Siebel Collaboration Guide

Version 8.0

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Contents

Chapter 5: Configuring Siebel Collaboration

Index

1 What's New in This Release

What's New in Oracle's Siebel Collaboration Guide, Version 8.0

Table 1 lists changes described in this version of the documentation to support release 8.0 of the software.

Table 1. What's New in the Siebel Collaboration Guide, Version 8.0

Topic	Description
"Configuring the Collaboration Service" on page 18	Added details for new installation configuration wizard.

2 Overview of Siebel Collaboration

This chapter describes the Siebel Collaboration product. It includes the following topics:

About Siebel Collaboration

Siebel Collaboration integrates Microsoft SharePoint with Siebel Business Applications. It allows Siebel users to create SharePoint sites (called team spaces) from within the Siebel application.

Each team space is based on a particular Siebel object record, such as an opportunity or service request. The team space dynamically displays data about the record in the Siebel Web Part. The team space contains other Web Parts such as discussion threads, online presence indicators, and document-posting areas.

Siebel users can view and update team spaces associated with their records from within the Siebel application. (See Figure 1 on page 9.)

Employees can also access the team spaces directly through their browser windows, in the same way that they access other SharePoint sites.

Opportunity and service request objects are supported out-of-the-box. However, using Siebel Tools, you can configure your application so that you can create team spaces for other business objects, such as accounts or marketing campaigns.

A Usage Example for Siebel Collaboration

A first-level support engineer at a large software company opens a service request on behalf of a customer. One of the customer's critical workflows, which routes quote requests, is running slowly.

The support engineer asks the customer the standard questions about server processing power and system memory and then reviews the knowledge base for a solution. Unfortunately, he is unable to find a solution, so he escalates the service request to the second-level support engineer who is the call center's expert on workflow.

The second-level engineer reviews the service request and determines that a resolution requires more workflow expertise than is available within the call center. She creates a team space area for this service request by clicking the Create Team Space button on the Service Requests screen.

All users of the Siebel application who have visibility to the service request record can view the team space. The support engineer clicks the Add Member button in the team space to invite other employees in the company who she believes can help resolve the customer's problem. The employees she invites are the product manager and engineering manager for workflow, the customer's account manager, and the consultant who implemented the workflow.

The support engineer posts the problematic workflow in the documents area of the team space. Then, she sees that the online presence indicators in the team space show both the product manager and engineering manager are online. She initiates a chat session with them, and they review the problem together.

The engineering manager takes an action item to create an alterative workflow for the customer. This action item is posted in the action-item list in the team space so that other members can monitor his progress on this item.

The support engineer captures the text from the chat session and posts it in the team space for the benefit of others. She also starts a discussion thread to solicit solution ideas from other team-space members.

When the customer's account manager views the team space, he is immediately brought up–to–date about the service request. He downloads the new workflow posted by the engineering manager and incorporates some ideas from the discussion thread. He takes an action item to work with the customer to try the new workflow.

Meanwhile, the customer's sales representative has heard about the service request and is concerned that the current problem could cause the deal that she is working on with this customer to fall through. However, she is reassured when she reviews the information in the team space and sees the progress being made. She likes being able to access all this information without having to contact each person involved.

The new workflow implemented by the account manager solves the problem. The account managers and the support engineer document the solution. The document check out and revision features in SharePoint allow them to work jointly on the report.

When the product manager and engineering manager next look at the team space, the report is flagged as new. They are happy to learn that proposed workflow solved the problem and that all the information about the problem is stored in the team space for future reference.

NOTE: This case describes the use of Siebel Collaboration in resolving a service request. For an example of using Siebel Collaboration with opportunities, see "Scenario for Using Siebel Collaboration" on page 26.

Components of the Team Space

Figure 1 on page 9 shows a team space for an opportunity. In this case, the team space is viewed from within the Siebel application.

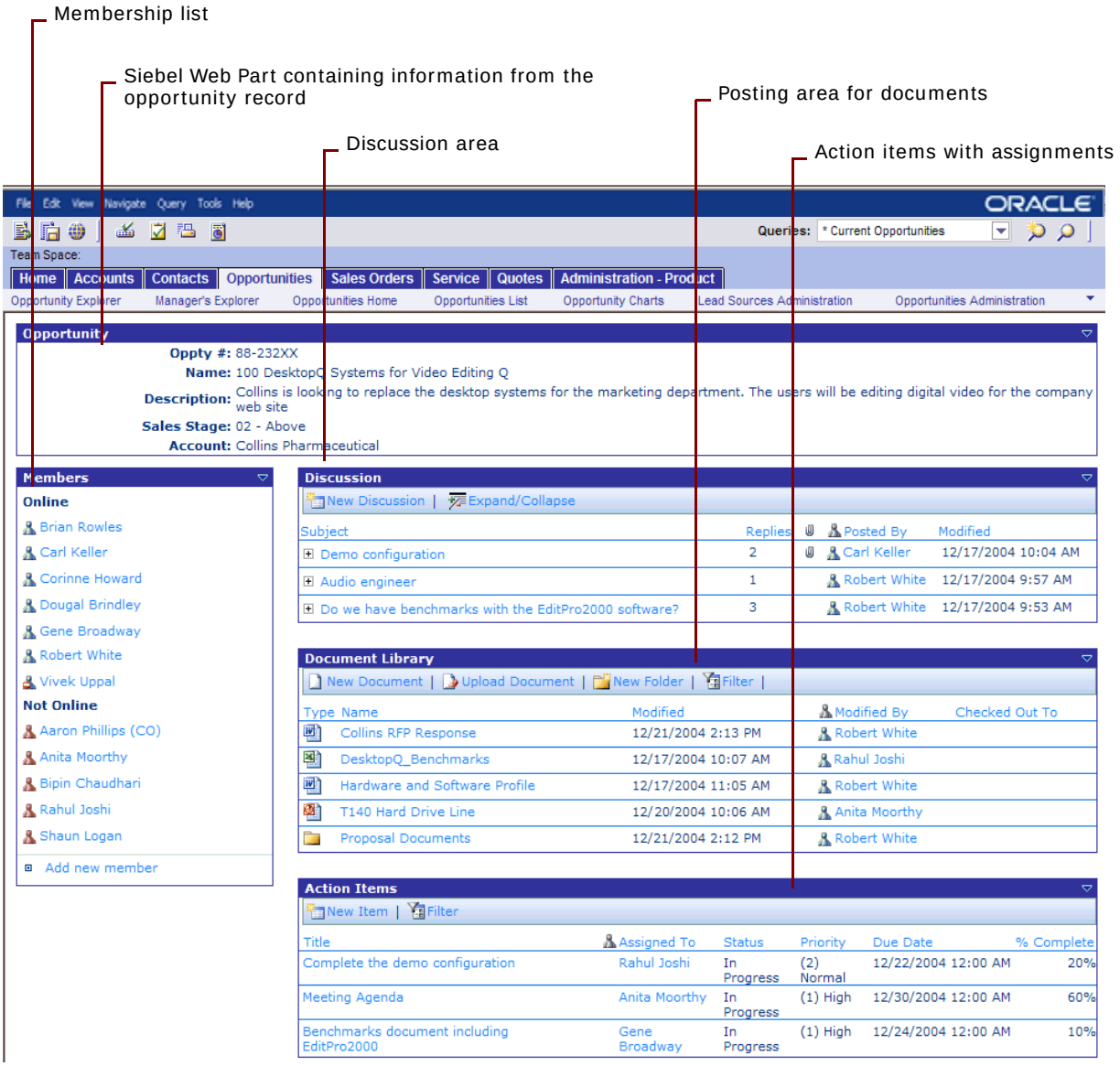

Figure 1. Example Team Space (for an Opportunity Record)

3 Getting Started with Siebel Collaboration

The tasks in this chapter are for a standard setup of Siebel Collaboration:

About Siebel Collaboration Tasks

This chapter lists the setup tasks that are specific to Siebel Collaboration. Use this chapter in combination with the *Siebel Applications Administration Guide* and the *Siebel Security Guide*.

The *Siebel Applications Administration Guide* and the *Siebel Security Guide* cover the setup tasks that are common to all Siebel Business Applications, such as using license keys, defining employees, and defining your company's structure. The *Siebel Applications Administration Guide* also provides the information that you need to perform data administration and document administration tasks.

Standard Setup

This chapter describes a standard setup of Siebel Collaboration:

- For opportunity and service request objects
- In the ENU language and locale

NOTE: Siebel Collaboration is configurable. For information about configuring Siebel Collaboration, including configuring for other business objects and languages, see Chapter 5, "Configuring Siebel Collaboration."

Requirements for Setting Up Siebel Collaboration

Before you begin, install and setup:

- Siebel application (for example, Siebel Sales, Siebel Call Center and so on).

- SharePoint application and other required third-party software listed in *Siebel System Requirements and Supported Platforms* on Siebel SupportWeb.

About User Authentication

Table 2 describes the credentials used when setting up Siebel Collaboration.

Table 2. Credentials in a Siebel Collaboration Setup

User Credential	Corresponding Machine or Application
Windows user	Client machine
Collaboration user	SharePoint application
Siebel user	Siebel application

You must configure SharePoint to use Integrated Windows Authentication (which uses the Windows user credentials for authentication). Make sure that the SharePoint and client machines use the same ADSI source for user authentication.

For the Siebel application, you can use any of the user authentication methods described in the *Siebel Security Guide*. However, you must make sure that there is a mapping between the Siebel user credentials and the SharePoint user credentials. There are two ways to set up this mapping: ADSI (Active Directory Service Interfaces) and SSO (single sign-on). Table 3 on page 12 describes the user credential mappings for SharePoint and your Siebel Application.

Table 3. User Credential Mapping for SharePoint and Your Siebel Application

User Authentication Type	User Credentials Mapping	CFG UserAuthentication Parameter[1] Setting
■ ADSI	Based on ADSI. The same user names and passwords are used for: ■ Client machine ■ SharePoint ■ Siebel application	ADSI
■ LDAP ■ Database Authentication ■ Custom ■ Web Single Sign-On (SSO)	Set up through an SSO table.	SSO

1. Further information on setting this parameter is available in "Editing the Siebel Application CFG File for Siebel Collaboration" on page 14.

Related Topics
Siebel Security Guide

Process of Setting Up Siebel Collaboration

This section details sample tasks often performed by administrators in order to complete the configuration of collaboration. When the administrator completes these tasks, the Teamspace and Collaborate buttons are configured for the application.Your company may follow a different process according to its business requirements.

Administrator Procedures

The following list shows tasks administrators typically perform in order to complete the configuration of collaboration.

To set up Siebel Collaboration, perform the following tasks:

1. “Recording Server Names and Directory Paths for Siebel Collaboration Setup” on page 13
2. “Editing the Siebel Application CFG File for Siebel Collaboration” on page 14
3. “Setting Up the Single Sign-On Table for Siebel Collaboration” on page 16
4. “Setting Up the Symbolic URL for Access to the SharePoint Portal Server” on page 17
5. “Configuring the Collaboration Service” on page 18

Recording Server Names and Directory Paths for Siebel Collaboration Setup

Table 4 lists some information that you need to know about your system to complete Siebel Collaboration setup.

This task is a step in “Process of Setting Up Siebel Collaboration” on page 13.

To record information required during setup

■ Print Table 4 and write in the values for your SharePoint environment under the examples.

Table 4. Information You Need to Complete Siebel Collaboration Setup

Item	Format and Comments	Examples
SharePoint host machine name	The name of the machine where the SharePoint server is installed.	*sharepoint_server*
SharePoint portal site	The URL for the SharePoint portal site. `http://sharepoint_portal_site:port`	*sharepoint_portal_site*
Web Site directory for the SharePoint portal site	The directory where the Web site files for the SharePoint portal site are stored.	*C:\inetpub\sharepoint_portal_site*
SharePoint Services Web Service Extension directory	*local drive*:\Program Files\Common Files\Microsoft Shared\web server extensions\60	*C:\Program Files\Common Files\Microsoft Shared\web server extensions\60*
Siebel Web Server host machine name	The name of the machine where the Siebel Web Server is installed.	*siebel_web_server*
ADSI domain name	The domain name for the ADSI user.	*domain_name*
Siebel Collaboration Service Installer	The location of Oracle's Siebel Collaboration Service Installer.	*C:\Windows\Server\Siebel_Collaboration_Service*

Editing the Siebel Application CFG File for Siebel Collaboration

The following procedure describes how to enable Siebel Collaboration by editing the CFG file for your Siebel application.

For general information about editing CFG files, see the *Siebel System Administration Guide*.

This task is a step in "Process of Setting Up Siebel Collaboration" on page 13.

To edit the CFG file for your application

1 Open the CFG file for the application and to edit the Siebel application CGG file, add the section:

```
[Collaboration]
CollaborationEnabled = TRUE
SecurityToken = l5t42j6d9w73
VerifyCollaborationUser = TRUE
UserAuthentication = CHANGE_ME (ADSI/SSO)
DomainName = CHANGE_ME
SSOSystem = "Team Space Collaboration"
```

2 Edit the [Collaboration] section, using the following table as an example:

Parameter	Value	Notes
CollaborationEnabled	■ TRUE	Set to TRUE to enable Siebel Collaboration for the Siebel application.
SecurityToken	■ *SecurityToken* For example: l5t42j6d9w73	This security token must be the same as the security token set in the config.xml file. (See "Configuring the Collaboration Service" on page 18.) The security token is used by the Siebel Web Service running on the SharePoint server to verify the request is from a Siebel application. Choose a value that: ■ Is less than 65 characters ■ Contains only Unicode characters that are recognized by common text editors ■ Is sufficiently unique that a malicious user cannot guess it
VerifyCollaborationUser	■ TRUE ■ FALSE	If set to TRUE, the Siebel application checks that the user of the client machine is the same as the user logged into the Siebel application. If set to FALSE, no check is performed. For example, if multiple Siebel users share one Windows user, set this parameter to FALSE.
UserAuthentication	■ ADSI ■ SSO	Set the value corresponding to the user authentication method used for your Siebel application: ADSI or SSO. (See Table 3 on page 12.)

Parameter	Value	Notes
DomainName	■ *domain_name*	Set the value to the domain of the Windows user. This value is case sensitive. **NOTE:** If user credentials are not prefixed with the domain name, then this domain is used.
SSOSystem	■ "Team Space Collaboration"	You only need to set this parameter if UserAuthentication=SSO. This value specifies the SSO record that contains the mapping between the Siebel and Windows users.

3 If, in Step 2, you set UserAuthentication to ADSI, you must navigate to Administration – Server Configuration > Profile Configuration View in the Siebel application.

4 Select the record for the ADSI Security Adapter (alias ADSISecAdpt).

5 Ensure that the UsernameAttributeType and UseAdapterUsername parameters are set as described in *Siebel Security Guide*.

Setting Up the Single Sign-On Table for Siebel Collaboration

You must set up the SSO (single sign-on) table from within your Siebel application. You do not need to set up the SSO table if you use ADSI authentication for your Siebel application. (See Table 3 on page 12.)

This task is a step in "Process of Setting Up Siebel Collaboration" on page 13.

To set up the single sign-on table

1 In the Siebel application, navigate to Administration - Integration screen > SSO Systems Admin List view.

2 In the SSO Systems Administration list, select the Team Space Collaboration record.

3 In the SSO System Users list, create a new record and complete the necessary fields for each Siebel Collaboration user.

Some fields are described in the following table.

Field	Comments
Login Name	Windows user login name. For example, MSTERN or *domain_name*\CCHENG. If the domain name is not included, it is read from the CFG file.
Password	This field is not required.

Multiple Siebel users can be mapped to one Windows user.

Setting Up the Symbolic URL for Access to the SharePoint Portal Server

This URL format specifies the addresses of new team spaces that are created from within the Siebel application:

- http://SharepointHost/sites/[ObjectType]_[ROW_ID]/default.aspx

Where:

- *[ObjectType]* is Opp or SR, depending on whether the team space is based on an opportunity or service request record.
- *[ROW_ID]* is the ID number of the originating opportunity or service request record.

This task is a step in "Process of Setting Up Siebel Collaboration" on page 13.

To set up the symbolic URL for access to the SharePoint Portal Server

1 Navigate to the Administration - Integration screen > WI Symbolic URL List view.

2 From the Show drop-down list, choose Host Administration.

3 In the Host Administration list, select the record whose Virtual Name is SharepointHost.

4 Set the Name field for this record to the name of your SharePoint portal site. Do not include the protocol prefix.

For example, if the URL of your SharePoint portal site is at http://*sharepoint_server*:88 then enter *sharepoint_server*:88 in the Name field.

5 From the Show drop-down list, choose Symbolic URL Administration.

6 In the Symbolic URL Administration list, select the CollaborationTeamspace record, and make sure the URL is http://SharepointHost/sites/[ObjectType]_[ROW_ID]/default.aspx

Configuring the Collaboration Service

You configure the Collaboration Service by running the Installation and Configuration Wizard.

To configure the Collaboration Service

1. Start the Installation Wizard.
2. Complete the installation and configuration wizard using the fields described in the following table.

Field	Value
Installation Directory	Installation directory for the Siebel Collaboration Service.
Home Directory	Home directory for the SharePoint Portal Server
Siebel Integration Web Service Name	The name the Siebel Integration Web Services uses to communicate with the Siebel Server.
Integration Service Port Number	The port number the integration service uses. This should only be used by the integration service and remain unused by other Siebel components and third party products.
Windows domain\username	The domain name and username under which the Siebel Integration Web Service will run. This account must have SharePoint administrator services.
Integration Service Port Number	The port number the integration service uses. This should only be used by the integration service and remain unused by other Siebel components and third party products.

Setting Up Inbound and Outbound Web Services for Siebel Collaboration

Complete the steps in the following procedure to set up inbound and outbound Web Services. The inbound Web Service specifies the location of the Siebel Server. This inbound Web Service, named Web Collaboration Service, is a component in the Enterprise Application Integration component (EAI) group.

The outbound Web Service directs the Siebel application to the Siebel-SharePoint Integration Web Service, which handles the interaction between the Siebel application and the Sharepoint application.

This task is a step in “Process of Setting Up Siebel Collaboration” on page 13.

To set up inbound and outbound Web Services

1 Make sure that the Enterprise Application Integration component group is enabled.

This enables the component Custom Application Object Manager which corresponds to the Web Collaboration Service, inbound Web Service. For general information about checking your enterprise and Siebel Server Configurations, see the *Siebel System Administration Guide*.

2 Set up the inbound Web Service:

a Navigate to Administration - Web Services screen > Inbound Web Services view.

b Select the record named Web Collaboration Service.

c In the Service Ports list, Address field, enter the path for the Siebel Server.

`http://siebel_web_server/CustAppSvcs_enu/start.swe?SWEExtSource=CustomUI&SWEExtCmd=Execute&WSSOAP=1`

Make sure that Custom Application Object Manager component is online and running.

NOTE: This is the same URI that you entered when "Configuring the Collaboration Service" on page 18.

3 Set up the outbound Web Service:

a In the link bar, click Outbound Web Services.

b In the Outbound Web Services list, select the record named SiebelSharePointIntegration.

c In the Service Ports list, Address field, enter the URL for your Siebel-SharePoint Integration Web Service, which you set up in "Configuring the Collaboration Service" on page 18.

For example, `http://sharepoint_server:port/siebelsharepointintegration.asmx`

This task completes the process of setting up Siebel Collaboration. After completing this task, see Chapter 4, "Using Siebel Collaboration." Alternatively, if you have problems with your setup, see "Troubleshooting Siebel Collaboration Setup" on page 20.

Uninstalling Siebel Collaboration Service

This topic describes uninstalling Siebel Collaboration Service.

To uninstall Siebel Collaboration Service

1 Open the uninstaller.exe from the ...Installer_uninst\collaboration folder on the local machine. Click Next.

2 Select Siebel SharePoint from the list.

Click Next and Finish.

3 Open Internet Information Services.

4 Open the Application Pools directory and verify that the SiebelSharePointIntegration application pool exists.

5 Open the Web Sites directory and verify that the Integration Web Services site exists.

6 Verify that a log file is created in the Installer\log folder.

TIP: Navigate to the following locations and verify that the related files have been updated or removed after the uninstallation.

Field	Verification
C:\Inetpub\wwwroo\	The BIN folder does not exist.
C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\60\Config\wss_minimaltrust.config	The Code group does not exist.
C:\Program Files\Common Files\Microsoft Shared\web server extensions\60\TEMPLATE\1033	The Siebel Site template folder does not exist.
C:\Program Files\Common Files\Microsoft Shared\web server extensions\60\TEMPLATE\1033\XML	The WEBTEMPSIEBEL.XML file does not exist.
C:\Program Files\Common Files\Microsoft Shared\web server extensions\60\TEMPLATE\THEMES	The uninstaller removes this folder.
C:\Program Files\Common Files\Microsoft Shared\web server extensions\60\TEMPLATE\LAYOUTS\1033\SPTHEMES.xml.	The Siebel entry is not available in the SPTHEMES.xml file.

Troubleshooting Siebel Collaboration Setup

This topic provides guidelines for resolving Siebel Collaboration setup problems.

You can find information to help you diagnose setup problems with Siebel Collaboration in the following files:

- There are two Siebel Server log files you must verify. The log file for the Siebel application, for example, the log file for the Call Center application contains SCCObjMgr_enu in the file name. Secondly, the log file for the Siebel inbound Web Service. This is the log file associated with the Custom Application Service and contains CustomAppObjMgr in the file name.

  For debugging Siebel Collaboration, it is recommended that you set the log level to 5.

NOTE: For general information about Siebel log files, see the *Siebel System Monitoring and Diagnostics Guide*.

- The Event Viewer (Application log) on the SharePoint server. The Siebel Web Part logs entries with the Siebel Web Part. Similarly, the Siebel-SharePoint Integration Web Service logs entries the Event Source of the Siebel SharePoint Integration Web Service.

  Logging to the Event Viewer is enabled through the registry files as described in "Configuring the Collaboration Service" on page 18.

If an error occurs in the Siebel application, check the log files on the Siebel Server. If an error occurs in the team space, check the Event Viewer log. If the log indicates a problem on the Siebel Server, then check the Siebel Server log also.

Troubleshooting Reference for Siebel Collaboration Setup

This topic provides guidelines for resolving Siebel Collaboration Setup problems. To resolve the problem, look for it in the list of Symptoms/Error messages in Table 5.

Table 5 on page 21 describes possible symptoms and error messages when setting up Siebel Collaboration and their corresponding causes and solutions.

Table 5. Troubleshooting the Siebel Collaboration Setup

Symptom / Error Message	Diagnostic Steps / Causes	Solution
In the Siebel application, the Collaborate and Create Team Space buttons do not appear. In the Siebel application, the Team Space column does not appear.	■ Siebel Collaboration is not enabled in the Siebel application CFG file. ■ License key for Siebel Collaboration has not been entered. ■ The Internet Explorer browser cache needs to be cleared. ■ User authentication is not set correctly.	■ Confirm that the parameter CollaborationEnabled is set to TRUE in application CFG file. (See "Editing the Siebel Application CFG File for Siebel Collaboration" on page 14.) ■ Confirm that the license key for Collaboration has been installed. (See *Siebel Applications Administration Guide*.) ■ Clear the Internet Explorer cache. Delete cached files, all offline content, and objects. ■ Confirm that UserAuthentication is set to ADSI or SSO. If set to ADSI, then confirm that the [LDAPSecAdpt] section is configured correctly. (See "Editing the Siebel Application CFG File for Siebel Collaboration" on page 14.)
In the Siebel application, Collaborate and Team Space buttons are disabled. In the Siebel application, the Team Space column is empty (does not show any icons).	■ The Siebel Server is not configured correctly with the Siebel-SharePoint Integration Web Service. ■ The Siebel application cannot communicate with the Siebel-SharePoint Integration Web Service on the SharePoint host machine	■ Confirm the configuration for the Siebel-SharePoint Integration Web Service. See "Setting Up Inbound and Outbound Web Services for Siebel Collaboration" on page 18. ■ Confirm that IIS and the World Wide Web Publishing Service are running on the SharePoint host machine. ■ Confirm that the Siebel-SharePoint Integration Web Service is running. ■ Confirm that application CFG has been edited correctly; in particular, make sure that the SecurityToken in the CFG file matches the SecurityToken in the config.xml file. (See "Editing the Siebel Application CFG File for Siebel Collaboration" on page 14.)

Table 5. Troubleshooting the Siebel Collaboration Setup

Symptom / Error Message	Diagnostic Steps / Causes	Solution
In the Siebel application, when a user clicks Collaborate, the application displays the message, "Collaboration user ID cannot be located."	Siebel Collaboration has been configured for SSO user authentication and the user has not been added to the Siebel Server's SSO Team Space Collaboration record.	Add the user to the Team Space Collaboration record in the SSO Systems Administration list. (See "Setting Up the Single Sign-On Table for Siebel Collaboration" on page 16.)
In the Siebel application, when a user clicks Collaborate, a Windows login dialog box appears.	■ The user does not have access to the SharePoint host machine. ■ The SharePoint host machine has not be added to the browser as a local or trusted site with automatic logon.	■ Confirm that, external to the Siebel application, the user has login access to the SharePoint host machine. ■ Add the SharePoint host machine as a local or trusted site: a In Internet Explorer, navigate to Tools > Internet Options > Security. b Add the SharePoint host machine in either the Local intranet or Trusted sites zone. c For the security level of the zone, set the User Authentication > Logon setting to Automatic logon with current username and password.

Table 5. Troubleshooting the Siebel Collaboration Setup

Symptom / Error Message	Diagnostic Steps / Causes	Solution
In the Siebel application, when a user clicks Collaborate, the team site page displays an error page with the message, 'The "SiebelWebPart" Web Part appears to be causing a problem.'	The Siebel Web Part is incorrectly configured on the SharePoint server.	Confirm that the policy file for the SharePoint portal site is correctly configured.
The Siebel Web Part displays the message, "Web Part Error: A Web Part or Web Form Control on this Web Part Page cannot be displayed or imported because it is not registered on this site as safe."	The Siebel Web Part is incorrectly configured on the SharePoint server.	Confirm that Siebel Web Part has been registered as a safe control in the web.config file for the SharePoint portal site. This is located in the SharePoint Portal Server home directory.

Table 5. Troubleshooting the Siebel Collaboration Setup

Symptom / Error Message	Diagnostic Steps / Causes	Solution
The Siebel Web Part displays the message, "An Unexpected Error occurred."	The Siebel Web Part cannot communicate with the Siebel-SharePoint Integration Web Service.	■ Confirm that the Siebel-SharePoint Integration Web Service is running. ■ Confirm that the URI for the Siebel-SharePoint Integration Web Service is correctly specified in the registry. (See "Configuring the Collaboration Service" on page 18.)
The Siebel Web Part displays the message, "Unable to retrieve the Siebel data for this site."	■ The Siebel-SharePoint Integration Web Service cannot communicate with the Siebel inbound Web Service. ■ The Siebel-SharePoint Integration Web Service is not configured correctly.	■ Confirm that the correct URI for the Siebel inbound Web Service is specified in the config.xml file. (See "Configuring the Collaboration Service" on page 18.) ■ Confirm that the Siebel inbound Web Service is running. ■ Confirm that the correct values are specified in the registry settings through the WebParts.reg and IntegrationWebService.reg files; in particular, make sure that the names for the XSL files are correct. (See "Configuring the Collaboration Service" on page 18.)
The Siebel Web Part displays any other error message.	■ The Siebel Web Part is not configured correctly. ■ The Siebel-SharePoint Integration Web Service is not configured correctly. ■ The Siebel-SharePoint Integration Web Service cannot communicate with the Siebel inbound Web Service.	■ Check the Event Viewer (Application log) on the SharePoint server. ■ Confirm that the correct values are specified in the registry settings through the WebParts.reg and IntegrationWebService.reg files. (See "Configuring the Collaboration Service" on page 18.) ■ Confirm that the correct URI for the Siebel inbound Web Service is specified in the config.xml file. (See "Configuring the Collaboration Service" on page 18.) ■ Confirm that the Siebel inbound Web Service is running. (See "Setting Up Inbound and Outbound Web Services for Siebel Collaboration" on page 18.)

4 Using Siebel Collaboration

This chapter describes how the end user (such as a sales representative or a technical support engineer) uses Siebel Collaboration. It includes the following topics:

About Using Siebel Collaboration

Users create and access team spaces for individual opportunity and service request records.

About the Team Space Field

The Team Space field appears in the Opportunities and Service Request list views (Figure 2 on page 25).

Figure 2. Team Space Field in the Opportunities List View

The icon in the field indicates whether or not a team space exists for the record. The Icon field in Table 6 on page 26 describes the icons that appear in the Team Space field.

Table 6. The Team Space Field in the Opportunities and Service Requests List Views

Icon	Status Indicator
	No team space exists, or the team space is not available.
	A team space has been created or modified within the past day. This is an active-new team space.
	A team space has not been modified within the past 2-30 days. The team space is still considered to be active.
	A team space has not been modified for over 30 days. This is an inactive team space.

About the Membership List for the Team Space

There are several ways that users can become members of a team space:

- Users who belong to the sales team (opportunities) or account team (service requests) automatically become members when the team space is created.
- Other users become team space members when they click the Create Team Space or Collaborate buttons for the first time.
- Groups are named in the User Group entries in the Siebel-SharePoint Integration Web Service's config.xml file. Users are specified in the Siebel Application for that particular group.

Scenario for Using Siebel Collaboration

A sales representative is working on an opportunity. He receives an RFP (request for proposal) for the opportunity. The sales representative does not have the technical expertise to prepare the proposal himself. In fact, no single person in his company has all the answers. In order to successfully prepare the proposal, the sales representative needs the help of other company employees: some in the engineering department, others in the technical services center, and still others in his own sales force.

He creates a team space associated with the opportunity. The basic information about the opportunity (such as name, account, and description) appear in the team space. The other members of the sales team automatically become members of the team space. He adds, as members, other individuals in the company who he thinks can help him with the RFP.

The team space becomes the central repository for all information related to the RFP:

- Discussions give visibility and can capture ongoing conversation about the opportunity. Employees brought in midstream can read the discussions to update themselves about the status of the opportunity.

- The documents section is used for posting technical documents and for drafts of sections of the RFP; the document check-out process prevents shared files from being overwritten.
- The task list helps to make sure that tasks are completed on time.
- The online presence indicator allows the team to use instant messaging to collaborate.

The sales team accesses the team space from within their Siebel application. Others, such as the engineers, or non-Sales team members, who do not have access to the Siebel application, access the team space from their sites page—in the same way that they access their other SharePoint sites.

Process of Using Siebel Collaboration

To create and use team spaces for collaboration, perform the following tasks:

- "Creating Team Spaces" on page 27
- "Viewing Team Spaces Within the Siebel Application" on page 28
- "Viewing Team Spaces Without the Siebel Application" on page 28

Creating Team Spaces

Users can create team spaces associated with individual opportunity and service request records. Any user with visibility to the record can create a team space for the record.

Ownership of the team space is determined as follows:

- For opportunity records, the creator of the opportunity record becomes the owner of the team space.
- For service request records, the owner of the service request record becomes the owner of the team space.

This task is a step in "Process of Using Siebel Collaboration" on page 27.

To create a team space

1. Navigate to one of the following views:
   - Opportunities screen > List view
   - Service Requests screen > Service Request List view
2. Select a record where the Team Space field shows a grey icon.

   The grey icon indicates that a team space has not yet been created for the record.
3. Click Create Team Space.

   This action:
   - Creates a team space
   - Creates a membership list for the team space

- Sets the Team Space field to show a green icon

4 Click Collaborate.

This action opens the team space.

5 Use the SharePoint interface to create additional members, start discussion threads, post documents, and assign action items.

See the Microsoft Office SharePoint Help system for general information about how to use the SharePoint application.

Viewing Team Spaces Within the Siebel Application

Users with access to the Siebel application can navigate to team spaces through the Siebel UI. When users view opportunity or service request records, the Team Space field indicates if there is a team space associated with the record and if it has recently been updated.

To view a team space that is associated with a record

1 Navigate to one of the following views:

- Opportunities screen > List view
- Service Requests screen > Service Request List view

2 Select a record where the Team Space field shows a green icon.

The green icon indicates that a team space exists for the record.

3 Click Collaborate.

For more information, see Microsoft Office SharePoint application Help.

Viewing Team Spaces Without the Siebel Application

Users who do not have access to the Siebel application can access team spaces in the same way that they access their other SharePoint sites.

To view a team space without the Siebel application

1 Browse to the SharePoint portal site and navigate to the Sites page.

2 Click on the team space site.

5 Configuring Siebel Collaboration

This chapter describes how to configure Siebel Collaboration using Siebel Tools and the config.xml file. It includes the following topics:

About Configuring Siebel Collaboration

Both SharePoint and Siebel applications are highly configurable. Other chapters in this guide describe how to set up and use the pre-configured Siebel Collaboration. After, you are familiar with this preconfigured functionality, you can configure Siebel Collaboration to more exactly address your business needs.

To complete the tasks in this chapter, you must be proficient in both SharePoint and Siebel configuration is required to carry out the tasks in this chapter.

Scenario for Configuring Siebel Collaboration

A company is using Siebel Collaboration for opportunities. The IT group wants to make a variety of changes to the configuration to tailor the functionality to address the company's specific business needs.

The IT group decide to:

- Change the number of days that determine whether a team space is marked as new, active, or inactive.

- Change who is automatically added to the team space when the team space is created. They want to give a team from the finance and legal departments visibility to all team spaces created for opportunities.
- Change the appearance of some of the pages in response to user feedback.
- Edit the Siebel Web Part to include the anticipated close date for the opportunity. Improve the display performance of the Opportunities List view by implementing caching for the team space icon.
- Enable team spaces for accounts.
- Configure Siebel Collaboration for other languages so that it can be rolled out to the company's international offices where the Siebel application is localized.

Process of Configuring Siebel Collaboration

Depending on your business needs, you can pick and choose which of the following tasks you want to do.

To configure Siebel Collaboration, perform the following tasks:

- "Changing the Team Space Status" on page 30
- "Changing the Look and Feel of the Team Space Pages" on page 31
- "Hiding and Showing the Navigation Bars on Team Space Pages" on page 32
- "Configuring the Siebel Web Part for Team Spaces" on page 35
- "Configuring Membership Lists for Team Spaces" on page 37
- "Changing the Cache Setting for Siebel Collaboration" on page 39
- "Extending Siebel Collaboration for Additional Siebel Objects" on page 40
- "Configuring Siebel Collaboration for Another Language" on page 47

If you make configuration changes to files or registry settings on the SharePoint server, restart Internet Information Services (IIS) for the changes to take effect.

Changing the Team Space Status

The color of the icon in the Team Space field in the Opportunity and Service Request list views indicates:

- Whether or not a team space exists for the record
- And, if a team space does exist, how recently it has been modified

For general information about the Team Space field, see "About Using Siebel Collaboration" on page 25.

This task is a step in "Process of Configuring Siebel Collaboration" on page 30.

To configure the number of days that determine the team space status

1. Open the config.xml file in the *Siebel-SharePoint Integration*\config directory.

   For example, *C:**Siebel**SharePointIntegration*\config\config.xml

2. Locate the Object Type element for the object you want to configure: for example, Opportunity or Service Request.

3. Edit the ActiveDays and ActiveNewDays attributes for the object.

   For example, if you edit the Service Request object as follows (setting ActiveDays to 45 and ActiveNewDays to 2), then team spaces are indicated as active-new if they have been created or updated within the last two days. Team spaces are indicated as inactive if they have not been updated within the last 45 days.

```
<ObjectTypes>
  <ObjectType Type="Service Request" SitePrefix="SR" SiteTemplate="SIEBEL#0"
SiteTheme="SIEBEL" ActiveDays="45" ActiveNewDays="2" UserRole="Contributor">
```

Changing the Look and Feel of the Team Space Pages

You can change the look and feel of the team space pages by editing the Siebel site definition and theme files in the same way that you edit site definition and theme files for other SharePoint sites.

This task is a step in "Process of Configuring Siebel Collaboration" on page 30.

To change the look and feel of the team space

1. Edit the Siebel site definition files in the *SharePoint Services Web Service Extension Directory*, *C:**Program Files**Common Files**Microsoft Shared**web server extensions**60*\TEMPLATE\1033 directory.

2. Edit the Siebel theme files in the *SharePoint Services Web Service Extension Directory*, *C:**Program Files**Common Files**Microsoft Shared**web server extensions**60*\TEMPLATE\THEMES directory.

Hiding and Showing the Navigation Bars on Team Space Pages

ASPX pages in the Siebel site definition are modified so that when a page is viewed from within the Siebel application, those menu items that normally appear in the SharePoint top navigation bar appear in the left navigation bar. (See Figure 3 on page 32 and Figure 4 on page 33.) This is to make better use of the window height within the Siebel application.

NOTE: The Siebel left navigation bar does not appear in the team space home page.

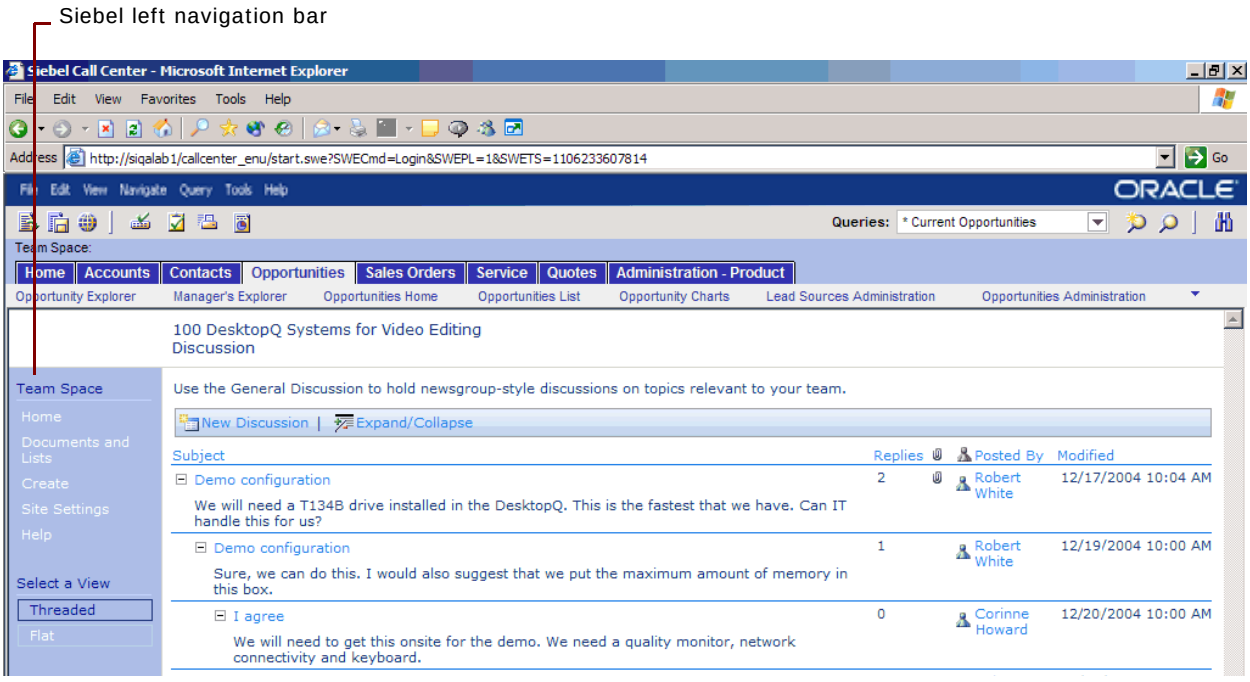

Figure 3. Sample Page Displayed Within the Siebel Application

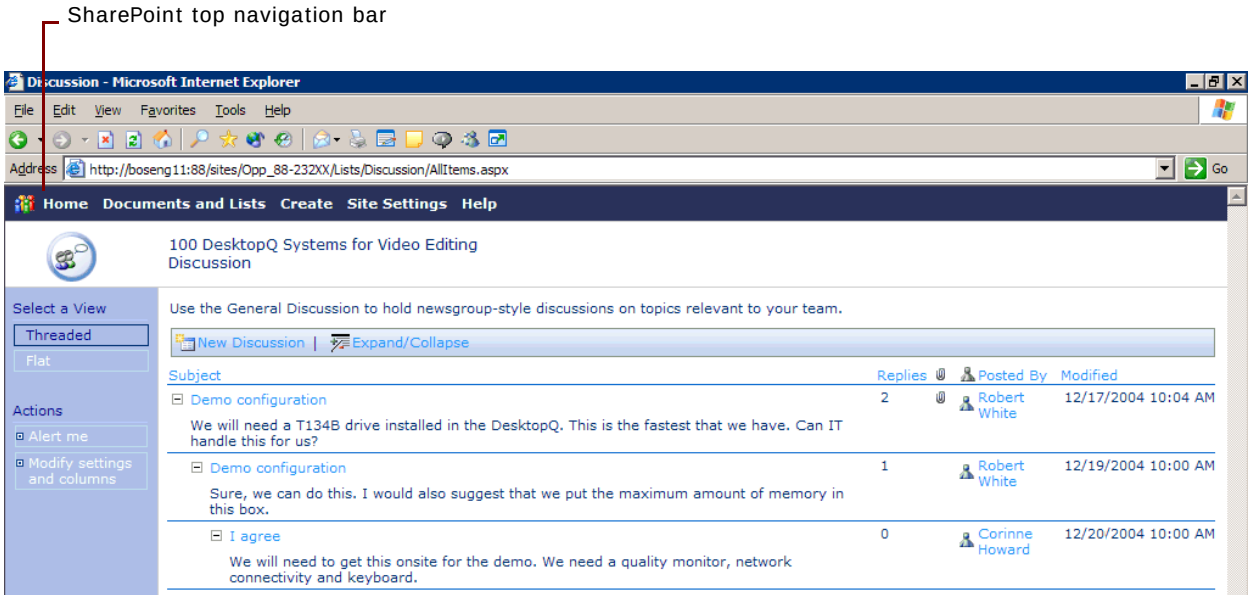

Figure 4. Sample Page Displayed from SharePoint Application

These navigation bar modifications were only made to the ASPX pages within the Siebel site definition. If you want to apply navigation bar modifications for pages in the LAYOUTS directory, to hide the SharePoint top navigation bar within the Siebel application, see the following procedure.

CAUTION: Pages in the LAYOUTS directory are not part of the Siebel site definition. Any changes to these pages may be lost when updates, Service Packs, or version upgrades are applied to the SharePoint installation. Before you edit these pages, refer to the SharePoint documentation for general information about making changes to pages in the LAYOUTS directory.

For information about making navigation bar modifications to ASPX pages in the LISTS directory of the Siebel site definition, see "Configuring Siebel Collaboration for Another Language" on page 47.

This task is a step in "Process of Configuring Siebel Collaboration" on page 30.

To hide the SharePoint top navigation bar for pages displayed in the Siebel application

1. Open the ASPX file (contained in a subdirectory of the *SharePoint Services Web Service Extension Directory*\Template\LAYOUTS directory).
2. Wrap this pair of tags around the Web Part for the SharePoint top navigation bar:

`<SIEBEL:HideDataInSiebelApp runat=server> . . . </SIEBEL:HideDataInSiebelApp>`

The SharePoint top navigation bar Web Part is coded differently in different SharePoint templates. The following table describes patterns the template may contain. If the templates contain these patterns, you must wrap the corresponding <SIEBEL ... tag around this set of tags in the file as described in the following table.

Pattern	Action
Template contains the pattern `SPSWC:CategoryNavigationWebPart`	Wrap the corresponding <SIEBEL ... tag around this set of tags in the file `<SPSWC:TopPageSection . . . </SPSWC:TopPageSection>` For example: **<SIEBEL:HideDataInSiebelApp runat=server>**<SPSWC:TopPageSection runat="server"> <SPSWC:PageHeader id="PageHeader" runat="server" TitleLocId="AudienceAdminMain_PageTitle_Text" HelpID="ManageAudiences" /> <SPSWC:CategoryNavigationWebPart runat="server" id="HorizontalNavBar" DisplayStyle="HorizontalOneLayer" /> </SPSWC:TopPageSection> **</SIEBEL:HideDataInSiebelApp>**
Contains the Web Part called `SPSWC:CategoryNavigationWebPart`	`<SPSWC:TopPageSection . . . </SPSWC:TopPageSection>` For example: **<SIEBEL:HideDataInSiebelApp runat=server>**<SPSWC:TopPageSection runat="server"> <SPSWC:PageHeader id="PageHeader" runat="server" ... </SPSWC:TopPageSection> **</SIEBEL:HideDataInSiebelApp>**

Contains the pattern
 	
`SharePoint:PortalConnection`
	`<tr> ... </tr>` found after the text “AlternateHeader”
	
	For example:
	
	if (alternateHeader == null || alternateHeader == "")
	{
	%>
	<SIEBEL:HideDataInSiebelApp runat=server>
	<TR>
	<TD COLSPAN=3 WIDTH=100%> <!--Top bar--> <table class="ms-bannerframe" border="0" cellspacing="0" cellpadding="0" width="100%"> <tr> <td nowrap valign="middle"><img ID=onetidHeadbnnr0 alt="Logo" src="/_layouts/images/logo.gif"> </td>
	<td class=ms-banner width=99% nowrap ID="HBN100" valign="middle"> <!--webbot Bot="Navigation" startspan--> <SharePoint:Navigation LinkBarId="1002" runat="server"/> </td>
	<td class=ms-banner> </td>
	<td nowrap class=ms-banner style="padding-right: 7px">
	<SharePoint:PortalConnection runat="server" /> </td>
	</tr></table></TD>
	</TR>
	</SIEBEL:HideDataInSiebelApp>

Pattern	Action
is layouts/1033/ PortalHeader.aspx	<SPSWC:CategoryNavigationWebPart . . . </SPSWC:CategoryNavigationWebPart>
is layouts/1033/ QuickLinks.aspx	<SPSWC:PersonalSpaceNavigation HelpID="MySite" runat="server"/>

TIP: You can use these <SIEBEL... tags to configure other HTML to only appear when the page is viewed directly in the SharePoint application.

Configuring the Siebel Web Part for Team Spaces

There are two kinds of changes that you can make to the Siebel Web Part. You can change:

- Which fields from the opportunity or service request records are displayed in the team spaces
- The layout and formatting of the Siebel Web Part

The ObjectType element in the config.xml file determines which fields from the object's business component can appear in the Siebel Web Part.

The siebelSR.xsl and siebelOpp.xsl files determine the layout and formatting of the service request data and the opportunity data in the Siebel Web Part. (The colors and fonts come from CSS style sheets referenced in the ASPX pages.) After you add or delete fields from the config.xml file, you need to make the corresponding changes to the XSL file; each field must be referenced in both files, otherwise they do not appear in the Siebel Web Part.

This task is a step in "Process of Configuring Siebel Collaboration" on page 30.

To add or delete fields from the Siebel Web Part

1. Open the config.xml file in the `Siebel-SharePoint Integration\config` directory.

   For example, `C:\Siebel\SharePointIntegration\config\config.xml`

2. Locate the ObjectType element for the Web Part object you want to change (Opportunity or Service Request).

3. Add or delete Field elements as necessary. When you add a field, the name of the field must match the name of the field in the business component.

   For example, to add the Area field and delete the Account field from the Service Request Web Part, edit the config.xml file by adding the bold text and deleting the italic text from the Service Request object.

```
<ObjectType Type="Service Request" SitePrefix="SR" SiteTemplate="SIEBEL#0" SiteTheme="SIEBEL"
ActiveDays="30" ActiveNewDays="1" UserRole="Contributor">
   <Name>
   <LocaleText lcid="1033" text="Service Request" />
   </Name>
   <SiteGroup Role="Contributor">
   <LocaleText lcid="1033" text="Siebel Users" />
   </SiteGroup>
   <UserGroups>
      <UserGroup Role="Administrator">
      <User Login="CHANGE_ME (or delete user groups element)" />
      </UserGroup>
   </UserGroups>
   <Fields>
      <Field name="SR Number">
         <LocaleText lcid="1033" text="Service Request #" />
      </Field>
      <Field name="Abstract">
         <LocaleText lcid="1033" text="Summary" />
      </Field>
      <Field name="Description">
         <LocaleText lcid="1033" text="Description" />
      </Field>
      <Field name="Account">
         <LocaleText lcid="1033" text="Account" />
      </Field>
      <Field name="Area">
         <LocaleText lcid="1033" text="SR Area" />
      </Field>
      <Field name="Status">
         <LocaleText lcid="1033" text="Status" />
      </Field>
   </Fields>
</ObjectType>
```

4 Open the XSL file corresponding to the object you are modifying.

For example, for the service request object, open the file `C:\Siebel\SharePointIntegration\config\SiebelSR.xsl`

5 Add or delete Field elements as necessary to match the changes you made in Step 3.

For example,

```
<xsl:template match="/SiebelCollaboration/FieldList">
   <xsl:apply-templates select="Field[@Name='SR Number']" />
   <xsl:apply-templates select="Field[@Name='Abstract']" />
   <xsl:apply-templates select="Field[@Name='Description']" />
   <xsl:apply-templates select="Field[@Name='Status']" />
   <xsl:apply-templates select="Field[@Name='Area']" />
   <xsl:apply-templates select="Field[@Name='Account']" />
</xsl:template>
```

To edit the formatting and layout in the Siebel Web Part

1 Open the XSL file for the Siebel Web Part in the *Siebel-SharePoint Integration*\config directory.

For example, `C:\Siebel\SharePointIntegration\config\SiebelSR.xsl`

2 Edit the file; use standard XSL syntax to modify the XSL file.

The XML that the XSL manipulates has the following format:

```
<SiebelCollaboration>
  <FieldList>
     <Field Name="Area">
        <Value>Help Desk<Value>
        <Caption>SR Area</Caption>
     </Field>
     <Field Name="Abstract">
        <Value>Printer isn't working<Value>
        <Caption>Summary</Caption>
     </Field>
     <Field>
  . . .
</SiebelCollaboration>
```

Configuring Membership Lists for Team Spaces

There are two areas where you can configure who becomes a member of the team spaces:

- The config.xml file.

  You can edit this file to change which users are added each time a team space is created and to determine what rights users have (for example, Reader, Contributor, Administrator).

- Siebel Tools.

  The CollaborationField:Owner user property on the Opportunity and Service Request business components determines which Siebel user becomes the team space's owner.

  The business components called Opportunity Teamspace Members and Service Request Teamspace Members represent the Siebel users who become members when the team space is created: you can create new business components that return different lists of Siebel users, and substitute your new business components for the Opportunity Teamspace Members and Service Request Teamspace Members business components supplied.

This task is a step in "Process of Configuring Siebel Collaboration" on page 30.

To edit the config.xml file to configure team space membership

1. Open the file config.xml in the `Siebel-SharePoint Integration\config` directory.

   For example, *`C:\Siebel\SharePointIntegration`*`\config\config.xml`

2. Edit UserGroup elements and UserRole elements as required.

   - For example, the text added here in bold gives Reader rights to the Finance user group for all team spaces created for opportunity records.

     ```
     <ObjectType Type="Opportunity" SitePrefix="SR" SiteTemplate="SIEBEL#0"
     SiteTheme="SIEBEL" ActiveDays="30" ActiveNewDays="1" UserRole="Contributor">
     . . .
      <UserGroups>
         <UserGroup Role="Administrator">
            <User Login="OpptyAdmin"/>
         </UserGroup>
         <UserGroup Role="Reader">
     ```

```
      <User Login="FinsGroup"/>
    </UserGroup>
  </UserGroups>
```

- For example, the text edited here in bold gives Web Designer rights to new owners of team spaces based on service requests.

  ```
  <ObjectType Type="Service Request" SitePrefix="SR" SiteTemplate="SIEBEL#0"
  SiteTheme="SIEBEL" ActiveDays="30" ActiveNewDays="1" UserRole="Web Designer">
  ```

Related Topic

"Configuring the Collaboration Service" on page 18

To change which Siebel user becomes the owner of team space upon creation

1. Locate one of the following business components:
   - Opportunity
   - Service Request
2. Edit the CollaborationField:Owner user property.

   Change the value of the user property to the name of the field that contains a Siebel user. This field determines which Siebel user becomes the owner when a new team space is created.

To change which Siebel users become members of new team spaces

1. Locate one of the following business components:
   - Opportunity Teamspace Members
   - Service Request Teamspace Members

   These business components represent the Siebel users who automatically become members of the team space. In the preconfigured application, this is the sales team or account team members.

2 Replace the business component with a new business component that you create yourself and which returns the list of Siebel users that you want to automatically become members of the team space.

Make the name of the new business component the same as the original business component (*Object Type* Teamspace Members) that you are replacing.

Make sure that your business component contains these fields:

Field	Comments
Login	The LOGIN column from the S_USER table, representing the users who are to be added as team space members.
Object Id	The row ID of the primary business component (the object for which the team space is being created).

Changing the Cache Setting for Siebel Collaboration

The CFG files contain configuration settings for caching the team space status on Siebel Server.

You can improve display performance for your Siebel application by setting up caching for the team space icons. Without caching, each time the list applet containing the Team Space field is rendered, the Siebel application has to query the SharePoint Portal Server to determine the status of each team space. Caching the team space status makes subsequent pages display faster.

To set up caching for Siebel Collaboration

1 Open the CFG file for the application and, if the file does not already contain a [Collaboration Teamspace Existence Cache] section, add this one:

```
;; This section is for collaboration teamspace existence cache parameters
[Collaboration Teamspace Existence Cache]
MaxItems                    = 1000
ItemTimeout                 = 300

;; Object specific unique cache identifier
Opportunity Cache Key       = OP
Service Request Cache Key   = SR
```

2 Edit the [Collaboration] section if necessary.

The parameters are described in the following table.

Parameter	Comments
MaxItems	Determines the number of team-space icon existence states that can be cached in a user session.
ItemTimeout	The cache is invalidated after this many seconds.
Opportunity Request Cache Key	This key is used as a cache key for object Opportunity.
Service Request Cache Key	This key is used as a cache key for object Service Request.

3 If you have extended Siebel Collaboration for additional Siebel objects, such as accounts, add a unique cache key parameter to the section.

Keep this string short (two letters), for example:

```
Account Cache Key  = AC
```

Extending Siebel Collaboration for Additional Siebel Objects

In the preconfigured Siebel application, Siebel Collaboration is enabled for the Opportunity and the Service Request objects. You can configure other Siebel objects to be enabled for Siebel Collaboration.

The final result is:

- A new Collaboration business object which contains two business components.

  The primary business component represents the Siebel object that you want to configure (for example, Account). The second component is the team space business component. This represents the Siebel users who automatically become members of a new team space.

  NOTE: You can omit this business component. Without this business component, the team space owner is the only Siebel user automatically made a member of the team space. The owner then invites the other members.

- A new view and applet setup to display the team space within the Siebel application.
- On the SharePoint side, an updated config.xml file and a new XSL file configured to include the new object.

Object Requirements

Only business objects that meet these requirements can be enabled for Siebel Collaboration:

- The primary business component must use the class CSSBCBase or a class derived from CSSBCBase
- The applet used must:
  - Be a list applet
  - Use the class CSSFrameList or a class derived from the CSSFrameList class

Two Part Task

This task is a step in"Process of Configuring Siebel Collaboration" on page 30. It involves two procedures:

- The first procedure is carried out in Siebel Tools. (See "Extending Siebel Collaboration in Siebel Tools" on page 41.)
- The second procedure is carried out on the SharePoint server. (See "SharePoint Procedure" on page 45.)

Extending Siebel Collaboration in Siebel Tools

This procedure outlines the steps you carry out in Siebel Tools. Throughout this procedure, the example is enabling accounts for Siebel Collaboration.

TIP: Review the Opportunity or Service Request configuration, and use it as a guide as you extend Siebel Collaboration for other objects.

To extend Siebel Collaboration to other Siebel objects: Siebel Tools part

1. Identify the business component and the applet that you want to configure, making sure that the preceding requirements are met.

   For example, the Account business component is based on the CSSBCBase class and the Account List Applet is based on the CSSFrameList class.

2. Add these three fields to the primary business component.

Name	Calculated	Calculated Value	Comments
TeamspaceExistenceState	TRUE	TeamspaceNone	This calculated field has possible values of TeamspaceActive, TeamspaceInactive, TeamspaceNone, and TeamspaceActiveNew.
TeamspaceSymbolicURL	TRUE	"Collaboration Teamspace"	This calculated field indicates the symbolic URL for the team space.
TeamspaceObjectType	TRUE	"*Abbreviation of Object Type*" For example, "Acc"	This text is added to the team space's URL to indicate what kind of object the team space is based on. This text should be the same as the SitePrefix you enter in Step 2 on page 45.

3 Add these three user properties to the primary business component:

User Property Name	Value	Comments
CollaborationField:Description	*A description field* For example, Description	This field indicates the business component field that provides the description for the site.
CollaborationField:Owner	*A user login field* For example, Primary Employee Login	This field indicates the business component field representing owner for the team space.
CollaborationField:Title	*Object name* For example, Name	This field indicates the business component field that provides the title for the team space.

4 Configure the list applet (for example, the Account List Applet) by adding the column that displays the team space icon and the buttons for Collaborate and Create Team Space:

a Add the following column to the list applet.

Attribute	Value
Name	TeamspaceExistenceState
Field	TeamspaceExistenceState
Available	TRUE
Display Name	Team Space
Display Name - String Reference	SBL_COLLABORATION_TEAM_SPACE_HOR
HTML Display Mode	EncodeData
HTML Icon Map	TeamspaceState
HTML List Edit	TRUE
HTML Row Sensitive	TRUE
HTML Type	ImageButton
Read Only	TRUE
Text Alignment	Left
Show in List	TRUE
Width	20
Text Alignment-Label	Right

b Add this column to the list applet's Edit List template.

c Add the following two controls to the list applet:

Attribute	Value for Control 1	Value for Control 2
Name	CreateTeamSpace	Collaborate
Caption	Create Team Space	Collaborate
Caption - String Reference	SBL_COLLABORATION_CREATE_TEAM_SPACE_HOR	SBL_COLLABORATE-1004224858-039
Height	10	10
HTML Display Mode	DontEncodeData	DontEncodeData
HTML Only	TRUE	TRUE
HTML Type	MiniButton	MiniButton
Method Invoked	CreateTeamSpace	Collaboration
Text Alignment	Left	Left
Visible	TRUE	TRUE

d Add the two controls to the toolbar on the list applet's Edit List template.

e Add following applet user properties to the list applet.

User Property Name	Value	Comments
CollaborationView	*Object* Teamspace View For example, Account Teamspace View	This is the view used for collaboration. See Step 8 on page 44.
CollaborationApplet	*Object* Teamspace Applet For example, Account Teamspace Applet	This is the applet used to support the symbolic URL for the team space. See Step 6 on page 44.

5 (Optional) If you want to have some users (in addition to the team space's owner) automatically become members of newly created team space, then create the Teamspace Members business component as follows:

a Identify which users you want to have added as members when a team space is created.

b Create a business component that represents these users and name it *Object* Teamspace Members.

Make sure that your business component contains these fields:

Field	Comments
Login	The LOGIN column from the S_USER table, representing the users who are to be added as team space members.
Object Id	The row ID of the primary business component (the object for which the team space is being created).

For example, create a business component called Account Teamspace Members that represents the account team.

c Create a link between the new *Object* Teamspace Members business component and your primary business component.

For example, create a link between the Account Teamspace Members business component and the Account business component as follows:

Attribute Name	Value
Name	Account/Account Teamspace Members
Parent Business Component	Account
Child Business Component	Account Teamspace Members
Source Field	*Leave blank*
Destination Field	Object Id
Cascade Delete	None

6 Create the applet to display the team space:

a Copy the Service Request Teamspace Applet and rename it *Object* Teamspace Applet (for example, Account Teamspace Applet).

b Change the Business Component property from Service Request to *Object* (for example, Account).

7 Create and configure the Collaboration business object:

a Create a new business object and name it Collaboration *Object*, for example, Collaboration Account.

b Add the primary business component, for example Account. Make sure to indicate that this is the primary business component for the object.

c (Optional) Add the Teamspace Members business component, for example Account Teamspace Members.

8 Create and configure the collaboration view; this is the view that will contain the Teamspace Applet that you created in Step 6 on page 44:

a Copy the Service Request Teamspace View and rename it *Object* Teamspace View, for example Account Teamspace View.

b Change its Business Object property from Service Request to *Object*, for example, Account.

c Change the properties for the view web template item as follows:

Attribute	Value
Name	*Object* Teamspace Applet For example, Account Teamspace Applet
Applet	*Object* Teamspace Applet

d change the Visibility Applet attribute for the view to *Object* Teamspace Applet, for example Account Teamspace Applet.

e Add the *Object* Teamspace View in the required screen as an Aggregate View type with an appropriate sequence number; set Display In Page and Display In Site Map to FALSE.

(Do not specify any labels or parent category.)

f Add this view to the appropriate responsibilities.

Related Topic

"Configuring Membership Lists for Team Spaces" on page 37

SharePoint Procedure

Complete the steps in the following procedure to edit the config.xml file, XSL file in the SharePoint Portal Server, and registry to accommodate a new object. Throughout this procedure, the example enables accounts for Siebel Collaboration.

TIP: Review the Opportunity or Service Request configuration, and use it as a guide as you extend Siebel Collaboration for other objects.

To extend Siebel Collaboration to other Siebel objects: SharePoint part

1 Open the file config.xml in the `Siebel-SharePoint Integration\config` directory.

For example, *`C:\Siebel\SharePointIntegration`*`\config\config.xml`

2 Add a new ObjectType element the ObjectTypes element to describe your new object. Make sure that you:

- Create a field element for each of the data fields that you want to display in the Siebel Web Part.

- Set the SitePrefix to the same text that you entered for TeamspaceObjectType in Step 2 on page 41.

TIP: Copy and edit one of the existing ObjectType elements in the file.

For example, an ObjectType for accounts:

```
<ObjectType
  Type="Account"
  SitePrefix="Acc"
  SiteTemplate="SIEBEL#0"
  ActiveNewDays="0"
  ActiveDays="30"
  UserRole="Contributor">

  <Name>
    <LocaleText lcid="1033" text="Account"/>
  </Name>

  <SiteGroup Role="Contributor">
    <LocaleText lcid="1033" text="Siebel Users"/>
  </SiteGroup>

  <Fields>
    <Field name="Id">
      <LocaleText lcid="1033" text="Account #'"/>
    </Field>
    <Field name="Name">
      <LocaleText lcid="1033" text="Name"/>
    </Field>
    <Field name="Type">
      <LocaleText lcid="1033" text="Type"/>
    </Field>
    <Field name="Account Status">
      <LocaleText lcid="1033" text="Account Status"/>
    </Field>
    <Field name="Description">
      <LocaleText lcid="1033" text="Description"/>
    </Field>
  </Fields>
</ObjectType>
```

3 Create a new XSL file for the object:

a Copy the SiebelSR.xsl file and rename it Siebel*Object*.xsl, for example, SiebelAccount.xsl.

Locate the SiebelSR.xsl file in the *Siebel-SharePoint Integration*\config directory. (For example, *C:\Siebel\SharePointIntegration*\config\SiebelSR.xsl)

b Modify the <xsl:template match="/SiebelCollaboration/FieldList" > section of the new XSL file to reference the data fields that you added in Step 2 on page 45.

For example, a template for accounts looks like this:

```
<xsl:template match="/SiebelCollaboration/FieldList" >
<xsl:apply-templates select="Field[@Name='Id']"  />
    <xsl:apply-templates select="Field[@Name='Name']"  />
    <xsl:apply-templates select="Field[@Name='Type']" />
    <xsl:apply-templates select="Field[@Name='Account Status']"  />
    <xsl:apply-templates select="Field[@Name='Description']" />
</xsl:template>
```

NOTE: The @Name value is the name of the field used by the business component.

4 Create and run a registry entry to specify the location of the new Siebel*Object*.xsl file:

a Create a new string type registry entry file.

TIP: Copy and edit the WebParts.reg (in the *Siebel-SharePoint Integration directory*\config directory).

The registry entry must be named *ObjectType* XSL File, where *ObjectType* is the Type attribute in the ObjectType element of the config.xml file.

For example, for accounts, the registry entry looks like this:

```
[HKEY_LOCAL_MACHINE\SOFTWARE\Siebel Systems, Inc.\Collaboration\Sharepoint]
"Account XSL File"="C:\\Siebel\SharePointIntegration\\config\\SiebelAccount.xsl"
```

b Execute the registry file.

Related Topics

"Configuring the Siebel Web Part for Team Spaces" on page 35

"Configuring the Collaboration Service" on page 18

Configuring Siebel Collaboration for Another Language

In the preconfigured application, Siebel Collaboration is configured for U.S. English (ENU). After you have set up the Siebel site definition for ENU as described in Chapter 3, "Getting Started with Siebel Collaboration," you can configure the Siebel site definition for other languages.

The following procedure provides some information about configuring Siebel Collaboration for other languages. The steps involve:

- Downloading the SharePoint language pack for the new language from Microsoft
- Copying the STS site definition that is provided in the language pack
- Customizing the copied site definition to be the Siebel site definition in the new language
- Adding elements for the new language to the config.xml file

This task is a step in "Process of Configuring Siebel Collaboration" on page 30.

To configure Siebel Collaboration in another language

1 Create the base Siebel site definition in the new language:

a Download and install the Microsoft Windows SharePoint Services Language Template Pack for the new language.

http://www.microsoft.com/downloads/details.aspx?FamilyID=E7EEC77D-4365-4B66-8E8D-9D079C509679&displaylang=en

The installer places the new language template pack in a folder called *SharePoint Services Web Service Extension Directory*\Template*lcid* (where *lcid* is the language identifier (ID) associated with the language). For example, *C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\60*\Template\1036

b Make a copy of the STS directory and rename it SIEBEL. (Use all capital letters to name the folder.)

- Source: *SharePoint Services Web Service Extension Directory*\Template*lcid*\STS
- Destination: *SharePoint Services Web Service Extension Directory*\Template*lcid*\SIEBEL

c Copy the file WEBTEMPSIEBEL.xml:

- From the *SharePoint Services Web Service Extension Directory*\TEMPLATE\1033\XML directory
- To the *SharePoint Services Web Service Extension Directory*\TEMPLATE*lcid*\XML directory

d Copy the file default.aspx:

- From the *SharePoint Services Web Service Extension Directory*\TEMPLATE\1033\SIEBEL directory
- To the *SharePoint Services Web Service Extension Directory*\TEMPLATE*lcid*\SIEBEL directory

2 Localize the default.aspx file (copied from the Siebel ENU site definition) by replacing lines from the default.aspx file in the *lcid* STS site definition:

Edit the file default.aspx, which is in the *SharePoint Services Web Service Extension Directory*\TEMPLATE*lcid*\SIEBEL directory, by copying lines from the version of the default.aspx that is in the STS directory (*SharePoint Services Web Service Extension Directory*\Template*lcid*\STS) and pasting them into the default.aspx file in the SIEBEL directory.

The following table describes the values to replace and also provides an example value.

Value	Example
Locale id	<!-- _lcid="1033" _version="11.0.5510" _dal="1" -->
html element	<html dir="ltr" xmlns:v="urn:schemas-microsoft-com:vml" xmlns:o="urn:schemas-microsoft-com:office:office">

Value	Example
Title element	<Title ID=onetidTitle>Home - <SharePoint:ProjectProperty Property="Title" runat="server"/></Title>
TD element that contains the logo	<td nowrap valign="middle"><img ID=onetidHeadbnnr0 alt="Logo" src="/_layouts/images/dws.gif"></td>
tr element that contains the HTML for displaying the site name.	<!-- Title --> <tr> <td colspan=3 class="ms-titleareaframe"> …

3 Edit the file WEBTEMPSIEBEL.XML, which is in *SharePoint Services Web Service Extension Directory*\TEMPLATE*lcid*\XML directory:

- For each of the Configuration elements, translate the strings in the Title and Description attributes.

4 Edit the file ONET.XML, which is in the *SharePoint Services Web Service Extension Directory*\TEMPLATE*lcid*\SIEBEL\XML directory:

TIP: For Step a, Step c, and Step e, you can also copy the text from the ONET.XML file for the U.S. English site definition (*SharePoint Services Web Service Extension Directory*\TEMPLATE\1033\SIEBEL\XML\ONET.XML).

a Add the following text into the NavBars element in the NavBars section (this text defines the Siebel navigation bar):

```
<NavBar Name="Siebel Navbar" Prefix="&lt;TABLE style='padding-top: 8px' class=ms-
navframe CELLPADDING=0 CELLSPACING=0 BORDER=0 width=100%&gt; &lt;TR&gt; &lt;TD
valign=top width=4px&gt;&lt;IMG SRC='/_layouts/images/blank.gif' width=1
height=1 alt=''&gt;&lt;/TD&gt; &lt;TD valign=top class=ms-viewselect&gt;
&lt;TABLE style='margin-left: 3px' width=115px cellpadding=0 cellspacing=2
BORDER=0&gt; &lt;TR&gt;&lt;TD width=100%&gt;Team Space&lt;/TD&gt;&lt;/TR&gt;
&lt;TR&gt;&lt;TD class='ms-navline'&gt;&lt;IMG SRC='/_layouts/images/blank.gif'
width=1 height=1 alt=''&gt;&lt;/TD&gt;&lt;/TR&gt; &lt;/TABLE&gt; &lt;table
border=0 cellpadding=4 cellspacing=0&gt;"
    Body="&lt;tr&gt;&lt;td&gt;&lt;table border=0 cellpadding=0
cellspacing=0&gt;&lt;tr&gt;&lt;td&gt;&lt;img src='/_layouts/images/blank.gif'
ID='100' alt='Icon' border=0&gt;&amp;nbsp;&lt;/td&gt;&lt;td valign=top&gt;&lt;a
ID=onetleftnavbar#LABEL_ID# href='#URL#'&gt;#LABEL#&lt;/td&gt;&lt;/tr&gt;&lt;/
table&gt;&lt;/td&gt;&lt;/tr&gt;"
    Suffix="&lt;/table&gt; &amp;nbsp;&lt;/TD&gt;&lt;TD style='padding-right:
2px;' class=ms-verticaldots&gt;&amp;nbsp;&lt;/TD&gt;&lt;/TR&gt;&lt;/TABLE&gt;"
ID="1012">
    <NavBarLink Name="Home" Url="default.aspx"> </NavBarLink>
    <NavBarLink Name="Documents and Lists" Url="_layouts/
[%=System.Threading.Thread.CurrentThread.CurrentUICulture.LCID%]/
viewlsts.aspx">  </NavBarLink>
    <NavBarLink Name="Create" Url="_layouts/
[%=System.Threading.Thread.CurrentThread.CurrentUICulture.LCID%]/create.aspx">
</NavBarLink>
    <NavBarLink Name="Site Settings" Url="_layouts/
[%=System.Threading.Thread.CurrentThread.CurrentUICulture.LCID%]/
settings.aspx">  </NavBarLink>
```

```
    <NavBarLink Name="Help" Url='javascript:HelpWindowKey("NavBarHelpHome")'>
</NavBarLink>
    </NavBar>
```

b In the Configurations element, remove all Configuration elements except for the one Configuration element where ID=-1.

c Add the following text to the Configurations element, add the text after the one Configuration element that you did not remove in Step b.

```
<Configuration ID="0" Name="Opportunity">
    <Lists>
       <List Title="Document Library" Type="101" />
       <List Title="Discussion"
          Url="Lists/Discussion"
          QuickLaunchUrl="Lists/Discussion/AllItems.aspx"
          Type="108" />
       <List Title="Announcements" Type="104"
          Url="Lists/Announcements" />
       <List Title="Contacts"
          Url="Lists/Contacts"
          QuickLaunchUrl="Lists/Contacts/AllItems.aspx"
          Type="105" />
       <List Title="Links" Type="103"
          Url="Lists/Links" />
       <List Title="Events"
          Url="Lists/Events"
          QuickLaunchUrl="Lists/Events/AllItems.aspx"
          Type="106" />
       <List Title="Action Items" Type="107" />
       <List Title="Site Template Gallery"
          Type="111"
          Url="_catalogs/wt"
          RootWebOnly="TRUE" />
       <List Title="Web Part Gallery"
          Type="113"
          Url="_catalogs/wp"
          RootWebOnly="TRUE" />
       <List Title="List Template Gallery"
          Type="114"
          Url="_catalogs/lt"
          RootWebOnly="TRUE" />
    </Lists>
    <Modules>
       <Module Name="SiebelTeamspace"/>
       <Module Name="WebPartPopulation"/>
    </Modules>
 </Configuration>
 <Configuration ID="1" Name="Service Request">
    <Lists>
       <List Title="Document Library" Type="101" />
       <List Title="Discussion"
          Url="Lists/Discussion"
          QuickLaunchUrl="Lists/Discussion/AllItems.aspx"
          Type="108" />
```

```
            <List Title="Announcements" Type="104"
               Url="Lists/Announcements" />
            <List Title="Contacts"
               Url="Lists/Contacts"
               QuickLaunchUrl="Lists/Contacts/AllItems.aspx"
               Type="105" />
            <List Title="Links" Type="103"
               Url="Lists/Links" />
            <List Title="Events"
               Url="Lists/Events"
               QuickLaunchUrl="Lists/Events/AllItems.aspx"
               Type="106" />
            <List Title="Action Items" Type="107" />
            <List Title="Site Template Gallery"
               Type="111"
               Url="_catalogs/wt"
               RootWebOnly="TRUE" />
            <List Title="Web Part Gallery"
               Type="113"
               Url="_catalogs/wp"
               RootWebOnly="TRUE" />
            <List Title="List Template Gallery"
               Type="114"
               Url="_catalogs/lt"
               RootWebOnly="TRUE" />
         </Lists>
         <Modules>
            <Module Name="SiebelTeamspace"/>
            <Module Name="WebPartPopulation"/>
         </Modules>
      </Configuration>
```

d In the Modules element, remove all Module elements except for the one Module element where Name="WebPartPopulation".

NOTE: Make sure you are in the top-level Modules element, below the configurations element. Do not delete the single-line module elements contained in the Configuration elements.

```
            <List Title="List Template Gallery"
                Type="114"
                Url="_catalogs/lt"
                RootWebOnly="TRUE" />

        </Lists>
        <Modules>
            <Module Name="DWS"/>
            <Module Name="WebPartPopulation"/>
        </Modules>
    </Configuration>
</Configurations>
<Modules>
    <Module Name="Default" Url="" Path="">
        <File Url="default.aspx" NavBarHome="True">
            <View List="104" BaseViewID="0" WebPartZoneID="Left"/>
            <View List="106" BaseViewID="0" WebPartZoneID="Left" WebPartOrder="2"/>
            <AllUsersWebPart WebPartZoneID="Right" WebPartOrder="1">
            ...
```

e Add the following text to the Modules element; add the text after the one Module element that you did not remove in Step d.

```
<Module Name="SiebelTeamspace" Url="">
    <File Url="default.aspx">
       <AllUsersWebPart WebPartZoneID="Top" WebPartOrder="1">
          <![CDATA[
             <WebPart xmlns="http://schemas.microsoft.com/WebPart/v2">
                <Title>Siebel Collaboration</Title>
                <Description>Summary data for Siebel Collaboration team sites
                </Description>
                <Assembly>SiebelWebParts, Version=1.0.0.0, Culture=Neutral,
PublicKeyToken=20916967cfa1c936</Assembly>
                <TypeName>Siebel.WebParts.SiebelWebPart</TypeName>
                <UnexpectedError xmlns="Siebel.WebParts">An unexpected error has
occurred. Please contact your System Administrator.</UnexpectedError>
             </WebPart>
          ]]>
       </AllUsersWebPart>
       <AllUsersWebPart WebPartZoneID="Left" WebPartOrder="1">
          <![CDATA[
             <WebPart xmlns="http://schemas.microsoft.com/WebPart/v2">
                <Assembly>Microsoft.SharePoint, Version=11.0.0.0,
Culture=neutral, PublicKeyToken=71e9bce111e9429c</Assembly>
                <TypeName>Microsoft.SharePoint.WebPartPages.MembersWebPart
                </TypeName>
                <Title>Members</Title>
                <Description>Use the Members Web Part to see a list of the site
members and their online status.</Description>
                <FrameType>Standard</FrameType>
             </WebPart>
          ]]>
       </AllUsersWebPart>
       <View List="108" BaseViewID="1" WebPartZoneID="Right" WebPartOrder="1"/>
       <View List="101" BaseViewID="1" WebPartZoneID="Right" WebPartOrder="2"/>
       <View List="107" BaseViewID="4" WebPartZoneID="Right" WebPartOrder="3"/>
       <NavBarPage Name="Home" ID="1002" Position="Start">  </NavBarPage>
       <NavBarPage Name="Home" ID="0" Position="Start">  </NavBarPage>
    </File>
</Module>
```

f Translate strings as described in the following table.

String Values	Location	Example[1]
Strings "Siebel Navbar" and "Team Space"	NavBar element named Siebel Navbar	Step a
String for the Name attributes	NavBarLink element in the NavBar element named Siebel Navbar	Step a

String Values	Location	Example[1]
Strings for the Title attributes	List elements of the Configuration elements named Opportunity and Service Request	Step c
Strings for Title, Description, and UnexpectedError attributes	WebParts elements titled Siebel Collaboration and Members in the SiebelTeamspace module	Step e
Strings for the Name attributes	NavBarPage elements in the SiebelTeamspace module	Step e

1. Examples are displayed in bold.

5 Edit the ASPX files in the LISTS directory (*SharePoint Services Web Service Extension Directory*\TEMPLATE*lcid*\SIEBEL\LISTS).

The files in the DISCUSS, TASKS, and DOCLIB directories need to be edited. Files in the other directories only need to be edited if you have customized your Siebel site definition to include display pages from other directories.

a Locate the line beginning with `<%@ Page language="C#"...` and add this line immediately above it:

```
<%@ Register Tagprefix="SIEBEL" Namespace="Siebel.WebParts"
Assembly="SiebelWebParts, Version=1.0.0.0, Culture=neutral,
PublicKeyToken=20916967cfa1c936" %>
```

```
<!-- _LocalBinding -->
<%@ Register Tagprefix="SIEBEL" Namespace="Siebel.WebParts" Assembly="SiebelWebParts,
Version=1.0.0.0, Culture=neutral, PublicKeyToken=20916967cfa1c936" %>
<%@ Page language="C#"
```

b Locate the HTML for the SharePoint top navigation bar, which begins with `<!-- Banner -->` and wrap these HTML tags around it:

```
<SIEBEL:HideDataInSiebelApp runat=server> .... </SIEBEL:HideDataInSiebelApp>
```

```
    <!-- Banner -->
<SIEBEL:HideDataInSiebelApp runat=server>
<TR>
  <TD COLSPAN=3 WIDTH=100%>
  <!--Top bar-->
  <table class="ms-bannerframe" border="0" cellspacing="0" cellpadding="0" width="100%">
   <tr>
    <td nowrap valign="middle"><img ID=onetidHeadbnnr0 alt="Logo"
src="/_layouts/images/logo.gif"></td>
     <td class=ms-banner width=99% nowrap ID="HBN100" valign="middle">
      <!--webbot bot="Navigation"
                S-Type="sequence"
       ...
                U-Page="sid:1002"
                S-Target startspan -->
<SharePoint:Navigation LinkBarId="1002" runat="server"/>
<!--webbot bot="Navigation" endspan -->
     </td>
    <td class=ms-banner>  </td>
    <td nowrap class=ms-banner style="padding-right: 7px">
       <SharePoint:PortalConnection runat="server" />
    </td>
   </tr>
  </table>
  </TD>
 </TR>
</SIEBEL:HideDataInSiebelApp>
```

c Locate the HTML for the left navigation bar, which begins below `<TD valign=top height=100% class=ms-nav>` and insert this HTML:

```
<SIEBEL:HideDataInSiebelApp ShowInSiebel="true"
runat=server><SharePoint:Navigation LinkBarId="1012" runat="server"/>
</SIEBEL:HideDataInSiebelApp>
```

```
<TD valign=top height=100% class=ms-nav> <SIEBEL:HideDataInSiebelApp
ShowInSiebel="true" runat=server><SharePoint:Navigation LinkBarId="1012"
runat="server"/> </SIEBEL:HideDataInSiebelApp>
```

6 Edit the config.xml file in the *Siebel-SharePoint Integration*\config directory:

a Locate the Languages element.

The Languages element in the config.xml file maps the Siebel language (for example ENU) to the SharePoint locale.

CAUTION: Do not change the value for defaultlcid in the config.xml file. Leave it set to 1033 to indicate that the default is U.S. English if a language mapping is not found.

b Add additional language mappings to the Languages element as follows:

```
<Language code=Siebel Language <Language code="Siebel language" lcid="language
ID" />
```

For example, to add French:

```
<Languages defaultlcid="1033">
  <Language code="ENU" lcid="1033" />
  <Language code="FRA" lcid="1036" />
</Languages>
```

c Search the config.xml file for strings of the format:

```
<LocaleText lcid="1033" text="
```

and, for each found, add a LocaleText element for the new language that contains the translated text.

For example:

```
<Name>
  <LocaleText lcid="1033" text="Service Request" />
  <LocaleText lcid="1036" text="Demande d’assistance" />
</Name>
```

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