <p>NOTE: Adding a slash (/) or backslash (\) after SSC will create an error.</p>
SSC FTP Location	<p>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 should be set to ftp://<Siebel_Server_IP_Address>/.</p>
Use Session Mode	<p>This setting is specific to HTTP indexing:</p> <ul style="list-style-type: none"> ■ Set the value to True to use a single HTTP session for retrieving all batches of data required for the index operation. NOTE: Make sure that cookies are enabled in the Web browser. ■ Set the value to False to use a separate HTTP session for retrieving each batch of data required for the index operation. The HTTP request will log in again every time the schedule service is invoked during the index operation. NOTE: Setting the value to False might impact indexing performance.
Username	<p>This is the Oracle Secure Enterprise Search Administration User ID. The default value is eqsys.</p>

Setting	Description
Web Service Endpoint Address	<p>This is the Siebel authentication and validation Web service endpoint. Set the value to <code>http://<WebServer>/eai_<language>/start.swe?SWEExtSource=WebService&SWEExtCmd=Execute</code>.</p> <p>This value can be copied from where it was configured in the Inbound Web Services view of the Siebel administration UI, removing the username and password from the URL. For more information, see “Enabling Search Security Web Service” on page 35.</p>
Web Service Endpoint Password	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.
Web Service Endpoint Username	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.
WebServer Address	URL for the Oracle Search Service. The address format is <code>http://<SES_Server>:<HTTP_Port>/search/query/OracleSearch</code> .
XML Indexable Data Location	<p>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.</p> <ul style="list-style-type: none"> ■ The path format on Windows is: <code>\\<IP address>\fs\SSC\xml i data\</code> ■ The path format on UNIX is: <code>/home/export/fs/SSC/xml i data/</code>

3 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.

Process of Setting Up the Business Component Source and Connector for Oracle Secure Enterprise Search Integration

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” on page 42](#)
- [“Activating the Siebel Identity Plugin Manager for Oracle Secure Enterprise Search” on page 43](#)
- [“Verifying Oracle Secure Enterprise Search Federated Trusted Entities and Siebel Identity Plugin Manager” on page 44](#)
- [“Deploying the Business Component Source” on page 45](#)
- [“Verifying the Oracle Secure Enterprise Search Source for the Business Component Connector” on page 45](#)

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 for Oracle Secure Enterprise Search Integration” on page 42](#).

To configure the Siebel business component connector settings

- 1 Navigate to Administration – Search screen, and then the Search Connector Settings view.
The Search Connector Settings List applet is displayed.
- 2 Complete the business component connector fields. Some fields are described in the following table. 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.

Field	Value
Configuration URL	<p>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.</p> <ul style="list-style-type: none"> ■ On Windows set the value to <i>file://localhost/fs/SSC/config/RSS_Crawler_Configuration.xml</i> ■ On UNIX set the value to <i>file://localhost/export/home/fs/SSC/config/RSS_Crawler_Configuration.xml</i>
Feed Access User ID	<p>This is the User ID for accessing the RSS feeds that Oracle Secure Enterprise Search will crawl. Set the value to the User ID used to log in to 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>.</p> <p>Feed Access Password is set in the Search Engine Settings view.</p>
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	<p>This field is preconfigured and takes the value oracle.search.plugin.security.auth.siebel.SiebelAuthManager.</p> <p>Do not change the preconfigured value.</p>
jarFile	<p>This field is preconfigured and takes the value /oracl eappl i cati ons/Si ebel 8Crawl er. j ar.</p> <p>Do not change the preconfigured value.</p>

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 for Oracle Secure Enterprise Search Integration”](#) on page 42.

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

- 1 Navigate to the Administration – Search screen, and 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 for Oracle Secure Enterprise Search Integration](#)” on page 42.

To verify Federated Trusted Entities and the Siebel Plugin Manager

- 1 Start the Oracle Secure Enterprise Search Administration application.
- 2 Navigate to the Global Settings screen, and 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 sb1 sesuser. 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 Siebel Search Engine Settings ” on page 36.
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, and 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 <code>http://<WebServer>/eai_<language>/start.swe?SWEEExtSource=WebService&SWEEExtCmd=Execute</code> . For more information, see “Enabling Search Security Web Service” on page 35 .
Siebel 8 validation web service endpoint	This is the Siebel user validation Web service endpoint. Verify that the value is set to <code>http://<WebServer>/eai_<language>/start.swe?SWEEExtSource=WebService&SWEEExtCmd=Execute</code> . For more information, see “Enabling Search Security Web Service” on page 35 .
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 for Oracle Secure Enterprise Search Integration” on page 42](#).

To deploy the business component Source

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

The Search Connector Settings List applet is displayed.

- 2 Select the Bus. Comp Connector and click Deploy.

Verify that the deployment status of the business component Connector changes in the Search Connector Settings view.

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 for Oracle Secure Enterprise Search Integration”](#) on page 42.

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, and is case sensitive. NOTE: Make sure both values are in lower case.
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. <ul style="list-style-type: none"> ■ On Windows the value is set to file://localhost/fs/SSC/config/RSS_Crawler_Configuration.xml. ■ On UNIX the value is set to 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” on page 42.
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” on page 42.
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://<server>: <port_number>/ eai_<language>/ start.swe?SWEExtSource=SecureWebService&SWEExtCmd=Execute.
User ID	This is the Siebel administrative User ID.
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 may have specified an incorrect path to the file RSS_Crawler_Configuration.xml.

Process of Setting Up the File System Source and Connector for Oracle Secure Enterprise Search Integration

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” on page 48
- “Deploying the File System Source” on page 49
- “Verifying the Oracle Secure Enterprise Search Source for the File System Connector” on page 49

- “Verifying Indexing for the File System Connector” on page 50

Configuring the Siebel File System Connector

The file system connector needs to 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 for Oracle Secure Enterprise Search Integration” on page 47.

To configure the Siebel file system connector

- 1 Navigate to Administration – Search screen, and 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	<p>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.</p> <p>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.</p> <p>On Windows set the value to <i>file://local host//<Siebel Server IP Address>/fs/</i>.</p> <p>On UNIX set the value to <i>file://local host//<directory_1>/<directory_2></i></p>

- 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 for Oracle Secure Enterprise Search Integration”](#) on page 47.

To deploy the file system Source

- 1 Navigate to Administration – Search screen, and 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 for Oracle Secure Enterprise Search Integration”](#) on page 47.

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:///local host///<Siebel ServerIPAddress>/fsl`.
- 5 Start the Oracle Secure Enterprise Search application, and verify that Filesystem appears as a searchable source on the Search home page.

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 for Oracle Secure Enterprise Search Integration”](#) on page 47.

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 for Oracle Secure Enterprise Search Integration

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”](#) on page 50
- [“Creating a Source Group for the Web Crawler Connector”](#) on page 51
- [“Verifying Oracle Secure Enterprise Search Indexing of the Web Crawler Source”](#) on page 52
- [“Administering the Siebel Web Crawler Connector”](#) on page 52

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 for Oracle Secure Enterprise Search Integration”](#) on page 50.

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 drop-down menu.
- 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. All letters must be in lower case.
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 for Oracle Secure Enterprise Search Integration”](#) on page 50.

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, and then the Source Groups view.
- 3 Click Create.
- 4 Enter crawler as the name of the Source Group. All letters must be in lower case.
- 5 Click Proceed to Step 2.
- 6 Select Web from the Select Source Type drop-down menu.
- 7 Click Go.
- 8 Select crawler from the Available Sources list, and click the right 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 for Oracle Secure Enterprise Search Integration”](#) on page 50.

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

- 1 Navigate to 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 [“Process of Setting Up the Web Crawler Source and Connector for Oracle Secure Enterprise Search Integration”](#) on page 50.

To configure the Siebel Search web crawler connector

- 1 Navigate to Administration – Search screen, and 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	OSSES

- 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” on page 53](#)
- [“Deleting a Connector” on page 54](#)

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” on page 53](#).

To update connector settings

- 1 Navigate to Administration – Search 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.

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 needs to be deleted and recreated.

This task is a step in [“Administering Connectors for Oracle Secure Enterprise Search Integration” on page 53](#).

To delete a connector

- 1 Navigate to Administration – Search screen, and then the Search Connector Settings view.
The Search Connector Settings List applet is displayed.
- 2 Select the Connector and click Delete.

Configuring the Default Search Definition

This topic covers configuring the default search definition in the Search Definition view of the Siebel Search Administration screen. 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 needs to 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” on page 114](#).

To configure the default search definition

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

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 Administration - Runtime Events screen, and then the Action Sets view.

- 2 Query on the Update Index Action Set.
- 3 Select the Active and Enable Export check boxes to activate the Update Index run-time events.

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 Administration - Server Configuration screen, and 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

- 7 Navigate to Administration - Server Management screen, and then the Jobs view.
- 8 Add a new repetitive job with the values described in the following table.

Field	Description
Component/Job	Set this to Search Incremental Indexer.
Scheduled Start	The scheduled start date and time of the component job.
Expiration	The date at which the component job is no longer valid.

Field	Description
Requested Server	Set if you want to target a server component on a specific Siebel Server.
Request Key	Set if you want to target a component or repeating component job to a specific instance of the server component identified by the request key. In all other situations, keep this field blank.
Delete Interval	Set with Delete Unit field, this field determines the length of time before the component job is deleted. If not updated, this field defaults to 1.
Delete Unit	Set with Delete Interval field, this field determines the length of time before the component job is deleted. If not updated, this field defaults to Weeks.
Repeating	This option must be selected.
Repeat Units	Set the value to Seconds.
Repeat Interval	Set the value to 600.
Retry on Error	This option must be selected. This option will retry the component job in case of error.
Sleep Time	This field determines the amount of time before the component job is retried. The value is specified in seconds. Set the value to 60.
Number of Retries	This field determines the number of times the component job is retried. Set the value to 1.

- 9 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

- 10 Click Start to start the new job.

Creating a Server Repeating Job for HTTP Indexing

This topic describes how to create the Search Schedule Monitor repeating job for HTTP indexing. Search Schedule Monitor starts the Oracle Secure Enterprise Search Scheduler. 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 HTTP indexing

- 1 Navigate to the Administration - Server Configuration screen, and then the Job Templates view.
- 2 In the Jobs Templates list, click New.
- 3 Set the Name to Search Schedule Monitor.
- 4 Set the Short Name to SSM.
- 5 In the Component/Job field, 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	ScheduleMonitor

- 7 Navigate to Administration - Server Management screen, and then the Jobs view.
- 8 Add a new repetitive job with the values described in the following table.

Field	Description
Component/Job	Set to Search Schedule Monitor
Repeating	This option must be selected.
Repeat Units	Set the value to Minutes.
Repeat Interval	Set the value to 5.
Retry on Error	This option must be selected. This option will retry the component job in the event of an error.
Sleep Time	This field determines the amount of time before the component job is retried. The value is specified in seconds. Set the value to 60.
Number of Retries	This field determines the number of times the component job is retried. Set the value to 1.

- 9 Click Submit Job.

Configuring the Eapps.cfg File for HTTP Indexing

The eapps.cfg file contains parameters that control interactions between the Siebel Web Engine and the Siebel Web Server Extension (SWSE), for all Siebel Business Applications deploying the Siebel Web Client. If you want to use session mode for HTTP indexing, you need to configure the SessionTracking parameter in the eapps.cfg file. For more information on eapps.cfg, see *Siebel Security Guide*.

To configure the eapps.cfg File for HTTP indexing

- 1 Navigate to the SWEAPP_ROOT\bin directory.
SWEAPP_ROOT is the directory in which you installed the SWSE.
- 2 Open the file eapps.cfg
- 3 Set SessionTracking to Cookie.

Configuring Secure Sockets Layer Authentication for HTTP Indexing

For information on configuring Secure Sockets Layer (SSL) authentication for HTTP indexing, see *Siebel Security Guide*.

Importing the SSL Certificate for HTTP Indexing

Oracle Secure Enterprise Search uses the default keystore in J2SE: \$ORACLE_HOME/jdk/jre/lib/security/cacerts. The Siebel SSL certificate must be imported into this keystore to use SSL for HTTP indexing.

NOTE: Back up the keystore file before modifying it.

To import the SSL certificate for HTTP indexing

- 1 Copy the Siebel SSL certificate from the Siebel Server to the Oracle Secure Enterprise Search server at <SES_HOME>/ses1/jdk/jre/lib/security/.

```
SES_HOME/ses1/jdk/jre/bin/keytool -import -trustcacerts -alias ohs -file ../lib/security/certificate.cer -keystore ../lib/security/cacerts -storepass changeit
```
- 2 Execute the following command:
- 3 Select Yes when asked for confirmation to import the certificate into your specified keystore.

Configuring Single Sign-On Authentication for HTTP Indexing

For information on configuring Single Sign-On (SSO) authentication for HTTP indexing, see *Siebel Security Guide*.

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, and 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.

Disconnecting from Oracle Secure Enterprise Search

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

To disconnect from Oracle Secure Enterprise Search

- 1 Navigate to the Administration – Search screen, and 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.

4

Setting Up Disconnected Mobile Search

This chapter covers setting up Siebel Mobile Search. All tasks in this chapter are required for Mobile Search setup. This chapter includes the following topics:

- [“About Installing Mobile Search” on page 61](#)
- [“Creating the Siebel Search Center Directory Structure on the Mobile Client” on page 62](#)
- [“Installing Mobile Search” on page 62](#)
- [“Start the DSM Listener” on page 63](#)
- [“Configuring Field Mapping Settings” on page 63](#)
- [“Adding the Mobile Search Administration Screen” on page 64](#)
- [“Administering the Business Component Connector for Mobile Search” on page 65](#)
- [“Activating the Search Engine” on page 65](#)
- [“Configuring Siebel Mobile Search Engine Settings” on page 66](#)
- [“Process of Setting Up the Index Definition for the Search Mobile Client” on page 67](#)
- [“Activating Search Run-Time Events for Mobile Search” on page 68](#)
- [“Synchronizing Siebel Mobile Search” on page 68](#)

About Installing Mobile Search

This chapter covers installation of Mobile Search, and installation of Siebel components related to Mobile Search. Before beginning the Siebel installation process, see *Siebel System Requirements and Supported Platforms* on Oracle Technology Network. The Siebel Mobile Client must be installed before installing Siebel Mobile Search. See *Siebel Remote and Replication Manager Administration Guide* for information on the Siebel Mobile Web Client and Siebel Remote.

NOTE: Siebel Mobile Search 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 [Chapter 5, “Configuring Index Mappings.”](#)

Creating the Siebel Search Center Directory Structure on the Mobile Client

This topic covers creation of the directories that are required for Siebel Mobile Search.

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

- 1 Create the Siebel Search Center Config directory *D: \fs\SSC\Config* under the Siebel File System on the Siebel Mobile client.
- 2 Create a directory for storing the XML feed files on the Siebel Server, for example, *D: \fs\SSC\xml\data*.

The XML feed files are generated at runtime and temporarily stored in the *\xml\data* 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 Mobile Search

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

To install the Siebel Mobile Search Client

- 1 Install Siebel Mobile Client.

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 Medical, 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 <i>C:\Documents and Settings\<UserName>\My Documents\Disconnected Search</i> .
Feed Location	Location where the XML-based indexable data files will be generated. Set the value to <i><install_dir>\fs\SSC\xml\data</i> .
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 <i>DSM Username</i> setting in the Search Engine Settings view.
Password	Create a password for DSM. This value is also required when setting the <i>DSM Password</i> setting in the Search Engine Settings view.

- 7 Click Install.

A Set Service Login dialog displays to confirm User Name and Password.

- 8 Enter the Username and Password set on the previous screen, and click OK.

Start the DSM Listener

This topic covers enabling Siebel Mobile Search 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.
- 4 Click *Start Listener*.

Configuring Field Mapping Settings

The settings enclosed in percentage tags in the field mapping file must be configured to enable Siebel Mobile Search.

To configure field mapping settings

- 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
%webservice%	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, <i>CallCenter</i> or <i>Fins</i> .
%lang%	Set the value to the language which the Siebel application is configured for, for example, the value for English is <i>enu</i> .
%hostName%	Set the value to the IP address of the Mobile Client host computer.

Adding the Mobile Search Administration Screen

The Mobile Search Administration screen needs to 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

- 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.

Property	Description
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 <i>Configuring Siebel Business Applications</i> for defining Sequence for Screen View Objects.
Text - String Reference	Set the value to <i>SBL_ADMINISTRATION_-_MOBILE_SEARCH</i>

- 8 Compile the changes.

Administering the Business Component Connector for Mobile Search

The Siebel Mobile Business Component Connector is preconfigured. This task covers verifying the Mobile Business Component Connector settings.

To verify the Search Connector settings for Mobile Search

- 1 Navigate to Administration – Mobile Search screen, and 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	Set the value to <i>Mobile Business Component</i> .
Library Name	Set the value to <i>buscomp</i> .
Engine Name	Set the value to <i>DSM</i> .

Activating the Search Engine

A search engine is activated by selecting the Default Flag check box in the Search Engine Settings view. Only one search engine can be activated at any one time—make sure that the *Default Flag* check box is checked for just one search engine.

To activate the search engine

- 1 Navigate to Administration – Mobile Search screen, and then the Search Engine Settings view.
- 2 Check the *Default Flag* field for *DSM* Search Engine.

Configuring Siebel Mobile Search Engine Settings

This topic covers configuration of the Search Engine Settings view of the Siebel Mobile Search Administration UI.

To configure Siebel search engine settings for Mobile Search

- 1 Navigate to the Administration – Mobile Search screen, and then the Search Engine Settings view.
- 2 Complete the search engine fields. The fields are described in the following table:

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 <i>1500</i> . 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 <i>http://local host: <HTTP Port>/?i ndex</i> , where HTTP Port is the port of the DSM Listener. HTTP Port is defined when installing the Mobile Search client. The default value is <i>http://local host: 8095/?i ndex</i> .
DSM Password	This is the password that was created when installing the DSM client. See "Installing Mobile Search" on page 62 .
DSM Username	This is the user name that was created when installing the DSM client. See "Installing Mobile Search" on page 62 .
Dupmarked	This setting configures the marking of duplicates in the result set. Set the value to <i>False</i> .
Dupremoved	This setting configures the removal of duplicates from the result set. Set the value to <i>True</i> .
Filename	This value configures the path of the DSM field mapping file <i>SSC_DSM_Field-Mappings.xml</i> on the Mobile client. Set the value to <i>\\local host\fs\SSC\Config\SSC_DSM_Field-Mappings.xml</i>
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 <i>True</i> .
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 Xmlldata directory. The address format is <i><mobi le_search_instal l_dir>\fs\SSC</i> .

Field	Description
WebServer Address	URL for the Search Service. The address format is <i>http://localhost:<HTTP_Port>/</i> . The default value is <i>http://localhost:8095/</i> .
XML Indexable Data Location	This is the Siebel Search Center shared location where the XML feed files are temporarily stored for the DSM Listener to access and index. The path format is: <i>\\<IP address>\fs\SSC\xml\data\</i> .

- 3 Select Save Record on the list applet.
- 4 Logoff and logon 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 Search Mobile 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 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 Mobile Client Search Definition” on page 67](#)
- [“Configuring the Mobile Client Search Definition in the Application Configuration File” on page 68](#)

Configuring the Mobile Client Search Definition

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

- 1 Navigate to Administration – Mobile Search screen, and then the Search Definition view.
- 2 Select *Mobile Client Search Definition*.
- 3 Select the *Default Flg* check box.

Configuring the Mobile Client Search Definition in 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 Mobile Search Definition in 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 Scroll 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 Mobile Search

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

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

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

Synchronizing Siebel Mobile Search

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

5

Configuring Index Mappings

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

- [“About Searchable Objects” on page 69](#)
- [“Defining Index Elements” on page 69](#)
- [“Defining Index Attributes” on page 72](#)
- [“Creating Search Run-Time Events for Custom Search Objects” on page 76](#)

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 [Appendix A, “Preconfigured Search Objects.”](#) To create additional custom search objects, or to add 7.x custom search objects, the object definition needs to 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 needs to be restarted, and the Search Administration UI needs to be populated with the new Search Categories or Available Fields. See [Chapter 6, “Administering Siebel Search Index Settings.”](#)

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.

Table 10 lists the elements and attributes for defining business component index mappings.

Table 10. Mapping Elements and Attributes

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 is defined as follows: url="http://%webserver%/objmgr%_%lang%/start.swe?SWECmd=GotoView&SWEView=#VIEWNAME#&SWERF=1&SWEHo=%hostName%&SWEBU=1&SWEApplet0=#APPLETNAME#&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, bc-name="Attachment List" The value displays in the <i>Field Name</i> column of the Available Fields list applet.	Yes
	in-name	This is the index field for the business component field, for example, in-name="listing01" See Table 11 for a list of required, recommended and optional in-name definitions.	Yes
	ui-name	This is the string that will be displayed in the user interface, for example, ui-name="Attachments" The field name is displayed on the application UI if the Searchable flag is checked in the Available Fields list applet. This field attribute is optional. A value must be provided if the field is to be added to the body field teaser of the result set. This populates the Available Fields list applet on the Siebel Search administration UI.	No

Table 10. Mapping Elements and Attributes

Element	Attributes	Description	Mandatory
	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	<p>This attribute is used for passing the business component child category information. This attribute is mandatory for one-to-many mappings and must conform with to the following format:</p> <p><i><Child Business Component Name>: <Child Fields><Child Reference Field></i>, for example, <i>Service Request Attachment: ActivityFileSrcPath, ActivityFileName, ActivityFileExt, Activity Id.</i></p> <p>In the above example the constituent parts are as follows:</p> <p>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.</p> <p>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.</p> <p>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.</p>	
	type	<p>Used to define the file type represented by the field. Valid values are as follows:</p> <ul style="list-style-type: none"> ■ type="path" ■ type="filename" ■ type="ext" ■ type="na" 	

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. Table 11 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>_OSSES_Field-Mappings.xml`. The index fields are re-usable for mapping across business component fields.

Table 11. The in-name Attribute and Attribute Values

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
	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

Table 11. The in-name Attribute and Attribute Values

Attribute Name	Attribute Value	Description	Mandatory
	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

Table 11. The in-name Attribute and Attribute Values

Attribute Name	Attribute Value	Description	Mandatory
	keywords	<p>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.</p> <p>The following provides an example keywords definition for the SR Resolution Item business component:</p> <pre><field bc-name="Description" in-name="Keywords" ui-name="Description" on-name="" nv-name="" one2many="" is-id="N" id-rank="" type="na"/></pre> <p>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.</p> <p>For information on administering cluster configuration for automated keywords, see "Administering Automated Keywords" on page 91</p> <p>For more information on search attributes, see <i>Oracle Secure Enterprise Search Administrator's Guide</i>.</p>	Recommended
	language	Used for mapping to language identifier fields.	No
	lastModifiedDate	<p>This index field is reserved and cannot be mapped to user-defined fields. This index field maps to the business component Updated field.</p> <p>The Updated field must also be populated in the Search Index Settings Available Fields applet in the Administration - Search UI.</p>	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

Table 11. The in-name Attribute and Attribute Values

Attribute Name	Attribute Value	Description	Mandatory
	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
	price	Used for mapping to price fields.	No
	sblbctype	<p>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.</p> <p>The BC Name field must also be populated in the Search Index Settings Available Fields applet in the Administration - Search UI.</p>	Yes
	sblrowid	<p>This index field is reserved and cannot be mapped to user-defined fields. This index field is used for mapping to the business component <i>ID</i> field.</p> <p>The <i>ID</i> field must also be populated in the Search Index Settings Available Fields applet in the Administration - Search UI.</p>	Yes
	sblvisibilityid	<p>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 ID, or other visibility control business component fields. 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 results are filtered based on the field's sblvisibilityid setting and the visibility setting of the group to which the user belongs.</p> <p>This mapping is mandatory for access controlled business components.</p> <p>See the Access Control chapter in the <i>Siebel Security Guide</i> for more information.</p>	Yes

Table 11. The in-name Attribute and Attribute Values

Attribute Name	Attribute Value	Description	Mandatory
	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
	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, and 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

- 6 Select Save Record.

6

Administering Siebel Search Index Settings

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

- [About Search Indexes on page 79](#)
- [Creating a New Index Definition on page 79](#)
- [Creating a Logical Collection on page 81](#)
- [Filtering the Index Record-Set on page 81](#)
- [Creating Searchable Business Component Fields on page 82](#)
- [About Indexing Search Objects on page 82](#)
- [Monitoring Batch Processing for HTTP Indexing on page 85](#)

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>_OSSES_Field-Mappings.xml. See [“Defining Index Elements” on page 69](#) 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. The Definition is created in the Search Definition view of the Siebel Search Administration UI.

To create a new index definition

- 1 Navigate to Administration – Search screen, and then 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, and 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:
 - a On Windows the file is located at:
`<install_dir>\siebsrvr\bin\<language>\<application>.cfg`
 - b On UNIX the file is located at `<install_dir>/siebsrvr/lib/<language>/<application>.cfg`
- 2 Scroll 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

- 1 Navigate to Administration – Search screen, and then the Search Index Settings and Search Indices Parent Category View.
- 2 Click New on the Search Indices Parent Category applet.
- 3 Enter the Parent Category Name.
- 4 Check the Parent Category check box.
- 5 Enter a Sequence Number.
- 6 Select Save Record on the Search Index Settings list.
- 7 Click on the New button on the Search Category List applet.
- 8 Select the Categories to be included from the list of available categories.
- 9 Select Save Record on the Search Category List.

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 [Appendix B, “Syntax for Filter Search Specifications.”](#)

To filter the index record-set

- 1 Navigate to Administration – Search screen, and then the Search Index Settings view.

- 2 Enter the SQL statement in the *Filter Search Spec* field for each category that is to be pre-filtered. The syntax must comply with that defined in [Appendix B, "Syntax for Filter Search Specifications."](#)

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>_OSSES_Field-Mappings.xml file. See ["Defining Index Elements" on page 69](#) for information on mapping custom fields for Oracle Secure Enterprise Search.

To create searchable business component fields

- 1 Navigate to Administration – Search screen, and then the Search Index Settings view.
- 2 Select the business component for which the new fields will be indexed.
- 3 Click on the New button in the Available Fields applet and complete the fields.
- 4 Select the Field Name from the list.
This field is mandatory.
- 5 Select Save Record.

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 Siebel 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.
- **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.
- **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.

This topic contains the following sub-topics:

- ["Indexing Search Objects" on page 83](#)
- ["Refreshing the Index" on page 84](#)
- ["Enabling Incremental Indexing" on page 85](#)

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 screen, and then the Search Index Settings view.
- 2 Choose 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” on page 54](#).

To enable refresh indexing for custom search objects, see [“Activating Search Run-Time Events” on page 54](#) and [“Creating Search Run-Time Events for Custom Search Objects” on page 76](#).

To refresh index search objects for Oracle Secure Enterprise Search

- 1 Navigate to Administration – Search screen, and 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” on page 54](#).

To enable incremental indexing for custom search objects, see [“Activating Search Run-Time Events” on page 54](#) and [“Creating Search Run-Time Events for Custom Search Objects” on page 76](#).

Monitoring Batch Processing for HTTP Indexing

The data feed for indexing is collated into index batches in the S_SRCH_CTGRY table. The number of records in each index batch is defined by the Batch Submit Size setting in the Search Engine Settings view. When the index batch is created and submitted to the Oracle Secure Enterprise Search crawler for indexing, the status column is updated in the S_SRCH_CTGRY table.

To monitor batch processing for HTTP indexing

- 1 Execute the following query on the S_SRCH_CTGRY table:

```
select ROW_ID, NAME, SRCH_BC_NAME, FILTER_SPEC, STATUS_MSG, VIEW_NAME, STATUS_CD
from <TABLEOWNER>.S_SRCH_CTGRY where NAME like 'Index Batch';
```

- 2 Verify the status for each index batch in the Status Code column.

7

Configuring Siebel Search

This chapter describes how to configure Siebel Search views, and execution settings. It includes the following topics:

- [“About Siebel Tools Configuration Tasks” on page 87](#)
- [“Configuring the Search Results View” on page 87](#)
- [“Configuring Pick Views for Search and Attach Records” on page 88](#)
- [“Creating Preview Views for Search” on page 89](#)
- [“Configuring Access Control for Search Operations” on page 90](#)
- [“Administering Searchable Fields” on page 90](#)
- [“Administering Field Weighting” on page 90](#)
- [“Administering Automated Keywords” on page 91](#)

This chapter assumes a 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 allows you to create and maintain a custom Siebel Repository file (.srf) to store your custom configurations.

Configuring the Search Results View

The Search results can be configured to display either in Quick Search mode in the business component view on the right hand side, or under the Search Look In in the Search Results view on the left hand side. The display options differ as follows:

- **Quick Search Mode.** Displays the search results in the business component view on the right hand side, and bypasses the intermediate search results page. In this mode the list of search results are lost when the user drills down on an individual search result. Preview and Attach features are not available in this mode.
- **Results Retention Mode.** Displays the Search results in the Search Results view on the left, under the Look-In applet. In this mode, the user can drill down on a record to get the detailed record information displayed on the right hand side, and the search results are retained under the Look In panel on the left hand side. Preview and Attach features are available in this mode.

The Search results view is configured in Siebel Tools.

NOTE: If Preview or Attach features are required, the Search results must be configured to display in the Search Results view on the left hand side.

To configure the Search results view

- 1 Log in to Siebel Tools.
- 2 Choose Tools, and then Lock Project (or Alt+L), to lock the Fast Search project.
- 3 Select Applet in the Object Explorer.
- 4 Query for Search lookin applet.
- 5 Navigate to Applet User Prop.
- 6 Configure the SamePage value as follows:
 - a Set SamePage to FALSE to display the Search results in the business component view on the right hand side in Quick Search mode.
 - b Set SamePage to TRUE, and GotoResultsView to Search lookin Results View, to display the Search results on the left under the Look-In panel.
- 7 Compile the Siebel.srf file.
- 8 Restart the Siebel Server.

Configuring Pick Views for Search and Attach Records

Users can associate Search results from the search center with the active record in the top applet 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 Search Results list as an associated record. This applies only to applets that can handle such associations.

In order to attach a record in the Search Results list applet to an active parent object in the Content Area, the relationship between the record and the applet must be many-to-many. In Siebel Tools, this relationship is implemented by creating a link between the two business components with an intersection table. If you check a business object and find out that a Search object is one of its business components, and there is a many-to-many link between them, it is permissible to attach this result row to an object.

This association happens in the business object layer, in terms of Siebel Three-Level Architecture. To support the user to go to a view directly to verify the association, there is a requirement that Pick View be added to the Search object. This Pick View defines the view that users can go to after an association occurs, as well as the candidate association. You must add new Pick Views in order to add this Search object to a business object.

Pick views have been created for all existing business components. Pick views must be created in Siebel Tools for any new or custom business component.

To create Search Pick Views for custom business components

- 1 Log in to Siebel Tools.
- 2 Lock the project that will contain the Pick View object you want to add.
- 3 In the Object Explorer choose Find, and then Find Pick View.
- 4 In the Find Pick Views window, create a new record, and enter the required property values. Some properties are described in the following table:

Properties	Description	Mandatory
Applet Name	Required	Name of the applet
View Name	Required	Name of the view containing the applet
Name	Required	Logical name of the pick view
Field Name	Optional	Name of the multivalue group field that will receive the search result

- 5 To commit your changes, click anywhere outside the modified row, or move outside the row using the up and down arrow keys.
- 6 Compile your changes to the SRF file.

Creating Preview Views for Search

In order for a user to preview a result record, you must define the view to use for the preview. You define the view by setting the Preview property of the Search Category object. The view will show up in a pop-up window when the user clicks on the Preview button. Siebel Search does not support any navigation in the pop-up Preview view. The Preview view is read-only with no navigation buttons. When you have a preview view defined for a search category object, the Drilldown business component property must be populated. The Drilldown View property does not have to be populated.

To create a preview view for Search

- 1 Log in to Siebel Tools.
- 2 Choose Tools, and then Lock Project (or Alt+L) to lock the project that will contain the Preview View object you want to add.
- 3 Choose an existing applet that best fits your preview purpose.
This applet must be a Form Applet, and must be based on the class *CSSFrameBase*.
- 4 Create a Base type Applet Web Template and comment it as being for Search Preview.
- 5 Map Data type Controls to Applet Web Template Items.
Do not map any button type controls that are command controls.
- 6 Configure a new view, and associate the applet in Base mode with your new view.

- 7 Associate this view with a screen that will exist in the application where you are running Search Center.
Viewbar Text and Menu Text are not required.
- 8 Compile your changes in the SRF file.
Be sure to add the view to the user's responsibilities and restart the services to refresh the responsibilities.

Configuring Access Control for Search Operations

Access control for Search is determined by the fields, `sblvisibilityid` and `sblvisibilityinfo`, in the file `<application_suite>_OSSES_Field-Mappings.xml`. For more information on each visibility field, see ["Defining Index Attributes" on page 72](#).

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

- 1 Navigate to the Administration – Search screen, and then the Search Index Settings view.
- 2 Select the Search Category for which searchable fields are to be configured in the Search Index Settings applet.
The fields for that 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 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

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

The fields for that 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 table below.

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

- 4 Select Save Record.

Administering Automated Keywords

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” on page 72](#).

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 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 checked 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

8

Configuring Siebel Find

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

- [“About Siebel Tools Configuration Tasks” on page 93](#)
- [“About Siebel Tools Find Objects” on page 93](#)
- [“Siebel Tools Find Object Reference” on page 93](#)
- [“Configuring Searchable Find Categories” on page 99](#)
- [“Configuring the Find Results View” on page 99](#)
- [“Configuring Find and Associate Records” on page 100](#)
- [“Creating Preview Views for Find” on page 101](#)
- [“Configuring Siebel Communications Server and Find Integration” on page 102](#)
- [“Configuring Access Control for Find Operations” on page 103](#)

This chapter assumes a 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 allows you to create and maintain a custom Siebel Repository file (.srf) to store your custom configurations.

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 may 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.

Siebel Tools Find Object Reference

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

- “Find Object” on page 94
- “Application Find Object” on page 95
- “Find Field Object” on page 96
- “Find View Object” on page 97
- “Find Field Locale Object” on page 98
- “Find Locale Object” on page 98
- “Find Pick View Object” on page 99

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

Table 12 lists the Find object properties.

Table 12. 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.
Drilldown View	Optional	The view that appears when the user drills down. If this property is left blank, 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.

Table 12. Find Object Properties

Property	Required	Description
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 may also specify a default find in the Object Properties list.

Application Find Object Properties

Table 13 lists the Application Find object properties.

Table 13. 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 <i>Siebel Object Types Reference</i> . 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 <i>Contact</i> and <i>Account</i> .
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

Table 14 lists the Find Field object properties.

Table 14. 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	<p>Checking 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:</p> <ul style="list-style-type: none"> ■ User Property Name: [Find object Name] ■ User Property Value: [Find Field] = [Length] <p>If there is more than one, use the following applet user property syntax:</p> <p>User Property Value: [Find Field Name] = [Length], [Find Field Name] = [Length], [Find Field Name] = [Length]...</p>

Table 14. Find Field Object Properties

Property	Required	Description
Display in Entry	Optional	Checking this option allows the field to be displayed on the find entry applet in the Search Center.
Drilldown View	Optional	Supports multiple drilldowns. When these properties are configured and Display in Results is set to <i>TRUE</i> , a drilldown link will be rendered for this field in the Find Results List.
Drilldown Business Component		
Drilldown Source Field		

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.)

Find View Object

Each Find view object definition specifies a view that may 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

Table 15 lists the Find View object properties.

Table 15. 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

Table 16 lists the Find Field Locale object properties.

Table 16. 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 <i>ENU</i> 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

Table 17 lists the Find Locale object properties.

Table 17. 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 <i>ENU</i> 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 top applet 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. For more information see [“Configuring Find and Associate Records” on page 100](#).

Find Pick View Object Properties

Table 18 lists the Find Pick View object properties.

Table 18. 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
Name	Required	Logical name of the pick view
Field Name	Optional	Name of the multivalue group field that will receive the search result

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 Center Look In list.
- 4 Make sure that the relevant Business Components are part of the Search Execution Business Object.
- 5 Compile your changes to the Siebel Repository File.

Configuring the Find Results View

The Find results can be configured to display either in Quick Find mode in the business component view on the right, or under the Search Look In in the Find Results view on the left. The display options differ as follows:

- **Quick Find Mode.** Displays the Find results in the business component view on the right, and bypasses the intermediate Find results page. For example, if the Find results are configured to display on the right, and the Contacts category is selected for the Find operation, the Find results are displayed on the right in the All Contacts Across Organization business component view. In this mode, the list of Find results is lost when the user drills down on an individual Find result. Preview and Attach features are not available in this mode.
- **Results Retention Mode.** Displays the Find results in the Find Results view on the left, under the Look-In applet. In this mode, the user can drill down on a record to get the detailed record information displayed on the right hand side, and the Find results are retained under the Look In panel on the left hand side. Preview and Attach features are available in this mode

The Find results view is configured in Siebel Tools.

NOTE: If Preview or Attach features are required, the Find results must be configured to display in the Find Results view on the left hand side.

To configure the Find results view

- 1 Log in to Siebel Tools.
- 2 In the Object Explorer, select *Applet*.
- 3 Query for the *Find Applet*.
- 4 Choose *Tools* and *Lock Project* (or Alt+L) to lock the project.
- 5 Select *Applet User Prop*, and then *GoToView*.
- 6 Configure the *GoToView* value as follows:
 - a Set *GoToView* to an empty value to display the Find results in the business component view on the right.
 - b Set the *GoToView* value to *Find Results View* to display the Find results in the Find Results view on the left under the Look-In panel.
- 7 Compile the Siebel.srf file.
- 8 Restart the Siebel Server.

Configuring Find and Associate Records

Users can associate Find results from the search center with the active record in the top applet 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.

In order to attach a record in the Find Results list applet to an active parent object in the Content Area, the relationship between the record and the applet must be many-to-many. In Siebel Tools, this relationship is implemented by creating a link between the two business components with an intersection table. If you check a business object and find out that a Find object is one of its business components, and there is a many-to-many link between them, it is permissible to attach this result row to an object.

This association happens in the business object layer, in terms of Siebel Three-Level Architecture. But to support the user to go to a view directly to verify the association, there is a requirement that Pick View be added to the Find object. This Pick View defines the view that users can go to after an association occurs, as well as the candidate association. You must add new Pick Views in order to add this Find object to a business object.

Find Pick Views have been created for all existing business components. Find Pick Views must be created in Siebel Tools for any new or custom business component.

To create Find Pick Views for custom business components

- 1 Log in to Siebel Tools.
- 2 Lock the project that will contain the Pick View object you want to add.
- 3 In the Object Explorer choose Find, and then Find Pick View.
- 4 In the Find Pick Views window, create a new record, and enter the required property values.
See [Table 18](#) for a description of the properties.
- 5 To commit your changes, click anywhere outside the modified row, or move outside the row using the up and down arrow keys.
- 6 Compile your changes to the SRF file.

Creating Preview Views for Find

In order for a user to preview a result record, you must define the view to use for the preview. You define the view by setting the Preview property of the Search Category object or Find object. The view will show up in a pop-up window when the user clicks on the Preview button. Siebel Search does not support any navigation in the pop-up Preview view. The Preview view is read-only with no navigation buttons.

When you have a preview view defined for a search category object, the Drilldown business component property must be populated. The Drilldown View property does not have to be populated.

The Find Object Preview property is used to define preview views for both Find and Search. See [Table 12 on page 94](#) for information on the Preview property.

To create a preview view for Search

- 1 Log in to Siebel Tools.
- 2 Lock the project that will contain the Preview View object you want to add.
- 3 Choose an existing applet that best fits your preview purpose.
This applet must be a Form Applet, and must be based on the class *CSSFrameBase*.
- 4 Create a Base type Applet Web Template and comment it as being for Search Preview.
- 5 Map Data type Controls to Applet Web Template Items.
Do not map any button type controls that are command controls.

- 6 Configure a new view, and associate the applet in Base mode with your new view.
- 7 Associate this view with a screen that will exist in the application where you are running Search Center.

Viewbar Text and Menu Text are not required.
- 8 Compile your changes in the SRF file.

Be sure to add the view to the user's responsibilities and restart the services to refresh the responsibilities.

Configuring Siebel Communications Server and Find Integration

This topic covers defining Find parameters for the CTI (Computer Telephony Integration) *OnInboundCallReceived* event response to automatically launch the Search Center, with pre-populated Find 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 *FindDialog*, *FindField.CSN*, and *FindField.First Name* event response parameters are defined for the *OnInboundCallReceived* Event Response, then the Search Center is automatically launched when the agent accepts a call, and is pre-populated with the information specified in the Find Event Response parameters.

See *Siebel Communications Server Administration Guide* for more information on Siebel CTI.

To configure an *OnInboundCallReceived* Event Response for CTI and Find Integration

- 1 Navigate to the Administration - Communications screen, and then the All Configurations view.
- 2 Select the Configuration for which to define the Event Response.
- 3 Select the Event Handlers tab.
- 4 Select the *OnInboundCallReceived* Event Response.

- 5 Click the Event Response Parameters view tab and configure the Find parameters. Some fields are described in the following table.

Field	Description
FindDialog	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 needs to match that defined in the <i>Find</i> column of the <i>Application Findview</i> in Siebel Tools for the Siebel application that you are using.
FindField.<Find Field Name>	<p>The <i>FindField.<Find Field Name></i> Event Response Parameter can be used to dynamically pre-populate Find fields in the Search Center.</p> <p>The following sample <i>FindField.<Find Field Name></i> Event Response Parameters are used to define pre-populated field values for the <i>Service Requests</i> Find Category:</p> <ul style="list-style-type: none"> ■ <i>FindField.CSN</i>. This field must be set to <i>{ANI}</i> to pre-populate the Service Requests <i>CSN</i> (Customer Service Number) field with the incoming telephone phone number. At runtime, on answering a call from the CTI toolbar, the Find <i>CSN</i> field in the Search Center is pre-populated with the telephone number of the incoming call. ■ <i>FindField.First Name</i>. This field must be set to <i>{@UserName}</i> to pre-populate the Service Requests <i>First Name</i> field with the agent's User Name. At runtime, on answering a call from the CTI toolbar, the Find <i>First Name</i> field in the Search Center is pre-populated with the agent's <i>User Name</i> for the Siebel application.

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. 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*.

9

Using Siebel Search

This chapter describes Siebel Search end user functionality. It includes the following topics:

- [“Siebel Search End-User Experience” on page 105](#)
- [“Setting Search Preferences” on page 105](#)
- [“Basic Search Retrieval” on page 106](#)
- [“Performing a Basic Search Operation” on page 108](#)
- [“Performing an Advanced Search Operation” on page 110](#)
- [“Saving Search Criteria” on page 111](#)
- [“Performing a Find Operation” on page 111](#)
- [“Associating Results with the Active Record” on page 112](#)

Siebel Search End-User Experience

The Search Center is a central location where users can perform searches and queries on configured data sources. The user may enter a full-text query in the Search box, or may click the Advanced Search link, and perform a search against single or multiple categories and data sources. The Look In list displays categories in the following order: Find Objects, which are database queries, followed by Search Categories which have been indexed and can be queried against. The search categories map to individual business components. Multiple search categories can be grouped into logical collections, to enable a single search to be executed against multiple search categories. The *Look In* field is preconfigured with different search categories, depending on the Siebel application. See [Appendix A, “Preconfigured Search Objects”](#) for the list of preconfigured search objects provided for each Siebel application. The search categories can be configured by the administrator in the Search Definition view of the Search Administration UI. Users can perform queries against Siebel business component records from anywhere in their Siebel application.

Setting Search Preferences

You can set search preferences to configure search result formats such as the number of result records displayed on each page, and the default sort mechanism. Search preferences are applied only to Search operations, and are not applied to Find operations. After configuring the search preferences you must log back into the Siebel application for the preferences to take effect.

To set search preferences

- 1 Navigate to the Search screen, and then the Search Preferences view.

2 To change the scope of your search, choose from the options in the following table.

Field	Description
Number of Records	From the list, choose the number of records to display on each page in the Search Results view.
Results Window	Check if you want the search results displayed in a new browser window.
Default Sort	Results can be sorted by the following options: <ul style="list-style-type: none"> ■ Data Source. The results can be sorted by individual business component, for example, Service Request or Account, or by external data source, for example by File System or Web Crawler. ■ Date. The date that the document was last modified. ■ Relevance. The relevance ranking is determined by search engine algorithms and is based on variables such as proximity and frequency. This is not configurable in Siebel Search. ■ Result Type. The result data type, for example, a database record or a PDF document.
Context Sensitivity	Check the Context-Sensitive option if you want the Look In default option set by the screen context, for example, if the Search Center is invoked from the context of a particular screen, such as Service Request, the Look In control will automatically be set to that Search object.
Criteria Reservation	The Criteria Reservation is configured using the following options: <ul style="list-style-type: none"> ■ Resume previous search. The search criteria of the previous search operation is preserved, and the search fields are pre-filled for the subsequent search. ■ Clear previous search. The search criteria of the previous search operation is deleted.

3 Click Save Preference.

Basic Search Retrieval

Basic Search allows you to perform full text searches using Boolean operators. Boolean operators allow you to create a more precise query.

Single Term Search

This search technique allows you to enter a single keyword, and receive results based on that term. For example, if you enter the word Siebel, results that contain the word Siebel are returned.

Multiple Term Search

This search technique allows you to enter two or more keywords. The implicit Search Term Separator is AND. For example, if you enter the text performance tuning, it is executed as performance AND tuning. Only results that contain all search terms are returned.

Phrase Searches

This search technique allows you to conduct a search for records where a chosen phrase is contained. For example, if you enter the phrase "computer science" (quotes included) records containing the word *computer* followed by a space and then the word *science* are returned.

Wildcard Searches

This search technique allows you to find pages containing words similar to a given word. You use the wildcard character either to represent a single character, or an optional sequence of characters. For example, if you enter comput*, the search returns words that have the same prefix comput, such as computer, computing, and so on.

Special Character Searches

This search technique retrieves special characters other than those facilitated by wildcard searches. For example, if you search for the word *on?line*, the search returns matches to *on line*, *on-line*, *on;line* and *on.line*.

Searching Logical Collections

The user may choose from a number of categories listed in the Look In list against which they can search. Multiple search categories can be grouped in a single logical collection, for simultaneous searching. Logical collections are defined in the Search Indices Parent Category View of the Search Administration UI. For information on defining logical collections, see ["Creating a Logical Collection" on page 81](#).

Previewing Search Results

When the Preview option in the Search Center is invoked, a database record is opened in a popup window allowing users to view the record without changing their current application context. External files are opened and presented in their native application.

Setting the Customer Dashboard

Employees can update the open dashboard with the selected search result.

Sorting Search Results

After obtaining results of a search, the user may sort the results by relevance, data source, result type or date.

Refining Results Using Automated Keywords

Dynamic keywords are generated by Oracle Secure Enterprise Search, and are displayed in the search results applet. After obtaining results of a search, the user may further refine the results based on dynamically generated keywords. The selected keyword is processed with the previous search criteria in a Boolean AND operation.

Saving Search Queries

The search criteria can be saved for re-use. Saved searches are listed in the Recent Saved Searches applet in the Search Center.

Performing a Basic Search Operation

The type of object that you choose from the Look In list determines whether you execute a Find or a Search operation. Search results are filtered based on the user's Visibility ID. See the Access Control chapter in the *Siebel Security Guide* for more information on access control.

To perform a search

1 Do one of the following:

- Click the binoculars on the application toolbar.
- From the application-level menu, choose View, Action Pane, and then Search.

The Search Center appears in a frame on the left part of the application window.

2 From the Look In list, select the Search Object you want to search against. The Look In list displays categories in the following order; each category is separated by a dotted line:

- Find categories, which are Find objects that database queries can be executed against.
- Search categories, which are business components that have been indexed and can be queried against.
- External data sources, which are Search objects that have been indexed and can be queried against.

- 3 Enter your search criteria in the Search For field and click Go. The Search For field is disabled for Find operations. The following table describes supported operators for the search engine.

NOTE: Oracle Secure Enterprise Search does not support single character searches.

Search Operator	Function	Syntax and Description
* (Asterisk)	Wildcard	Placed at the end of a string, returns items containing the string, or containing the string plus any additional characters at the position at which it appears, up to (or beginning with) a space. For example, searching for the string <i>Ora*</i> returns all words beginning with <i>Ora</i> , such as <i>Oracle</i> and <i>Orator</i> .
AND &	Boolean AND	Placed between search terms, returns only records and documents containing both terms. For example, searching for <i>Oracle AND Siebel</i> returns only records and documents containing both terms.
OR 	Boolean OR	Placed between search terms, returns records and documents containing either term or both terms. For example, searching for <i>Oracle OR Siebel</i> returns only records and documents containing one or both terms.
- NOT	Exclusion	Placed before search terms, returns only records and documents that do not contain the search term. For example, searching for <i>Oracle -Siebel</i> returns only records and documents that contain <i>Oracle</i> and that do not contain <i>Siebel</i> .
" " (Quotation marks)	Phrase Search	Surrounds a string that, unless modified by a wildcard, must be matched exactly. Allows searching for groups of words in their exact order. For example, searching for <i>"Oracle Secure Enterprise Search"</i> returns only records and documents that contain the entire phrase <i>Oracle Secure Enterprise Search</i> .

For more information on Oracle Secure Enterprise Search syntax rules, see *Oracle Secure Enterprise Search Administrator's Guide*.

- 4 From the Search Results view, click the hyperlink to go to the results of your search.
Search results can be further refined by Relevance, DataSource, ResultType or Date.

NOTE: Sorting is applied to the search results that appear in the results page rather than the entire result set.

Performing an Advanced Search Operation

Siebel Search results can be further refined using the Advanced Search option. Advanced Search is enabled only when a search engine has been configured and set as the default, see [“Activating the Search Engine” on page 36](#).

To perform an advanced search

- 1 Enter your search criteria in the Search for field.

NOTE: Oracle Secure Enterprise Search does not support single character searches.

- 2 From the Look In list, select the type of information you want to find.

The type of information that you choose from the Look In list determines the fields that are available to you when entering the search criteria.

- 3 Click Advanced Search. The following table describes the Advanced Search options.

Option	Description
All these words	This option performs a Boolean AND search operation. This option returns only records and documents containing all search terms. For example, inputting <i>Oracle Siebel</i> returns only records and documents containing both <i>Oracle</i> and <i>Siebel</i> .
Any of these words	This option performs a Boolean OR search operation. This option returns records and documents containing one or more of the search terms entered. For example, inputting <i>Oracle Siebel</i> returns records and documents containing <i>Oracle</i> , or <i>Siebel</i> , or both.
Exact phrase	This option returns records and documents that exactly match the entered phrase. For example, searching for <i>Oracle Secure Enterprise Search</i> returns only records and documents that contain the entire phrase.
None of these words	This option returns only records and documents that do not contain the search term.
Look In	The Advanced Search Look In field displays the business components that have been indexed for that Search Definition. Select the business component or components to include in the advanced search operation.
Modified Between	Select this option to get search results for files modified between two particular dates.

Option	Description
File Format	<p>This option provides the ability to search by file format. The files are processed by MIME type for this search operation. The search can be filtered by the following file types:</p> <ul style="list-style-type: none"> ■ All ■ Microsoft Excel ■ Microsoft PowerPoint ■ Microsoft Word ■ PDF
Data Source	<p>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” on page 48. To enable the Web Crawler Connector, see “Process of Setting Up the Web Crawler Source and Connector for Oracle Secure Enterprise Search Integration” on page 50.</p>

- 4 From the Search Results view, click the hyperlink to go to the results of your search.

Saving Search Criteria

Search criteria can be saved to the Recent Saved Searches list for future use. Selecting saved search criteria from the Recent Saved Searches list executes the search. Saved Searches can be queried or deleted in the Saved Searches view.

To save your search criteria

- 1 Click Save Search in the Search Results view.
- 2 In the Save As field, enter a unique name for your search.
- 3 In the Note field, enter a brief description of your search.
- 4 Click Save.

Performing a Find Operation

Siebel Find supports real-time database queries on a field-by-field basis. The Find functionality is independent of any search engine. The type of object that you choose from the Look In list determines whether you execute a Find or a Search operation.

Find results are filtered based on the user's Visibility ID. For more information on access control for Find operations, see the Access Control chapter in *Siebel Security Guide*. Preview and Associate functionality is available for Find results if the Find results have been configured in Siebel Tools to display in the Find Results view.

To perform a Find operation

1 Do one of the following:

- Click the binoculars on the application toolbar.
- From the application-level menu, choose View, Action Pane, and then Search.

The Search Center appears in a frame on the left part of the application window.

2 From the Look In list, select the Find category you want to search against. The Find categories are listed first, and are separated from the Search categories by a dotted line.

3 Enter your search criteria in the category fields and click Go.

The Find results are displayed in the Find Results view under the Look In panel.

4 Click the hyperlink to go to the results of your Find operation, or select the Preview button to preview the Find results.

Associating Results with the Active Record

The Associate function enables you to associate two data types that have a parent-child relationship. The Find results can be associated with the Siebel object, where a relationship has been defined between the object types in Siebel Tools, and a value has been populated in the Link Inter Table field. For example, in Siebel Tools, the Service Request Business Object is a parent object of the Solution Business Object Component, and the link between the two objects is set to active, with a value in the Inter Table field. Solution result records can therefore be associated with the active Service Request record on the Dashboard.

If you select a record that has an associated attachment, clicking on the attachment name opens the attachment in its native application. Only one result can be attached to a parent record at any one time.

To associate a result record with a Siebel object

1 In the application window, display the record with which you want to associate the result record.

2 On the Siebel application toolbar, click the Search button and perform a search to find the record to attach.

The records that match your search criteria appear in the Find Results list.

3 In the Find Results list, select the record to associate, then click Attach.

The record is attached to the active record in the application window.

A

Preconfigured Search Objects

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

- ["Call Center Searchable Objects" on page 113](#)
- ["eService Searchable Objects" on page 113](#)
- ["Sales Searchable Objects" on page 114](#)
- ["Service Searchable Objects" on page 114](#)
- ["Application and Search Definition Mappings" on page 114](#)

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

eService Searchable Objects

This topic lists the business components that are preconfigured as searchable objects in the eService 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 [Chapter 5, "Configuring Index Mappings."](#)

Application and Search Definition Mappings

[Table 19](#) lists the preconfigured mappings in the application configuration files between Siebel Business Applications and Search Definitions. See ["Creating a New Index Definition" on page 79](#) for information on creating and customizing Search Definitions.

Table 19. Siebel Application and Search Definition Mappings

Siebel Application	Search Definition
Siebel Automotive	Call Center Definition
Siebel Call Center	Call Center Definition

Table 19. Siebel Application and Search Definition Mappings

Siebel Application	Search Definition
Siebel Consumer Sector	Call Center Definition
Siebel Customer Relationship Console	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 eMarketing	eMarketing 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 eSales	eSales Definition
Siebel eSales for CME	eSales Definition
Siebel eService	eService 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

Table 19. Siebel Application and Search Definition Mappings

Siebel Application	Search 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 Marketing Enterprise	Marketing Definition
Siebel Medical	Call Center Definition
Siebel Mobile Connector	Sales 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

B

Syntax for Filter Search Specifications

This appendix covers the syntax for filtering the index record-set to incorporate custom business rules. See [Chapter 6, “Administering Siebel Search Index Settings”](#) for information on using the *Filter Search Spec* field. This appendix 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 Administration - Search Definitions and Search Index Settings views.

This topic includes the following subtopics:

- [“Precedence” on page 117](#)
- [“Comparison Operators” on page 118](#)
- [“Logical Operators” on page 118](#)
- [“Pattern Matching with LIKE and NOT LIKE” on page 118](#)
- [“Functions in Calculation Expressions” on page 120](#)

Precedence

Precedence refers to the order in which the various search operators within the filter search query specification are evaluated. [Table 20](#) 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.

Table 20. Level of Precedence

Level	Operator
1	()
2	NOT
3	AND
4	OR

Comparison Operators

Table 21 describes the purpose of each comparison operator, and gives an example of how it is used.

Table 21. Comparison Operators

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

Table 22 explains what a value of TRUE or FALSE means for each logical operator.

Table 22. Logical Operators

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 [Table 23](#).

Table 23. Pattern Matching Using Special Characters

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 [Table 24](#).

Table 24. Functions That May Be Used in Filter Search Specifications

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 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 (for example, 6/30/07).
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.

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