

**Oracle® Universal Content Management**  
Siebel Adapter Installation and Configuration Guide  
Release 10gR3

July 2009

Siebel Adapter Installation and Configuration Guide, Release 10gR3

07/13/2009

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# Preface

This guide describes how to install, configure, and use the Siebel Adapter for Universal Content Management.

## Audience

This document is intended for administrators configuring Content Server and Siebel systems.

## Conventions

The following text conventions are used in this document:

<b>Convention</b>	<b>Meaning</b>
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.



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# Introduction

This document describes how to install, configure, and use the Siebel Adapter for Universal Content Management (UCM).

## 1.1 About the Adapter

The Siebel Adapter for UCM allows Siebel CRM users to scan, attach, store, and retrieve attachments stored in a UCM Content Server repository. UCM documents are displayed as managed attachments to Siebel entities in a customizable iFrame within the Siebel application.

### Supported Siebel Entities

The Managed Attachments iFrame is supported for the following Siebel entities:

- Account
- Activity
- Contact
- Asset
- Call Report
- Claim
- Opportunity
- Order
- Project
- Quote
- Service Request
- Public Sector Case objects, including:
  - Case
  - Arrest
  - Offense
  - Incident
  - Evidence
  - Lead
  - Group
  - Group Suspect

### **Managed Attachments Options**

When a Siebel user displays a Siebel record such as a contact, UCM Content Server lists the attachments to which the user has access in a Managed Attachments iFrame.

Siebel users can perform the following tasks in the attachments iFrame:

- Open documents in their native application or Web-viewable format
- Check in new documents to Content Server and attach them to the selected Siebel entity
- Detach documents from a Siebel entity
- Refresh the iFrame's list of attachments
- Select and order fields for display in the attachments iFrame
- Search Content Server using advanced search options
- View an attached document's information
- Check out documents, locking them to changes by other users
- Modify a document's metadata values
- Scan and import documents via Oracle Distributed Document Capture, attaching them to a selected Siebel entity

For details about how users work with UCM documents in a Siebel application, see "[Managed Attachments Functionality](#)" on page 3-1.

### **User Authentication**

Siebel users must have a Content Server account in order to display the Managed Attachments iFrame within the supported Siebel entity. In addition, the authentication model configured for Content Server and Siebel determines how users are authenticated the first time they display a Siebel record that includes the attachments iFrame:

- Content Server configured for single sign-on (SSO): If Siebel is not configured for SSO, the UCM SSO login prompt is displayed. (If Siebel is configured for SSO, the user has already been authenticated so no login prompt is displayed.)
- Content Server *not* configured for SSO: The Content Server login prompt is displayed, regardless of the selected Siebel authentication model.

### **Security**

Users set a document's security when checking it into Content Server. In the attachments iFrame, Siebel users see only those attachments to which their Content Server account allows them access. So a document attached to a Siebel entity does not appear in the search results for an unauthorized user. It is recommended to use a profile that specifies default security values for document check-in.



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# Installation and Configuration

This section covers the following topics:

- ["Installation Requirements"](#) on page 2-1
- ["Installing the Adapter"](#) on page 2-1
- ["Configuring the Adapter for UCM"](#) on page 2-2
- ["Configuring the Adapter for Siebel"](#) on page 2-7
- ["Configuring Distributed Document Capture"](#) on page 2-13
- ["Passing Extra Metadata Parameters From Siebel to UCM"](#) on page 2-20
- ["Customizing the Siebel Adapter iFrame Display"](#) on page 2-22
- ["Uninstalling the Adapter"](#) on page 2-27

## 2.1 Installation Requirements

The Siebel Adapter for Universal Content Management requires the following:

- Siebel SIA or SEA version 7.8.2.x, 8.0.0.x, or 8.1.1.x. The Siebel Web Client is also required.
- UCM 10gR3 v10.1.3.4.1 or higher.

This adapter supports Metadata Only Search or Database - Full Text Search. (It does not support Oracle Text - Full Text Search.)

## 2.2 Installing the Adapter

Follow these steps to install the adapter.

1. Locate and copy the UCM Siebel adapter file.

The Siebel and UCM components are bundled in a file called *Siebel\_UCM\_10gR3\_YYYYMMDD.zip*.

2. Unzip the file into a temporary location.

The adapter file contains two folders:

- The *ecm folder* contains files for UCM configuration, as described in ["Configuring the Adapter for UCM"](#) on page 2-2.
- The *siebel folder* contains files for Siebel configuration, as described in ["Configuring the Adapter for Siebel"](#) on page 2-7.

## 2.3 Configuring the Adapter for UCM

The UCM configuration procedures include the following:

- ["Verify Required UCM Components"](#) on page 2-2
- ["Install and Enable the Adapter UCM Components"](#) on page 2-3
- ["Install the Configuration Migration Utility Bundle"](#) on page 2-4
- ["Set the Configuration Variables"](#) on page 2-5

### 2.3.1 Verify Required UCM Components

Follow these steps to verify that required UCM components are enabled on the Content Server.

1. Log in to Content Server as an administrator.
2. Click the **Configuration for [Instance]** link in the content server Administration tray.
3. In the Features And Components section, click **Enabled Component Details**.
4. From the details shown, verify that the following components are enabled. If a component is not listed, install and enable it according to its installation documentation.
  - ConfigMigrationUtility
  - YahooUserInterfaceLibrary
  - CheckoutAndOpenInNative
  - CoreWebdav

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**Note:** The above components must be at or above the version level included with UCM 10gR3 v10.1.3.4.

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## 2.3.2 Install and Enable the Adapter UCM Components

The following UCM components are provided with the adapter:

**Table 2–1 UCM Components Provided in Siebel Adapter**

UCM Component	Required	Description
SiebelEcmIntegration	Yes	This component provides iFrame functionality.
SiebelIntegrationSearchDisplay	Yes	This component provides searching and iFrame functionality.
SiebelSearchExtension	Optional	<p>This component determines whether documents not yet released are displayed in the attachments list.</p> <ul style="list-style-type: none"> <li>▪ If enabled, all documents in the system are displayed, including those waiting to be indexed or in workflow. When users hover their cursor over an unreleased document, no underline is displayed and the item cannot be selected.</li> <li>▪ If not enabled, only released documents are displayed.</li> </ul> <p><b>Note:</b> This feature is available only when Metadata Only Search is used on the Content Server.</p>
SiebelSearchExtraParams	Optional	<p>This component enables passing Siebel metadata values to UCM via the New or Scan buttons. For instructions, see <a href="#">"Passing Extra Metadata Parameters From Siebel to UCM"</a> on page 2-20. Specify parameters to pass as configuration variables, as described in <a href="#">"Set the Configuration Variables"</a> on page 2-5.</p>

Follow these steps to install the components using Component Manager.

1. Log in to Content Server as an administrator.
2. Select **Admin Server** from the Administration menu.  
The Content Admin Server page is displayed.
3. Click the name of the Content Server instance where the component will be installed.  
The Content Admin Server <instance\_name> page is displayed.
4. Click **Component Manager**.  
The Component Manager page is displayed.
5. Click **Browse**, navigate to the SiebelEcmIntegration.zip file, and select it.
6. Click **Open**.  
The path is displayed in the Install New Component field.
7. Click **Install**.  
Component Manager lists the zip file contents that will be installed.
8. Click **Continue**.  
Component Manager displays a message that the SiebelEcmIntegration component was uploaded and installed successfully. The message asks if you want to enable the component immediately or return to the Component Manager.
9. Return to the Component Manager.
10. Click **Browse**, navigate to the next component file, and select it.
11. Click **Open**.  
The path is displayed in the Install New Component field.

**12. Click *Install*.**

Component Manager lists the zip file contents that will be installed.

**13. Click *Continue*.**

Component Manager displays a message that the component was uploaded and installed successfully. The message asks if you want to enable the component immediately or return to the Component Manager.

**14. Return to the Component Manager. Repeat steps 10 through 13 to install all components.**

**15. Enable all of the components you installed and restart Content Server.**

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**Note:** Enabling the SiebelSearchExtension and SiebelSearchExtraParams components is optional. You can disable them at any time.

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### 2.3.3 Install the Configuration Migration Utility Bundle

Follow these steps to upload and import the Siebel adapter bundle.

1. Log back in to Content Server as an administrator.
2. In Content Server, open the Config Migration Admin folder in the content server Administration tray, and click the **Upload Bundle** link.
3. On the Upload Configuration Bundle page, click **Browse**.
4. Locate and select the SiebelIntegrationCmuBundle.zip CMU bundle in the ecm folder of the adapter. Select the **Force overwrites** field.
5. Click **Upload**.
6. On the Configuration Bundles Page, select the **SiebelIntegrationCmuBundle** link. On the Configuration Migration Admin page, select the **Overwrites Duplicates** field. Select **Preview** from the item's Actions menu.
7. On the Import Preview page, select **Import** from the Actions field. (Note that you can ignore messages about skipped dependencies.)
8. Restart Content Server.

## 2.3.4 Set the Configuration Variables

Follow these steps to configure the adapter configuration variables.

1. From the Administration tray in Content Server, click the **Admin Server** link.
2. Select the Content Server you want to configure.
3. From the side pane, click the **General Configuration** link.
4. Scroll to the Additional Configuration Variables section, and edit the following entries. (These entries were automatically created when you installed the Configuration Migration Utility Bundle.)

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**Note:** The default value for all true/false entries is TRUE.

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**Table 2–2 Configuration Variable Entries**

Entry	Description
SiebelCssPath=http://<siebel_host>:<port>/main.css	Use to identify the Cascading Style Sheet (CSS) file to use for the iFrame. This entry links the Siebel CSS file with the adapter so that changes to the Siebel CSS also affect the iFrame. This is optional but recommended; if not specified, the iFrame will use the default CSS file. <b>Example Siebel 7.8 URL:</b> http://<siebelserver>:<port>/files/main.css <b>Example Siebel 8.x URLs:</b> http://<siebelserver>:<port>/callcenter_enu/files/main.css http://<siebelserver>:<port>/sales_enu/files/main.css
ODDCURLPath=http://<ODDC_host>/<ODDC_webcapture_address>	Use to enable document attachment scanning and importing via Oracle Distributed Document Capture. For configuration instructions, see " <a href="#">Configuring Distributed Document Capture</a> " on page 2-13. This entry specifies the web address to Oracle Distributed Document Capture. <b>Example entry:</b> ODDCURLPath=http://xyz/webcapture.asp
ODDCScanAction=1 ODDCScanAction=2	Use to configure document attachment scanning and importing via Oracle Distributed Document Capture, as described in " <a href="#">Configuring Distributed Document Capture</a> " on page 2-13. In this entry, specify the scan action to be performed, where 1 = Scan and 2 = Import.
AdapterAppFrameLessWindowRequired=true	Specify if standard browser menu options are hidden in browser windows that open from the iFrame display (true) or displayed (false).
AdapterAppCheckinNewBtnVisible=true	Specifies if the New button is displayed in the iFrame.
AdapterAppDetachBtnVisible=true	Specifies if the Detach button is displayed in the iFrame.
AdapterAppAdvSrchBtnVisible=true	Specifies if the Search button is displayed in the iFrame.
AdapterAppConfigureBtnVisible=true	Specifies if the Configure button is displayed in the iFrame.
AdapterAppScanBtnVisible=true	Specifies if the Scan button is displayed in the iFrame.
AdapterAppRefreshBtnVisible=true	Specifies if the Refresh button is displayed in the iFrame.

**Table 2–2 (Cont.) Configuration Variable Entries**

Entry	Description
AdapterAppAdvSrchUCMUIVisible=true	Specifies if full Content Server user interface and search access is available when users click the Advanced Search button in the iFrame.
extraSiebelDocParams=<parameter>,<parameter>,<parameter>,<...>	Optionally specify additional parameters to be passed to the New button. See " <a href="#">Passing Extra Metadata Parameters From Siebel to UCM</a> " on page 2-20. <b>Example entry:</b> extraSiebelDocParams=dDocAccount,xsiebelOrder
extraSiebelScanParams=<parameter>,<parameter>,<parameter>,<...>	Optionally specify additional parameters to be passed to the Scan button. See " <a href="#">Passing Extra Metadata Parameters From Siebel to UCM</a> " on page 2-20. <b>Example entry:</b> extraSiebelScanParams=dDocAccount

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**Note:** The entries that determine if the New, Detach, Search, Configure, Scan, and Refresh buttons are displayed can be overridden by specifying an alternate display mode, as described in "[Dynamically Change the Display Mode](#)" on page 2-23.

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**Note:** You can specify the default columns to be displayed to users in the iFrame. (When the user clicks **Reset** in the [Configure Fields for Display Screen](#), default columns are listed in the Main Information section of the screen.)

Open the config.cfg file and set the value of the *SiebelDefaultDisplayColumns* configuration variable as a comma-separated list containing the default fields.

The additional column defaults are title, author, size, and date. If you would like to override these additional columns, populate this variable with comma-separated UCM metadata field names. For example, the list might include:

dDocTitle,dDocType,dDocAuthor,dInDate

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5. Restart Content Server.

## 2.4 Configuring the Adapter for Siebel

Follow the steps described in this section to configure the Siebel side of the adapter.

The Siebel configuration procedures include the following:

- ["Lock Siebel Objects"](#) on page 2-7
- ["Import the SIF File"](#) on page 2-8
- ["Compile Locked Projects"](#) on page 2-9
- ["Configure the iFrame URL in the Siebel Web Client"](#) on page 2-10
- ["Test the Siebel Configuration"](#) on page 2-12

### Important Points

Keep the following points in mind during Siebel configuration:

- Ensure that you are compiling to and testing on the same Siebel Repository file (.SRF).
- A typical method is to import the SIF file into the local Siebel database and test it locally. When ready, you can check in the objects to the Siebel server, compile objects, and generate browser scripts.
- New browser scripts that are generated must reside in the appropriate production location (for example, <local client>/PUBLIC/ENU and/or <server Web client (SWE)>/PUBLIC/ENU folders).
- Performing the Siebel configuration steps in this section automatically disables display of the corresponding Siebel File System Applets. This occurs when importing the SIF file, which deactivates specific File System attachment applets. If needed, you can reactivate these applets to display Siebel File System attachments, such as during a migration process. Activating and deactivating applets is described in ["Siebel Object Locking"](#) on page A-1.
- When the Siebel Adapter for UCM is configured, Siebel attachments that customers have migrated from Siebel File Systems to UCM and previously accessed with Siebel EAI or EIM Web services are no longer available. However, these migrated documents could now be accessed via UCM Web services.

### 2.4.1 Lock Siebel Objects

The SIF archive file contains changes to multiple Siebel objects, including Projects, Applets, Views, Business Components, and browser scripts. Before importing the SIF file, follow these steps to lock objects that will be modified by the import.

1. Log in to Siebel Tools with User ID: SADMIN and Connect to: Local.

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**Note:** Ensure that you are modifying the correct .SRF repository file.

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2. In the Object Explorer of Siebel Tools, select **Project**.
3. From the Query menu, select **New Query** (Ctrl+Q).

4. Submit the first query by entering the following text into the **Name** field and pressing Enter.

```
Account OR Account ?SSE? OR Asset Management OR Contact OR  
Contact ?SSE? OR ERM Unified Help Desk OR FINS Call Reports  
OR FINS Call Reports ?SSE? OR FINS INS Claims OR FINS INS  
Claims Appraisals/Bills/Attachments OR Oppty OR Oppty ?SSE?  
OR Order Entry OR Quote OR Quote ?UI?
```

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**Note:** If you choose to copy and paste the text string, be sure to first paste the copied text into an ascii editor (such as Notepad) and remove any carriage returns before pasting into the Name field.

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5. Select the **Locked** field for all objects.
6. Start another query by selecting **New Query** from the Query menu (Ctrl+Q). Enter the following text into the **Name** field and press Enter.

```
Service OR Service ?SSV? OR VERT CUT Common OR PS Project  
Management OR PS Project Management ?SSE? OR Activity OR  
Activity ?SSE? OR PUB Case OR PUB Evidence OR PUB HLS  
Incident OR PUB HLS Physical Terrorism OR PUB Lead OR FINS  
Call Reports2
```

7. Select the **Locked** field for all objects.

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**Note:** [Appendix A](#) provides information about which objects are locked. This can be useful if you encounter issues when locking Siebel projects.

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## 2.4.2 Import the SIF File

Follow these steps to import UCM objects from a Siebel archive file using the Import Wizard.

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**Caution:** On certain custom Siebel configurations, importing the SIF file using the merge option (as described in this procedure) could result in fields, user properties, and joins from custom Siebel configurations being overwritten.

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1. From the Tools menu, choose **Import From Archive**.
2. In the Select Archive To Import dialog box, select the appropriate .sif archive file, and click **Import**. Available SIF files include:
  - Siebel\_SEA\_7.x\_UCM\_Attachments\_YYYYMMDD.sif
  - Siebel\_SIA\_8.x\_UCM\_Attachments\_YYYYMMDD.sif
  - Siebel\_SIA\_7.x\_UCM\_Attachments\_YYYYMMDD.sif
  - Siebel\_SEA\_8.x\_UCM\_Attachments\_YYYYMMDD.sif
3. The SIF file's contents are displayed in the Import Wizard - Preview screen. Ensure that the **Merge** option (middle radio button) from the Conflict Resolution options is selected, and click **Next**. (This will merge the SIF file changes to existing Siebel Objects.)

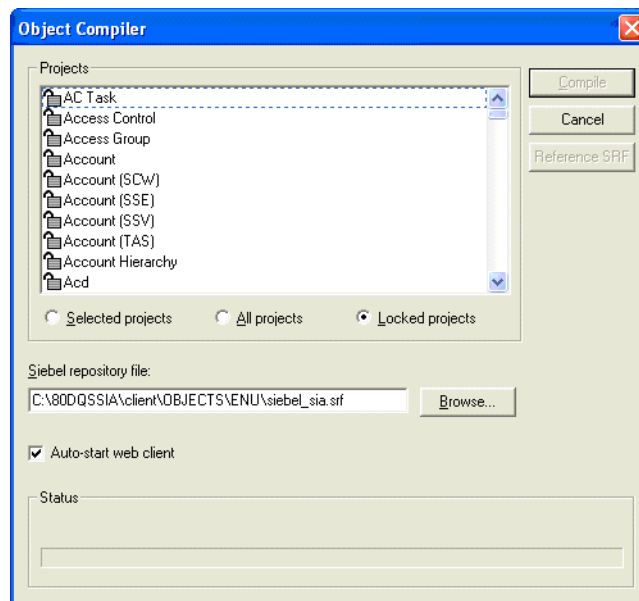


4. The wizard displays any conflicting objects found. Click **Next**.
5. A dialog box lists the changes to be made to the repository, and asks if you want to proceed. Click **Yes**.
6. A summary is displayed. Click **Finish**.

### 2.4.3 Compile Locked Projects

Before testing the modified projects, follow these steps to compile them.

1. Select **Options** from the View menu.
2. In the Development Tools Options screen, select the Scripting tab.
3. In the **Browser script compilation folder** field, enter a path as follows:  
 <Client Install Folder>/PUBLIC/ENU  
 For example, on Windows <Drive\_letter>:\<Siebel\_install\_folder\_path>\client\PUBLIC\enu
4. Select **Project** in the Object Explorer, locate the *Manage Attachments (UCM)* project and lock it.
5. From the Tools menu, choose **Compile Projects**.



6. In the Object Compiler screen, select **Locked projects**.
7. Verify that the correct repository is selected in the **Siebel repository file** field. This repository file must exist in the Web Client installation folder.
8. Click **Compile**. (Note that compiling may take a while.)

## 2.4.4 Configure the iFrame URL in the Siebel Web Client

Follow the steps in this section to configure a symbolic URL in the Siebel Web client to the Managed Attachments iFrame. (A symbolic URL is a type of link that references the UCM search results page.)

1. Launch the Web client, logging in with the User ID: SADMIN.
2. Choose **Sitemap** from the Navigate menu. The site map of the Siebel Web Client Application is displayed.
3. From the list of screens, click the *Administration- Integration* link, then the *Symbolic URL Administration* link.
4. From the Host Administration field, select **Symbolic URL Administration**.
5. Create a new record by clicking the **New** button.
6. Complete the following fields for the URL. With the new URL selected in the Symbolic URL table, a Symbolic URL Arguments pane becomes displayed below.

Field	Value to Enter
Name	UcmServUrl
URL	http://UCM_Server_URL (ex. http://<ucm-server-name.domain>/idc/idcplg)
Fixup Name	InsideApplet
SSO Disposition	IFrame

**Note:** In certain demonstration environments, entering `UcmServUrl` in the **Name** field results in an error. If this occurs, enter the following:

`UcmServUrl_Demo`

7. In the Symbolic URL Arguments pane, create new argument records by entering the following values. To create a new record, click the **New** button, select the new record, and specify its values. Be sure to navigate away from the last record entered to ensure it is saved to the database.

Name	Required Argument	Argument Type	Argument Value	Append as Argument	Substitute in Text	Sequence #
IdcService	N	Constant	GET_SEARCH_RESULTS_FORCELOGIN	Y	N	1
siebelEntityField	N	Field	SiebelEntityName	Y	N	2
siebelEntityValue	N	Field	Id	Y	N	3
QueryText	N	Field	QueryText	Y	N	4
SearchQueryFormat	N	Constant	Universal	Y	N	5
ResultTemplate	N	Constant	SIEBEL_SEARCH	Y	N	6
coreContentOnly	N	Constant	1	Y	N	7
SortField	N	Constant	dInDate	Y	N	8
SortOrder	N	Constant	Desc	Y	N	9

Name	Required Argument	Argument Type	Argument Value	Append as Argument	Substitute in Text	Sequence #
ResultCount	N	Constant	6 (See "Configuring the iFrame Height" on page 2-11.)	Y	N	10
IFrameSRC	N	Command	IFrame Height=280 Width=100% (See "Configuring the iFrame Height" on page 2-11.)	Y	N	11

Name	URL	Host Name	Fixup Name	Multivalue Treat	SSO Disposition	Web Application Name
> UcmServUr	http://www.google.com		InsideApplet		IFrame	

Name	Required Argument	Argument Type	Argument Value	Append as Argum	Substitute in Text	Sequence #
IdcService		Constant	GET_SEARCH_RESULTS_FORCELOGIN	✓		1
siebelEntityField		Field	SiebelEntityName	✓		2
siebelEntityValue		Field	Id	✓		3
QueryText		Field	QueryText	✓		4
SearchQueryFormat		Constant	Universal	✓		5
ResultTemplate		Constant	SIEBEL_SEARCH	✓		6
coreContentOnly		Constant	1	✓		7
> SortField		Constant	dInDate	✓		8
SortOrder		Constant	Desc	✓		9
ResultCount		Constant	6	✓		10
IFrameSRC		Command	IFrame Height=280 Width=100%	✓		11

### 2.4.4.1 Configuring the iFrame Height

The size of the iFrame is based on the ResultCount and IFrameSRC height settings defined in the Symbolic URL.

- *ResultCount* determines the number of results that display on a results page before pagination controls are added at the bottom of the screen.
- *IFrameSRC height* determines the height (in pixels) of the iFrame.

If the ResultCount setting causes the iFrame display to exceed the height, a vertical scroll bar is displayed. If users scroll to the bottom, the header information may become hidden.

For this reason, it is recommended that you adjust the ResultCount and IFrameSRC height settings in combination so that no scroll bar is displayed. Ensure that the iFrame height accommodates the result count. A recommended setting combination is an iFrame height setting of 280 and ResultCount setting of 6.

## 2.4.5 Test the Siebel Configuration

1. Log out of the Web client, then log in again to view the Managed Attachments iFrame embedded in the Attachments tab.

**Tip:** To access Views, choose **Sitemap** from the Navigate menu in the Web client. This displays opportunities, orders, and other options with their child Views and attachment Views.

2. Test the changes locally. After testing is successful, ensure that the objects, including generated browser scripts, are synchronized with the Siebel server.

---

---

**Note:** If you encounter technical issues in configuring this adapter, on either the UCM side or the Siebel side, log a service request using My Oracle Support.

---

---

## 2.5 Configuring Distributed Document Capture

This section covers the following topics:

- ["About Document Scanning Using Oracle Distributed Document Capture"](#) on page 2-13
- ["Configure Oracle Distributed Document Capture For the Siebel Adapter"](#) on page 2-14
- ["Configure UCM for Distributed Document Capture Via the Siebel Adapter"](#) on page 2-18
- ["Test the Distributed Document Capture Via Siebel Adapter Configuration"](#) on page 2-19

### 2.5.1 About Document Scanning Using Oracle Distributed Document Capture

The Oracle Distributed Document Capture application allows an application such as the Siebel Adapter to direct it to scan a document and pass in document index values. This allows users to scan documents or import scanned image files from the Managed Attachments iFrame and attach them to the selected Siebel record.

When configured for the Siebel Adapter, document scanning works like this:

- A **Scan** button is added to the Managed Attachments iFrame (see ["Managed Attachments iFrame"](#) on page 3-7). The user clicks the button, and selects a **document classification**, which is assigned to an Oracle Distributed Document Capture scan profile. For example, the user might select a classification of *Identity Documents* to scan a photocopy of a drivers license or passport. (An Oracle Distributed Document Capture scan profile specifies scanning, importing, and indexing settings.)
- When the user clicks the Scan Document button, Oracle Distributed Document Capture's remote client launches in a new window, automatically authenticates and logs in the user, and passes in parameters such as the scan profile to be used and the Siebel entity value for later attachment.
- Within the Oracle Distributed Document Capture client, the user reviews the document, makes changes as needed, completes any index fields configured in the scan profile, then sends the batch. Sending the batch commits the new document to UCM using a UCM commit profile specified for the scan profile. (A Capture UCM commit profile specifies connection information and field mappings between Capture and Content Server metadata fields.)
- Upon successful sending, the user returns to the Managed Attachments iFrame and refreshes the display to view the newly scanned document or imported scanned image file.

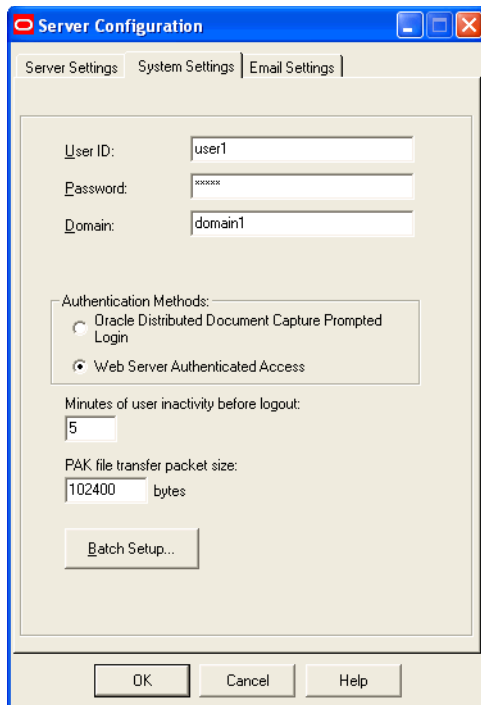
## 2.5.2 Configure Oracle Distributed Document Capture For the Siebel Adapter

Follow these steps to configure attachment scanning on the Oracle Distributed Document Capture side.

1. Ensure that Oracle Distributed Document Capture is set for automatic login (optional).

On the System Settings tab of the Distributed Document Capture Server Configuration application shown in [Figure 2-1](#), select **Web Server Authenticated Access** from the Authentication Methods options. This allows the client to launch automatically without users needing to log in. For details, see the section on authentication in the *Installation Guide for Oracle Distributed Document Capture*.

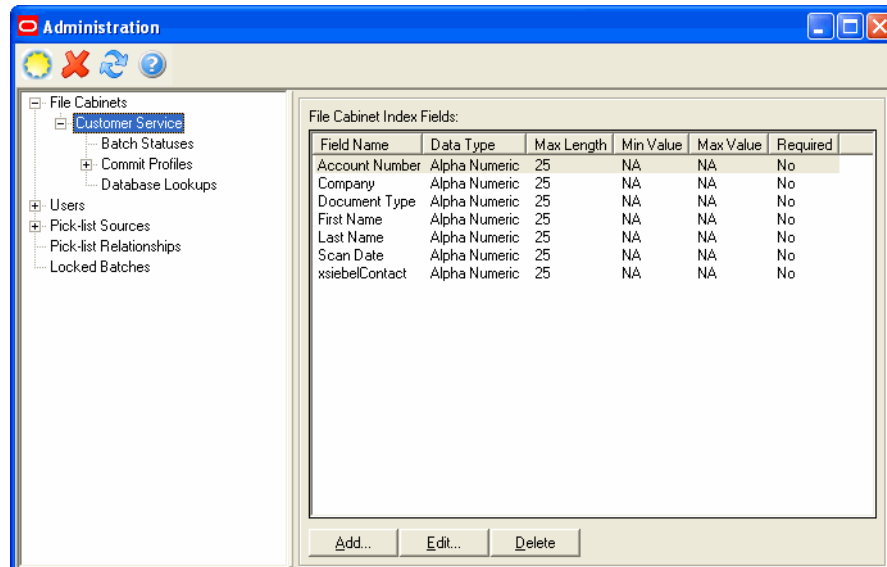
**Figure 2-1 Distributed Document Capture Server Configuration, System Settings Tab**



2. In Capture Administration, add index fields to a selected file cabinet for capturing values for new documents, as shown in [Figure 2-2](#). For details, see the section on Capture Administration in the *Administrator's Guide for Oracle Distributed Document Capture*.
  - Create index fields for values you want saved with attached documents on the Content Server. For example, you might configure Doc Type and Security Group pick-list index fields for users to select from standard settings.
  - Create an index field to contain the Siebel entity value. Name the field based on the Siebel entity you are using, listed in [Table 2-3](#):

**Table 2–3 Siebel Entity Identifier**

xsiebelAcct
xsiebelActivity
xsiebelArrest
xsiebelAsset
xsiebelCallRpt
xsiebelCase
xsiebelClaim
xsiebelContact
xsiebelEvidence
xsiebelGroup
xsiebelIncident
xsiebelLead
xsiebelOffense
xsiebelOpprnty
xsiebelOrder
xsiebelProject
xsiebelQuote
xsiebelSuspect
xsiebelSvcReq

**Figure 2–2 Capture Administration, Index Fields**

3. In Oracle Distributed Document Capture's Profile Administration, create a scan profile, as shown in [Figure 2–3](#). You will later associate this scan profile with one or more document classifications, so that when a user selects a classification, the associated scan profile's settings are used. For details, see the section on scan profiles in the *Administrator's Guide for Oracle Distributed Document Capture*.

- On the General pane, select **2 - Scan and Index Documents** in the Scanning Type field. This scanning type includes indexing, and scans or imports pages into a single document in a batch. Specify a file cabinet and batch prefix.
- On the Document Indexing pane, move all fields you want displayed to users to the Selected Fields box.

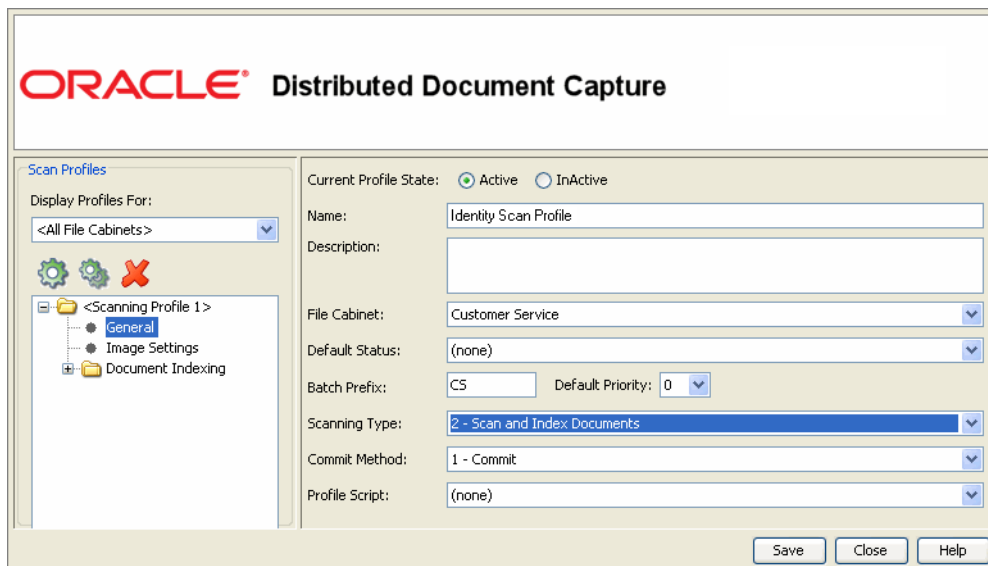
---

**Note:** Typically, you would not select the Siebel identifier field (xsiebelContact, for example) for display to users. If you choose to display it, lock it on the Field Properties pane to prevent users from changing the value.

---

- On the Field Properties, Auto Populate, and Database Lookup panes, configure any pick-lists, database lookups, or autopopulating needed for indexing. Save the scan profile.

**Figure 2–3 Scan Profiles, Oracle Distributed Document Capture Profile Administration**



4. In Capture Administration, create a UCM commit profile that will commit the scanned or imported documents to UCM when users send a completed batch. See [Figure 2–4](#).

This commit profile will specify how to connect to the Content Server, and how the Siebel and Capture values will be passed to the Content Server. For information about creating UCM commit profiles, see the section on committing profiles in the *Administrator's Guide for Oracle Distributed Document Capture*.

- Select **Oracle UCM Commit Driver** in the Commit Driver field. Click the Configure button adjacent to the Commit Driver field.
- On the Login tab, specify settings for logging in to the Content Server instance. (The other tabs become active after you log in.)
- On the Check-In tab, specify how you want documents named and Type, Security Group, and Account values assigned.



- On the Field Mappings tab, map Capture fields to Content Server fields.

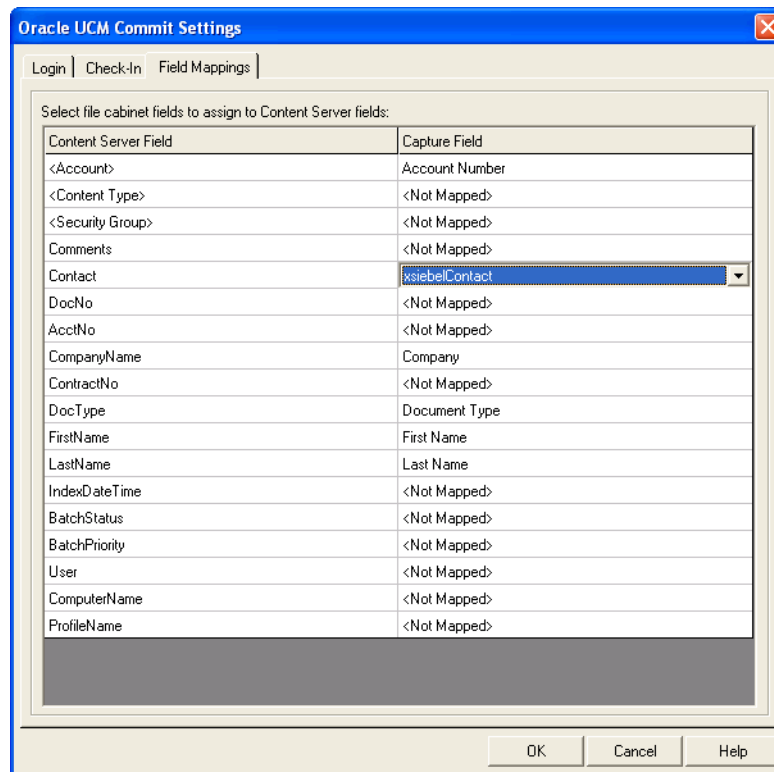
---

**Note:** You must map the Siebel entity field you created in step 2, as it is required to attach the new UCM document to the Siebel record.

---

- Activate the Siebel-UCM commit profile.

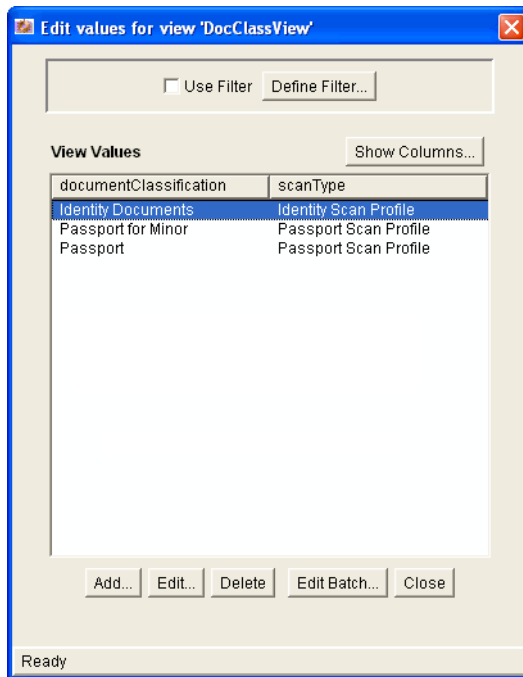
**Figure 2–4 Capture Administration, Oracle UCM Commit Settings**



## 2.5.3 Configure UCM for Distributed Document Capture Via the Siebel Adapter

Follow these steps to configure attachment scanning on the Content Server side.

1. On Content Server, edit the following configuration variables for Oracle Distributed Document Capture, if you have not already done so, and restart Content Server. See "[Set the Configuration Variables](#)" on page 2-5.
  - ODDCURLPath=http://<ODDC\_host>/<ODDC\_webcapture\_address>
  - ODDCScanAction=<ODDC Scan Action>
  - AdapterAppScanBtnVisible=true
2. On Content Server, configure document classification and scan types.
  - From the Administration tray in Content Server, click the **Admin Applets** link.
  - Select the Configuration Manager applet. The Configuration Manager is displayed.
  - Click the Views tab, select DocClassView from the alphabetical list, and click **Edit Values**.



3. In the Edit Values screen, click **Add** and add document classifications and their corresponding scan profile. Note that documentClassifications entries must be unique, but a scan profile can be used multiple times. Click **Close** when done.
4. From the Options menu, select **Publish schema** to publish the data.

## 2.5.4 Test the Distributed Document Capture Via Siebel Adapter Configuration

Follow these steps to test the configuration as an end-user. For details, see "[Scanning Via Oracle Distributed Document Capture](#)" on page 3-5.

1. Refresh the Managed Attachments iFrame results page. You should see a Scan button beside the New button.
2. Click the Scan button. In the Scan Document page, select a document classification and click **Scan Document**. The Oracle Distributed Document Capture client launches.

Notice that the URL reflects the settings you specified to run the client. It also passes the scan profile, scan action (1 = Scan and 2 = Import), and index data consisting of the Siebel entity and its value (for example, xsiebelContact=1LS-AF98).

3. Within the Oracle Distributed Document Capture client, review, index, and send the document's batch.
4. Return to the Managed Attachments iFrame and click Refresh. The newly scanned document or imported scanned image file should be displayed in the list. (It may take a few minutes to be displayed.)

## 2.6 Passing Extra Metadata Parameters From Siebel to UCM

As part of an adapter configuration, you may want to pass one or more metadata values from Siebel to UCM for populating New and Scan button URLs within the Siebel iFrame. For example, whenever a user checks in a new document via the New or Scan button, you might pass a Siebel account name for use in check-in.

Here's how it works:

- To pass values, you need a Siebel field and a UCM metadata field.
- Two configuration variables are provided: one for new documents and the other for scanning documents. You set these variables to the metadata field(s) you want to populate on the UCM side.
- You add arguments to the symbolic URL (with the prefix *extra* added to the variable name) that link the Siebel and UCM fields, so that they are appended to the New or Scan button URL. When the iFrame is displayed, the application searches the URL for extra parameter variables and uses their assigned values to populate New or Scan button actions.
- Depending on configuration, extra values being passed may be visible or hidden from users checking in or scanning documents. For example, you may want to hide an account number, but for another value, you might populate a dropdown field and allow users to change the value.

### 2.6.1 Configure UCM for Extra Parameters

Follow these steps to configure extra parameters on the UCM side.

1. Ensure that the *SiebelSearchExtraParams* component is installed and enabled. See ["Install and Enable the Adapter UCM Components"](#) on page 2-3.
2. Set the *extraSiebelDocParams* and *extraSiebelScanParams* configuration variables.

Specify the UCM field(s) you want to populate. Define *extraSiebelDocParams* to pass values via the New button, and *extraSiebelScanParams* to pass values via the Scan button. For information about configuration variables, see ["Set the Configuration Variables"](#) on page 2-5.

For example, to populate the UCM Account metadata field for new and scanned documents, you would specify the following:

- `extraSiebelDocParams=dDocAccount`
- `extraSiebelScanParams=dDocAccount`

---

---

**Note:** If specifying multiple UCM fields for a variable, separate them with a comma. For example:

```
extraSiebelDocParams=dDocAccount,xsiebelOrder  
extraSiebelScanParams=dDocAccount,dDocType
```

---

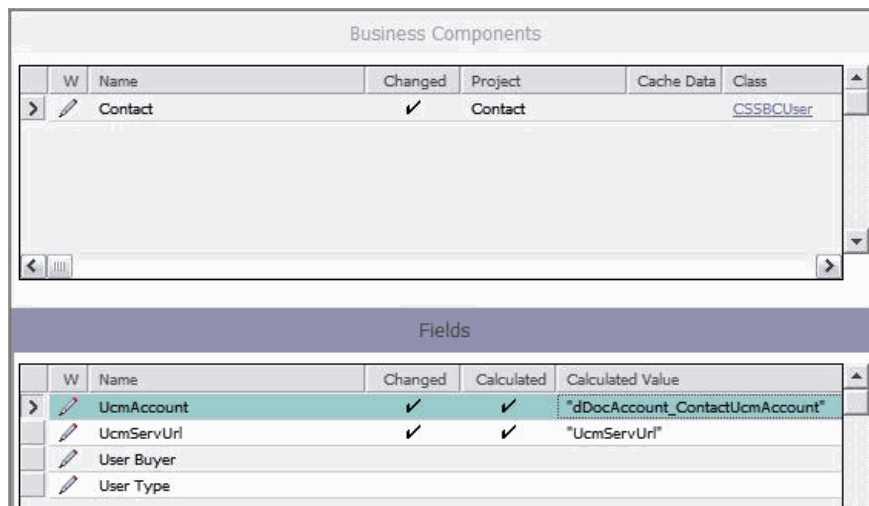
---

3. Update profiles as needed to accommodate the passed values (without the *extra* prefix).
  - If passing values via the New button, update the UCM content profile to display the metadata field you specified, if needed.
  - If passing values via the Scan button, update the scan profile if you want to display the index field. (The index field must exist for the file cabinet being used.) In the commit profile, map the index field to the appropriate UCM metadata field.

## 2.6.2 Configure Siebel for Extra Parameters

Follow these steps to configure extra parameters on the Siebel side.

1. Add a Siebel field to hold the value you want to pass. For example, you might add a field called *UcmAccount* to the Contact business component, as shown below.



2. On the symbolic URL, add an argument for the field you created in step 1, including the *extra* prefix (*extradDocAccount* in the example below, which is the UCM metadata variable name of *dDocAccount* with the *extra* prefix).

>	UcmServUrl	http://10.177.254.70	InsideApplet	IFrame
	UsageAcceleratorD	http://NQHOST/Ana [AnalyticsServerNa	Default	IFrame
	UsageAcceleratorD	/demo/ana/unavailat	DoNothing	
	UsageAcceleratorD	http://NQHOST/Ana [AnalyticsServerNa	Default	IFrame
	UsageAcceleratorD	/demo/ana/unavailat	DoNothing	
	UsageAcceleratorD	http://NQHOST/Ana [AnalyticsServerNa	Default	IFrame

Symbolic URL Arguments						
Name	Required Argume	Argument Type	Argument Value	Append as	Substit	Sequen
> extradocAccount	✓	Field	UcmAccount	✓		6
IdcService	✓	Constant	GET_SEARCH_RESI	✓		1
ResultTemplate	✓	Constant	SIEBEL_SEARCH	✓		2
coreContentOnly	✓	Constant	1	✓		3
siebelEntityField	✓	Field	SiebelEntityName	✓		4
siebelEntityValue	✓	Field	Id	✓		5
QueryText	✓	Field	QueryText	✓		7

3. Compile the business component.

## 2.7 Customizing the Siebel Adapter iFrame Display

You can customize the Siebel Adapter in the following ways:

- ["Add Custom Buttons"](#) on page 2-22
- ["Dynamically Change the Display Mode"](#) on page 2-23
- ["Change Display Colors"](#) on page 2-26
- ["Localize the User Interface"](#) on page 2-26

### 2.7.1 Add Custom Buttons

Follow these steps to add a custom button to the iFrame to implement an additional function.

1. Using Component Manager, create a custom component. Create an include resource that overrides the following resource includes:
  - `js_custom_siebel_functions`
  - `custom_configurable_btn_bar`
  - `js_custom_configurable_btn_bar`
2. After applying these resource includes, enable the component in UCM.

#### **js\_custom\_siebel\_functions**

The `super.js_custom_siebel_functions` must be included for the main button bar to display. This include adds a javascript listener attached to the custom button. The `YAHOO.oracle.ucm.adapter.extension` is the YUI namespace which helps in detecting and preventing name conflicts.

```
<@dynamichtml js_custom_siebel_functions@>
  <$include super.js_custom_siebel_functions$>

  <script type="text/javascript">
    //namespace definition
    YAHOO.namespace("YAHOO.oracle.ucm.adapter.extension");

    /**
     * Function for custom functionality added to the existing adapter.
     *
     */
    YAHOO.oracle.ucm.adapter.extension.customFunctionListener=function(){

      //custom code goes in here
      alert("You have your custom functionality running");

    };
  </script>
<@end@>
```

**custom\_configurable\_btn\_bar**

The super include must be present. This code makes the button appear in the user interface.

```
<@dynamichtml custom_configurable_btn_bar@>
    <${include super.custom_configurable_btn_bar$}>
    <a id="customBtn"
href="http://aseng-wiki.us.oracle.com/asengwiki/pages/editpage.action#" >Custom
Button</a>&nbsp;  
<@end@>
```

**js\_custom\_configurable\_btn\_bar**

This code associates the listener function with the button code.

```
<@dynamichtml js_custom_configurable_btn_bar@>
    <${include super.js_custom_configurable_btn_bar$}>

YAHOO.util.Event.addListener("customBtn", "click", YAHOO.oracle.ucm.adapter.extension.customFunctionListener);
<@end@>
```

**2.7.2 Dynamically Change the Display Mode**

As an option, you can configure a special display mode that dynamically overrides the default display configuration settings, hiding one or more buttons and disabling one or more icons. For example, when users are viewing a specific Siebel record type, such as Orders, you might hide the New and Scan buttons to prevent them from adding new attachments to orders, and disable the Edit icon so they can view but not edit order related attachments.

Here's how it works:

- By default, no dynamic display mode is configured. Under normal default settings, buttons in the iFrame are displayed according to their configuration variable settings (see "[Set the Configuration Variables](#)" on page 2-5). Columns are displayed according to the user's field configuration settings (see "[Configure Fields for Display Screen](#)" on page 3-10), and if columns are displayed, their icons are always functional.
- A parameter called *SiebelDisplayMode* sets the alternate display mode's combination of disabled buttons and icons. When set, this parameter overrides the other configuration variables (for example, AdapterAppCheckinBtn=true). The SiebelDisplayMode parameter is an integer that you calculate. During display, the integer is translated to dynamically determine the button and icon status.
- You activate the alternate dynamic display mode by configuring a secondary symbolic URL for the iFrame and specifying the SiebelDisplayMode parameter within it. Then, for business objects that require the alternate display mode, you change the symbolic URL to point to the secondary symbolic URL.

### 2.7.2.1 Calculate the SiebelDisplayMode Integer

Each button and icon is assigned an integer value, as shown in [Figure 2-5](#) and listed in [Table 2-4](#). Calculate the display mode integer by adding together the integer value of each button and icon you want to disable.

For example, suppose you want to disable the Edit and Properties icons and hide the New, Scan, Detach, and Configure buttons. You would calculate the SiebelDisplayMode value as follows:

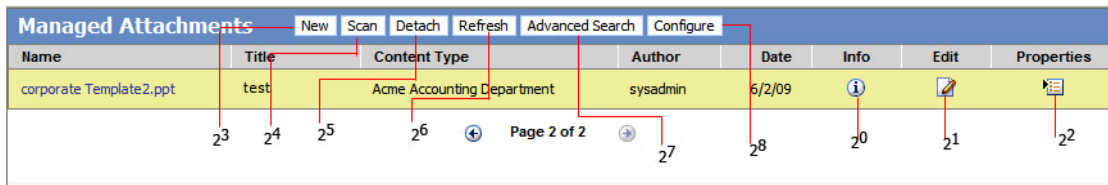
$$2^1 + 2^2 + 2^3 + 2^4 + 2^5 + 2^8 = 318$$

---

**Note:** Setting the SiebelDisplayMode value to 0 displays all buttons and enables all icons, overriding any specified values in the config.cfg file.

---

**Figure 2-5** Integer Values for Calculating a Display Mode Integer



**Table 2-4** Integer Values for Calculating a Display Mode Integer

Button or Icon	Integer Value
Info Icon	2 <sup>0</sup>
Edit Icon	2 <sup>1</sup>
Properties Icon	2 <sup>2</sup>
New Button	2 <sup>3</sup>
Scan Button	2 <sup>4</sup>
Detach Button	2 <sup>5</sup>
Refresh Button	2 <sup>6</sup>
Advanced Search Button	2 <sup>7</sup>
Configure Button	2 <sup>8</sup>

---

**Note:** To hide custom buttons, see ["Calculate Values for Custom Buttons"](#) on page 2-25.

---



### 2.7.2.2 Configure Siebel for Special Display Mode

After calculating a display mode integer, as described in ["Calculate the SiebelDisplayMode Integer"](#) on page 2-24, follow these steps to configure the alternate display mode.

- In the Siebel Web Client, configure a secondary symbolic URL for the iFrame.
  - Enter a new name for the URL (for example, UcmServUrl2) and select the same settings as the original URL. For more information, see ["Configure the iFrame URL in the Siebel Web Client"](#) on page 2-10.
  - Include an additional argument that specifies the SiebelDisplayMode parameter as shown below and in the illustration that follows:

Name	Required Argument	Argument Type	Argument Value	Append as Argument	Substitute in Text	Sequence #
SiebelDisplayMode	N	Constant	<Integer corresponding to display mode>	Y	N	12

The screenshot shows a table titled "Symbolic URL Arguments" with a menu bar containing "Menu", "New", "Delete", and "Query". The table has the following columns: Name, Required Argument, Argument Type, Argument Value, Append as, Substit, and Sequen. The row for "SiebelDisplayMode" is highlighted in yellow and shows a checkmark in the "Required Argument" column, "Constant" for "Argument Type", "318" for "Argument Value", a checkmark in the "Append as" column, and "12" for "Sequen". Other rows include "IdcService", "ResultTemplate", "coreContentOnly", "siebelEntityField", "siebelEntityValue", and "QueryText", all with checkmarks in the "Required Argument" column.

- For business objects that require the alternate display mode, change the symbolic URL to point to the secondary symbolic URL.

### 2.7.2.3 Calculate Values for Custom Buttons

If you have added custom buttons to the iFrame (as described in ["Add Custom Buttons"](#) on page 2-22) and want to hide them in an alternate display mode, you need to include their values in the integer calculation.

The following resource adds the buttons (custombtn1 and custombtn2) to the EnumObj javascript object and the framework calculates their values at runtime:

#### js\_custom\_button\_visibility\_handler

```
<@dynamichtml js_custom_button_visibility_handler@>
  <$include super.js_custom_button_visibility_handler$>
    NAME_ENUM.CUSTOMBTN1="CUSTOMBTN1",
    NAME_ENUM.CUSTOMBTN2="CUSTOMBTN2",
    EnumObj.add(NAME_ENUM.CUSTOMBTN1, "customBtn1", IMG_ENUM.BUTTON);
    EnumObj.add(NAME_ENUM.CUSTOMBTN2, "customBtn2", IMG_ENUM.BUTTON);
<@end@>
```

The following illustration displays the custom buttons and their calculated values:

Managed Attachments								New	Scan	Detach	Refresh	Advanced Search	Configure	Custom Button1	Custom Button2
Name	Title	Content Type	Author	Date	Info	Edit	Properties								
corporate Template2.ppt	test	Acme Accounting Department	sysadmin	6/2/09											
				Page 2 of 2	29	210									

### 2.7.3 Change Display Colors

Follow these steps to change the following colors in the iFrame:

- background
  - highlighted row
  - hover row
1. Create a component and override the following resource includes:
    - `css_adapter_background_styling`
    - `css_adapter_row_styling`

#### css\_adapter\_background\_styling

In the lines below, specify another background color for the `adapterBackgroundColor` idoc variable (hex code recommended). The super include line must be present.

```
<@dynamichtml css_adapter_background_styling@>
  <$adapterBackgroundColor="#346a2a"$>
  <$include super.css_adapter_background_styling$>
<@end@>
```

#### css\_adapter\_row\_styling

In the lines below, change the row colors by specifying different colors for the `selectedRowColor` and `highlightedRowColor` idoc variables. The super include line must be present.

```
<@dynamichtml css_adapter_row_styling@>
  <$selectedRowColor="#eac5a6"$>
  <$highlightedRowColor="#bdc1a3"$>
  <$include super.css_adapter_row_styling$>
<@end@>
```

### 2.7.4 Localize the User Interface

This section provides information about localizing the iFrame for other languages.

Resource files for internationalized strings are located within the `resources/lang` folder in a Components folder. For example, English resources files are located in the `resources/lang/en` folder. To add a new language, create resource files within the `resources` folder (for example, for German, the folder would be `resources/lang/de`) and modify the corresponding strings for that language.

---



---

**Note:** RTL (Right to Left) locales such as Arabic are not supported for this version of the Siebel adapter.

---



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## 2.8 Uninstalling the Adapter

Follow the steps listed in these sections to uninstall the adapter:

- ["Uninstall Adapter Components on Content Server"](#) on page 2-27
- ["Uninstall Siebel Components"](#) on page 2-28

### 2.8.1 Uninstall Adapter Components on Content Server

Follow these steps to disable and then uninstall the following adapter components on the Content Server.

- SiebelEcmIntegration
- SiebelIntegrationSearchDisplay
- SiebelSearchExtension
- SiebelSearchExtraParams

(For details about these components, see ["Install and Enable the Adapter UCM Components"](#) on page 2-3.)

1. Log in to Content Server as an administrator.
2. Select **Admin Server** from the Administration menu.  
The Content Admin Server page is displayed.
3. Click the name of the Content Server instance where the component will be uninstalled.  
The Content Admin Server <instance\_name> page is displayed.
4. Click **Component Manager**.  
The Component Manager page is displayed.
5. Select a Siebel component in the Enabled Components list and click **Disable**.
6. Repeat step 5, selecting and disabling the remaining Siebel components.
7. Click **Start/Stop Content Server**.  
The Content Admin Server <instance\_name> is displayed.
8. Click **Restart**.
9. Click **Component Manager**.  
The Component Manager is displayed.
10. Select a Siebel component in the Uninstall Component field and click **Uninstall**.  
Click **OK** to confirm uninstalling the component.
11. Repeat step 10, uninstalling the remaining Siebel components.
12. Select the link to return to the Component Manager.  
The Component Manager page is displayed.
13. Click **Start/Stop Content Server**.  
The Content Admin Server <instance\_name> page is displayed.
14. Restart Content Server to apply the changes.

## 2.8.2 Uninstall Siebel Components

Uninstalling Siebel adapter components includes *activating* the default Siebel File Attachment Applets that were disabled during adapter configuration, and *deactivating* the applets the SIF file added for the adapter configuration. See "[Activating or Deactivating Siebel Objects](#)" on page A-6.

---

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## Managed Attachments Functionality

This chapter provides information on options available to Siebel users in the Managed Attachments iFrame configured via the Siebel adapter. It includes the following sections:

- ["Managed Attachments Procedures"](#) on page 3-1
- ["Managed Attachments Screens"](#) on page 3-7

### 3.1 Managed Attachments Procedures

This section describes how to perform the following tasks using the Managed Attachments iFrame and its screens:

- ["Checking In and Attaching a Document"](#) on page 3-1
- ["Detaching a Document"](#) on page 3-2
- ["Configuring Fields for Display"](#) on page 3-2
- ["Viewing a Document's Information"](#) on page 3-3
- ["Editing a Document in its Native Application"](#) on page 3-3
- ["Opening or Saving a Document"](#) on page 3-3
- ["Updating a Document's Metadata"](#) on page 3-3
- ["Attaching a UCM Document to Multiple Siebel Records"](#) on page 3-4
- ["Deleting a Document on Content Server"](#) on page 3-4
- ["Searching for Documents on Content Server"](#) on page 3-4
- ["Scanning Via Oracle Distributed Document Capture"](#) on page 3-5

For more information about Content Server procedures, see the *Content Server User Guide*.

#### 3.1.1 Checking In and Attaching a Document

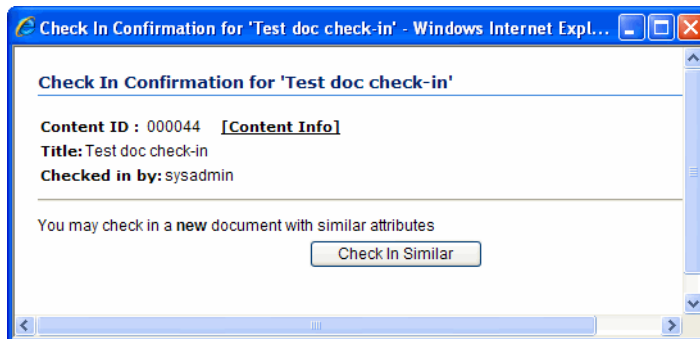
Follow these steps to check in a document and attach it to the selected Siebel record.

1. In the Managed Attachments iFrame, click the **New** button.
2. Complete the fields on the [Content Check In Form](#).

Specify the file to attach in the **Primary File** field by clicking the Browse button and selecting a file.

3. Click the **Check In** button.

Content Server options are displayed and a message confirms that the document was checked in. A button called **Check In Similar** allows you to check in another document using the same metadata values.



4. Close the Check In Confirmation screen.
5. In the Managed Attachments iFrame, click **Refresh** to display the newly checked in attachment.

### 3.1.2 Detaching a Document

Follow these steps to detach a document from the selected Siebel record. Detaching a document removes the link to the Siebel record, but does not delete the document from the Content Server. (Also see "[Deleting a Document on Content Server](#)" on page 3-4.)

1. In the Managed Attachments iFrame, select the row corresponding to the attachment you want to detach from the selected Siebel record.
2. Click the **Detach** button.
3. A message prompts you to verify that you want to detach the document. Click **OK**.

A message confirms that the document was successfully detached. After you close the message, the attachment list is automatically refreshed, with the detached document no longer listed in the iFrame.

### 3.1.3 Configuring Fields for Display

Follow these steps to select and order fields for display in the Managed Attachments iFrame.

1. In the Managed Attachments iFrame, click the **Configure** button.
2. On the [Configure Fields for Display Screen](#), specify fields to display by selecting them in the Available Fields area (holding down the Ctrl key to select multiple fields) and clicking the right arrow button to move them to the Main Information area. (Fields selected for display are displayed in dimmed text in the Available Fields area.)

3. Change the order in which fields are displayed by repositioning them in the Main Information area. Move a field by selecting it and clicking the up or down arrow button.

---

---

**Note:** If needed, click the **Reset** button to restore the default field display and order.

---

---

4. Click the **Apply** button and view the iFrame to see the results of your changes.
5. When done, click the **Save and Exit** button, and close the Configure Fields for Display screen.

### 3.1.4 Viewing a Document's Information

Follow these steps to view an attached document's metadata values or previous revisions

1. In the Managed Attachments iFrame, click the **Info** icon (displayed in the Info column) for a selected attachment.
2. View details about the document on the [Content Information Screen](#).

### 3.1.5 Editing a Document in its Native Application

Follow these steps to edit a document on the Content Server. Note that you must have access to the native application.

1. In the Managed Attachments iFrame, click the **Edit** icon for a selected attachment. (The Edit icon is displayed only for documents that can be edited in this way.)
2. The document opens in its native application. Make changes and save the document.

When you open the document using this method, it is automatically checked out. When you save the document in its native application, it is automatically checked back in as a new revision.

### 3.1.6 Opening or Saving a Document

Follow these steps to open a document in a Web-viewable format or save the document in its native format to a selected location such as a local computer. Note that changes you make to a document in this way are not saved on the Content Server; instead, see "[Editing a Document in its Native Application](#)" on page 3-3.

1. In the Managed Attachments iFrame, click a selected document's link in the **Name** field. A File Download dialog box is displayed with options to open or save the file.
2. Click **Open** or **Save**.

### 3.1.7 Updating a Document's Metadata

Follow these steps to make changes to a selected document's metadata values.

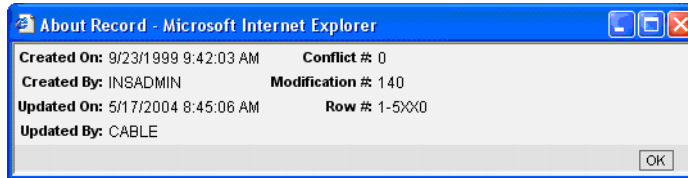
1. In the Managed Attachments iFrame, click the **Properties** icon for a selected attachment.
2. Make changes to the document's metadata values on the [Info Update Form](#).
3. Click the **Submit Update** button.

### 3.1.8 Attaching a UCM Document to Multiple Siebel Records

You can attach a single UCM document to multiple Siebel records. For example, you might attach a legal document to several contacts from the same organization. To do so, you must first attach the UCM document to a Siebel record and then manually add the record keys of additional Siebel records to link them with the UCM attachment.

1. Note the key for each Siebel record you want to link to the UCM document.

To find a record's key in the Siebel application, right-click the title bar of the Siebel record's primary pane and choose **About Record**. In the dialog box displayed, note the key listed after **Row #**.



2. On the Managed Attachments iFrame, click the **Properties** icon for the UCM document.
3. Under **Attach to Siebel Entities** fields on the Info Update form, enter a Siebel record key in the field corresponding to the record's type, and click the green plus sign. (For example, for a contact record, enter a Siebel record key in the Contact field and click its plus sign.) Repeat this step to link additional Siebel records to the attachment.

### 3.1.9 Deleting a Document on Content Server

Follow these steps to remove a document from the Content Server and also detach it from the Siebel record. To detach a document only (remove its link to the selected Siebel record without deleting it from the Content Server), see ["Detaching a Document"](#) on page 3-2.

1. In the Managed Attachments iFrame, click the **Info** icon for a selected attachment.
2. Under Actions options, click the **Delete** link for the revision you want to delete. You will be prompted to confirm the deletion.

### 3.1.10 Searching for Documents on Content Server

Follow these steps to search for documents on the Content Server.

1. In the Managed Attachments iFrame, click the **Advanced Search** button.
2. Specify search criteria on the [Expanded Search Form](#).

By default, the search is limited to attachments to the selected Siebel record. If viewing a Siebel contact record, for example, the Siebel entity value is displayed in the Contact field. To widen the search beyond documents attached to the selected Siebel record, remove the Siebel entity identifier.

For example, to search for a document by its name, you might select **Starts** in the Title field and enter the first portion of its name in the adjacent field.



3. Click the **Search** button. Search results are listed.

---

**Note:** Depending on the iFrame configuration, you may have full or limited access to Content Server and its features. For more information about its features, click the **quick help** link or see the Content Server documentation.

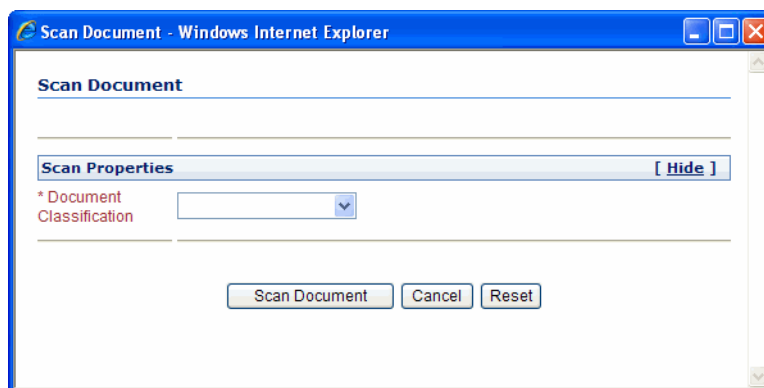
---

### 3.1.11 Scanning Via Oracle Distributed Document Capture

The Managed Attachments iFrame provides a Scan button that, when configured, launches the Oracle Distributed Document Capture application and allows you to either scan a document using a TWAIN compliant scanner or import a scanned image file from disk. After reviewing, editing, and indexing the document, click the **Send** button, which transfers it from Oracle Distributed Document Capture to UCM and attaches it to the selected Siebel entity.

Follow these steps to scan or import a document.

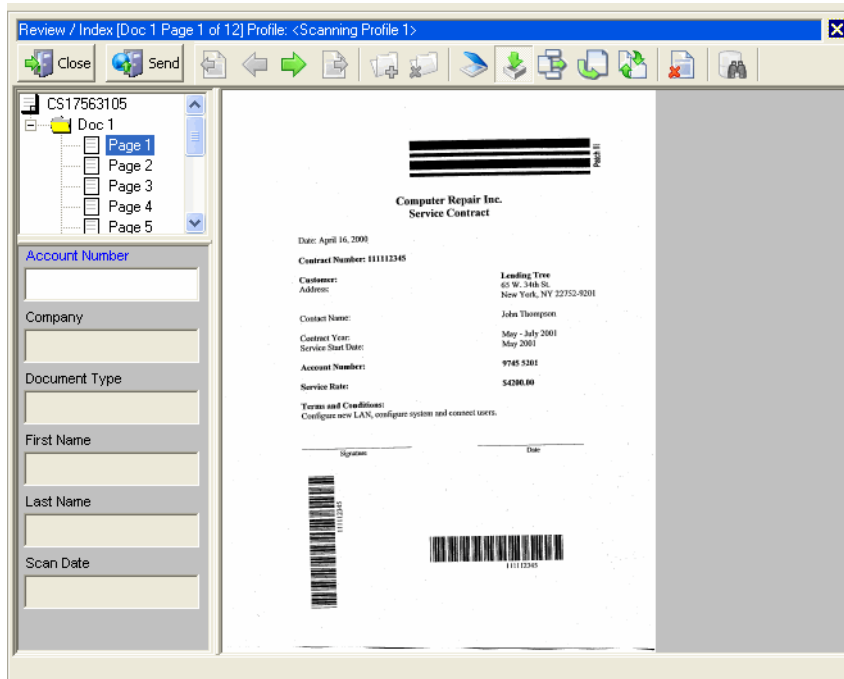
1. If scanning documents, place the documents in the feeder tray of the scanner.
2. In the Managed Attachments iFrame, click the **Scan** button. The Scan Document screen is displayed.



3. Select a classification in the **Document Classification** field.
 

This identifies the type of document to be scanned or imported. For example, you might choose a document classification of *Identity Documents* to scan a photocopy of a driver's license or passport.
4. Click the **Scan Document** button. The Oracle Distributed Document Capture client application launches and displays options based on whether the selected document classification is configured for scanning or importing.
  - If set for *scanning*, the scanner scans the pages you placed in the feeder and displays them in the Review/Index screen shown in [Figure 3-1](#), ready for you to review and index them. (All pages are scanned and stored in one document in the batch.)
  - If set for *importing*, a File Import screen is displayed, prompting you to select one or more scanned image files to import. After you select files, their pages are displayed in the Review/Index screen shown in [Figure 3-1](#), ready for you to review and index. (All files are imported into a single document in a single batch.)

**Figure 3–1 Review/Index screen in Oracle Distributed Document Capture**



5. In the Review /Index screen, review, edit, and index the document. For information, see the *User's Guide for Oracle Distributed Document Capture*. Follow these guidelines:
  - You can add pages to documents, but should not add documents to the batch.
  - Index fields are displayed in the lower side pane. Index fields provide values that are stored as metadata with the UCM document. An asterisk is displayed before the names of required index fields.
  - All pages in a document have the same index values. Changing the values on one page changes them for all pages in the document.
6. When done, click **Send** to transfer the document to UCM and attach it to the Siebel record. When asked to confirm sending the batch, click Yes.

---

**Note:** If required index fields are not complete, you are prompted to complete them in order to send the batch.

---

The client displays batch send results.

7. Close the Batch Send Results and Oracle Distributed Document Capture screens.
8. In the Managed Attachments iFrame, click the **Refresh** button to display the newly scanned or imported document now attached to the selected Siebel record. Note that it may take a few minutes for the generated document to be displayed.

## 3.2 Managed Attachments Screens

The Adapter screens include:

- "Managed Attachments iFrame" on page 3-7
- "Content Check In Form" on page 3-9
- "Configure Fields for Display Screen" on page 3-10
- "Content Information Screen" on page 3-11
- "Info Update Form" on page 3-13
- "Scan Document Screen" on page 3-14
- "Expanded Search Form" on page 3-15

### 3.2.1 Managed Attachments iFrame

Use the Managed Attachments iFrame to view, attach, scan, detach, and edit UCM documents attached to the selected Siebel record. You can also launch the UCM application, and activate its search options to locate UCM documents to which you have access.

The Managed Attachments iFrame is displayed within the Siebel record. It lists all UCM documents attached to the selected Siebel record, and provides the options listed in [Table 3–1](#).

Managed Attachments								
<a href="#">New</a> <a href="#">Scan</a> <a href="#">Detach</a> <a href="#">Refresh</a> <a href="#">Advanced Search</a> <a href="#">Configure</a>								
Name	Title	Author	Size	Date	Content Type	Info	Edit	Properties
attachment012.doc	ID Doc 2449362	sysadmin	84 KB	6/24/09	Documents attached to Siebel Entities			
License 0010.tif	Application Photo 47851	sysadmin	1 KB	6/24/09	Documents attached to Siebel Entities			
attachment01.doc	Lic 419991	sysadmin	84 KB	6/24/09	Documents attached to Siebel Entities			
Directions.doc	Misc Doc	sysadmin	41 KB	6/24/09	Documents attached to Siebel Entities			

#### About the iFrame

- The default columns are described in [Table 3–1](#), although users can customize the columns displayed by clicking the **Configure** button, as described in ["Configuring Fields for Display"](#) on page 3-2.
- If the list of attachments is long, arrows for displaying previous and next pages are displayed at the bottom.
- You can resize the columns by hovering the cursor over the line between column headings; when it changes to a two-headed arrow, click and drag to increase or decrease the column's size. Column contents wrap to the next line.
- To sort the attachments list, click a column heading. A triangle is displayed after sorting to indicate ascending or descending order.
- Depending on settings, some of the functionality described in this section may not be available. For example, some buttons may not be displayed or some of the icons may be disabled (grayed out).

**Table 3–1 Managed Attachments iFrame Options**

Elements	Description
Name	Lists the native name (including extension) of each UCM document attached to the Siebel record. Click the document's link to open or save a Web-viewable rendition of the document.
Title	Displays the title of the attached UCM document, assigned at checkin.
Author	Identifies the person who checked in the file.
Size	Displays the size (KB/MB) of the attached UCM document.
Date	Displays the date on which the UCM document was last submitted to UCM.
Info	Click this icon to display detailed information and content actions for the selected document on the <a href="#">Content Information Screen</a> .
Edit	Click this icon to check out, open, and edit the attached UCM document in its native application.
Properties	Click this icon to update metadata values for the attached UCM document on the <a href="#">Info Update Form</a> .
New	Click this button to attach a UCM document to the selected Siebel record, by completing fields on the <a href="#">Content Check In Form</a> .
Scan	Click this button to scan or import a document and attach it to the Siebel record, as described in " <a href="#">Scanning Via Oracle Distributed Document Capture</a> " on page 3-5.
Detach	Click this button to detach the selected UCM document. Detaching removes the UCM document from the Siebel entity, but not from UCM.
Refresh	Click this button to update the Managed Attachments iFrame display.
Advanced Search	Click this button to search for files on the Content Server.
Configure	Click this button to select and order fields for display in the Managed Attachments iFrame on the <a href="#">Configure Fields for Display Screen</a> .

### 3.2.2 Content Check In Form

Use the Content Check In Form to check in documents to Content Server, assign them metadata values, and attach them to the selected Siebel record.

To display this form, click the **New** button in the [Managed Attachments iFrame](#).

The screenshot shows a web browser window titled "Content Check In Form for Siebel Attachment - Windows Internet Explorer". The form itself is titled "Content Check In Form for Siebel Attachment" and contains the following elements:

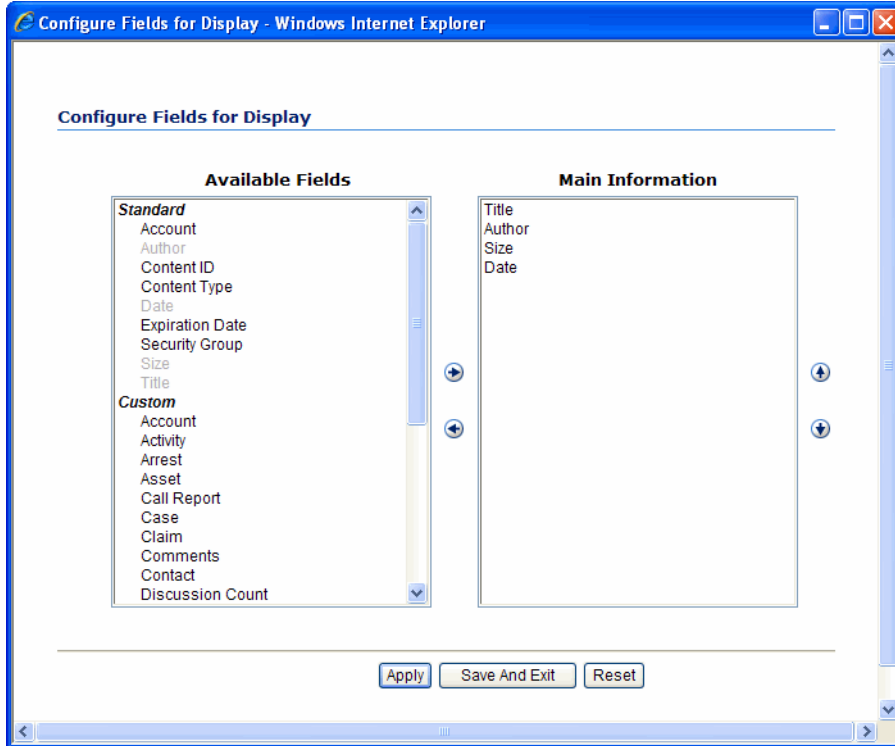
- Type:** A dropdown menu with "SiebelAttachment - Documents attached to Siebel Entities" selected.
- Title:** An empty text input field.
- Author:** A text input field containing "sysadmin" and a dropdown menu also showing "sysadmin".
- Security Group:** A dropdown menu with "Public" selected.
- Account:** Two empty text input fields.
- Primary File:** A text input field and a "Browse..." button.
- Metadata:** A section header with a "[ Hide ]" link.
- Comments:** A text area with up and down arrow buttons.
- Buttons:** "Check In" and "Reset" buttons at the bottom.

Elements	Description
Type	Select the option that best describes the file. The default document type for managed attachments is SiebelAttachment. This field is required.
Title	Enter a descriptive title for the document. This field is required.
Author	Identifies the person who checked in the file. This field is required.
Security Group	Select a security group for the file. Keep in mind that this file will be available to users who have permission to the specified security group. This field is required.
Primary File	Specify a primary file using one of these methods: <ul style="list-style-type: none"> <li>Click Browse next to the Primary File field. Navigate to and select the native file, and then click Open.</li> <li>Enter the complete path name and file name of the native file in the Primary File field (for example, c:/My Documents/ABC Project/MyFile.doc).</li> </ul> This field is required.
Comments	Enter any notes about the file.
Check In	Click this button to check in the specified document using the settings selected on this screen.
Reset	Click this button to cancel any entries and restore the default settings in this screen.

### 3.2.3 Configure Fields for Display Screen

The Configure Fields for Display screen allows Siebel users to specify the attachment information they want displayed in the iFrame.

Users display this screen by clicking the **Configure** button in the [Managed Attachments iFrame](#).



Elements	Description
Available Fields	Lists fields available for display in the iFrame. Click the right arrow to move a selected field to the Main Information area. Fields selected for display are shown in dimmed characters.
Main Information	Lists fields selected for display in the iFrame. Fields are displayed left to right in the order in which they are listed in this area. Click the up or down arrow button to reposition a selected field.
Apply	Click this button to preview your changes in the Managed Attachments iFrame screen. (You may need to temporarily reposition the Configure Fields for Display screen to view iFrame changes.)
Save And Exit	Click this button to save changes to the display configuration and return to the Managed Attachments iFrame.
Reset	Click this button to cancel any changes and restore the default system field display.

### 3.2.4 Content Information Screen

Use the Content Information screen to view details about the attached file, view its web-viewable or native version, and if needed, delete the document.

Users display this screen by clicking the **Info** button for a selected document in the [Managed Attachments iFrame](#).

**Content Information**

Content ID: 000157  
Revision: 1  
Type: SiebelAttachment - Documents attached to Siebel Entities  
Title: Siebel Integration Testing  
Author: sysadmin  
Comments:  
Trigger:  
Contact: 1LS-AF98  
Order:  
Account:  
Service Request:  
Call Report:  
Opportunity:  
Asset:  
Quote:  
Claim:  
Case:  
Evidence:  
Arrest:  
Incident:  
Offense:  
Group:  
Suspect:  
Lead:  
Activity:  
Project:  
Security Group: Public  
Account:  
Checked Out By:  
Status: Released  
Formats: Application/1

**Links**

Web Location: <http://10.141.125.114/dc8/groups/public/documents/siebelattachment/000157.1>  
Native File: [0000000U\\_1](#)  
Discussion: [Create Discussion](#)

Revision	Date	Expiration Date	Status	Actions
[ 1 ]	7/8/09 3:00 PM	None	Released	Delete

Elements	Description
Type	Displays the type that best describes the file. The default document type for managed attachments is SiebelAttachment.
Title	Displays the title of the attached UCM file, assigned at checkin.
Author	Identifies the person who checked in the file.
Security Group	An identifier that specifies access permission to the file.
Comments	Displays additional notes about the file.

<b>Elements</b>	<b>Description</b>
Siebel Entity Fields (Contact, Order, Account, Service Request, Call Report, Opportunity, Asset, Quote, Claim, Case, Evidence, Arrest, Incident, Offense, Group, Suspect, Lead, Activity, Project)	Displays fields for each Siebel record type. A Siebel record key is displayed in the field that corresponds to the Siebel record's type.
Checked Out By	Identifies the user who has the file checked out.
Status	Identifies the file's current status. A status of Released indicates that the revision is available in the Content Server.
Formats	Identifies formats for the file.
Web Location	Click this link to view a web-viewable rendition of the attached file.
Native File	Click this link to either save a copy of the file or open it in its native application.
Table	Lists revisions of the file, along with their release date, expiration date, and status. Click the Delete link to remove the corresponding revision.
Content Actions	Provides options for checking out the file, updating it, checking in a similar file, subscribing to the file, or checking out and opening the file.
E-mail	The Send Link by E-mail link opens a new e-mail message that contains a URL to the selected file.



### 3.2.5 Info Update Form

Use the Update Info Form to make changes to a selected document’s metadata values. Users search for documents on the Content Server by their metadata values, as described in "Searching for Documents on Content Server" on page 3-4.

Users display this form by clicking the **Properties** icon for a selected attachment in the [Managed Attachments iFrame](#).

The screenshot shows a web form titled "Info Update Form for 'Siebel Integration Testing'". The form contains the following fields and controls:

- Content ID:** 000157
- \* Type:** SiebelAttachment - Documents attached to Siebel Entities (dropdown)
- \* Title:** Identity attachment (text input)
- \* Author:** sysadmin (text input) and sysadmin (dropdown)
- \* Security Group:** Public (dropdown)
- Account:** (text input) and (dropdown)
- \* Revision:** 1 (text input)
- Comments:** (text area)
- Trigger:** (dropdown)
- Contact:** (text input) with a green plus icon and the value "1LS-AF98" next to it.
- Order:** (text input) with a green plus icon.
- Account:** (text input) with a green plus icon.
- Service Request:** (text input) with a green plus icon.
- Call Report:** (text input) with a green plus icon.
- Opportunity:** (text input) with a green plus icon.
- Asset:** (text input) with a green plus icon.
- Quote:** (text input) with a green plus icon.
- Claim:** (text input) with a green plus icon.
- Case:** (text input) with a green plus icon.
- Evidence:** (text input) with a green plus icon.
- Arrest:** (text input) with a green plus icon.
- Incident:** (text input) with a green plus icon.
- Offense:** (text input) with a green plus icon.
- Group:** (text input) with a green plus icon.
- Suspect:** (text input) with a green plus icon.
- Lead:** (text input) with a green plus icon.
- Activity:** (text input) with a green plus icon.
- Project:** (text input) with a green plus icon.
- Date:** 7/8/09 3:00 PM
- Expiration Date:** (text input) with a calendar icon.

At the bottom of the form are two buttons: "Submit Update" and "Reset".

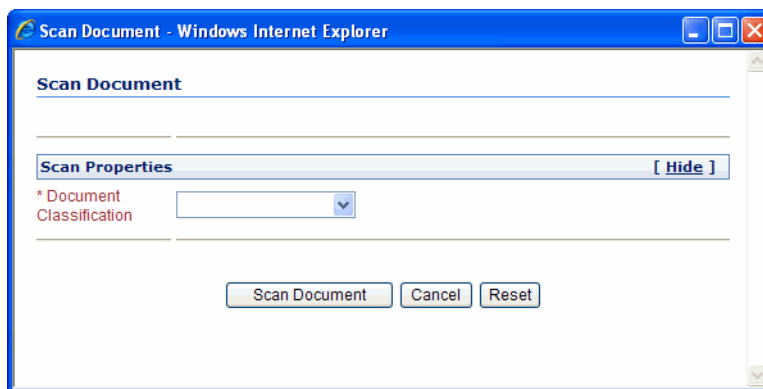
Elements	Description
Content ID	Displays the unique identifier assigned to the file.
Type	Select the option that best describes the file. The default document type for managed attachments is SiebelAttachment.

Elements	Description
Title	Enter a descriptive title for the document. By default, Content Server provides a prefix that identifies the Siebel entity attachment type, such as ContactAtt: for a document attached to a Contact entity. (This prefix is optional.)
Author	Identifies the user who checked in the current file revision.
Security Group	Specifies access permission to the file. You can enter text or select from the list of predefined values.
Revision	Identifies the revision number of the file. (You should change the revision only if there is a specific reason to do so.)
Comments	Enter any notes about the file.
Siebel Entity fields (Contact, Order, Account, Service Request, Call Report, Opportunity, Asset, Quote, Claim, Case, Evidence, Arrest, Incident, Offense, Group, Suspect, Lead, Activity, Project)	These fields identify the selected Siebel record, and link the attached file to the record. A record key is displayed in the field corresponding to the selected Siebel record's type.  The plus sign icons allow you to link multiple Siebel records to a UCM file. See " <a href="#">Attaching a UCM Document to Multiple Siebel Records</a> " on page 3-4.
Submit Update	Click this button to save the metadata changes to the attached file.
Reset	Click this button to cancel metadata changes and restore them to their values upon entering this form.

### 3.2.6 Scan Document Screen

Use the Scan Document screen to specify the type of document you want to scan or import, and then attach to the Siebel record.

Users display this screen by clicking the **Scan** button in the [Managed Attachments iFrame](#).



### 3.2.7 Expanded Search Form

This search screen enables you to search the Content Server for content. After specifying search criteria and clicking **Search**, the results are listed.

Users display this form by clicking the **Advanced Search** button in the [Managed Attachments iFrame](#).

Notice that the field corresponding to the siebel entity type you are viewing displays an ID value. For example, if viewing a Contact record, an ID value is displayed in the Contacts adjacent field. To widen the search beyond documents attached to the selected Siebel record, remove this entity value.

Depending on settings, this screen may provide full or limited access to Content Server functions. For example, you may or may not be able to save queries for later use.

The screenshot shows the 'Search: Expanded Form' interface in a Windows Internet Explorer browser window. The page title is 'Search: Expanded Form - Windows Internet Explorer'. The Oracle Content Server logo is visible at the top. The navigation menu includes 'Home', 'Search', 'New Check In', 'My Profile', and 'Help'. Below the navigation menu, there are tabs for 'My Content Server', 'Browse Content', 'Content Management', and 'Administration'. The main content area is titled 'Search: Expanded Form' and includes a 'quick help' link and a 'Search Forms' dropdown menu. There are three buttons: 'Search', 'Reset', and 'Save'. The 'Metadata Search' section contains a list of search criteria, each with a 'Matches' dropdown menu and an input field. The 'Contact' field is populated with the value '1LS-AF98'. The 'Date' and 'Expiration Date' fields have 'From' and 'To' date pickers. The 'Results Options' section at the bottom includes a 'Results Per Page' dropdown set to '20' and a 'Sort By' dropdown set to 'Date' with a 'Descending' sort order. There are also 'Search', 'Reset', and 'Save' buttons at the bottom.

<b>Elements</b>	<b>Description</b>
Content ID	Select an operator and search for the file's unique identifier.
Title	Select an operator and search for the file's title.
Type	Select an operator and search for the file's type.
Security Group	Select an operator and search for the file's security group.
Author	Select an operator and search for the person who checked in the file.
Date	Specify a date range and search for files released within the range.
Expiration Date	Specify a date range and search for files whose expiration date falls within the range.
Comments	Specify an operator and search for files by their comments.
Siebel Entity fields	Specify an operator and search for files by their Siebel record key.
Results Per Page	Determines the number of results that are displayed on the search results page.
Sort By	Determines which of the following options are used to sort the targeted search results, and whether or not those results are listed in ascending or descending (default) order: <ul style="list-style-type: none"> <li>■ Release Date (default)</li> <li>■ Title</li> </ul>
Search	Click this button to perform the search after specifying search criteria.
Reset	Resets the form.
Save	Click this button to save search criteria as a query for later use. (This field may not be available.)

---

---

## Siebel Object Locking

If you encounter issues when importing the SIF file and locking the Siebel Projects (see ["Lock Siebel Objects"](#) on page 2-7), you can lock Siebel objects individually. This appendix lists the Siebel objects (Projects, Applets, Views, and Business Components) locked during Siebel configuration (see ["Configuring the Adapter for Siebel"](#) on page 2-7).

Importing the SIF file deactivates certain Siebel applets. See ["Activating or Deactivating Siebel Objects"](#) on page A-6 for instructions in activating or deactivating Siebel applets, if needed.

This appendix includes the following sections:

- ["Objects Locked During SIF Import and Project Locking Process"](#) on page A-1
- ["Activating or Deactivating Siebel Objects"](#) on page A-6

### A.1 Objects Locked During SIF Import and Project Locking Process

Importing the SIF file and following the Siebel project locking process described in [Section 2.4.1](#) locks the following objects:

- ["Projects Locked"](#) on page A-2
- ["Applets Locked"](#) on page A-3
- ["Views Locked"](#) on page A-4
- ["Business Components Locked"](#) on page A-5

## A.1.1 Projects Locked

**Table A-1 Projects Locked (SIA and SEA)**

<b>Projects</b>	<b>SIA</b>	<b>SEA</b>
Account	X	X
Account SSE	X	X
Activity	X	X
Activity SSE	X	X
Asset Management	X	X
Contact	X	X
Contact SSE	X	X
ERM Unified Help Desk	X	X
FINS Call Reports	X	X
FINS Call Reports2	X	X
FINS Call Reports SSE	X	X
FINS INS Claims	X	X
FINS INS Claims Appraisals/Bills/Attachments	X	X
Oppty	X	X
Oppty SSE	X	X
Order Entry	X	X
PS Project Management	X	X
PS Project Management SSE	X	X
PUB Case	X	
PUB Evidence	X	
PUB HLS Incident	X	
PUB HLS Physical Terrorism	X	
PUB Lead	X	
Quote	X	X
Quote UI	X	X
Service	X	X
Service SSV	X	X
VERT CUT Common	X	X

## A.1.2 Applets Locked

**Table A-2 Applets Locked**

<b>Applets</b>	<b>SIA</b>	<b>SEA</b>
Activity Form Applet	X	
Agent Service Request Detail Applet	X	X
Asset Mgmt - Asset Detail Applet	X	X
Asset Mgmt - Asset Detail Applet - Header	X	X
Contact Form Applet	X	X
FINCORP Call Report Form Applet (Short)	X	X
HLS Case Form Applet	X	
HLS Group Form Applet	X	
HLS Suspect Form Applet - Header	X	
INS Claims Form Applet	X	X
Opportunity Form Applet - Child	X	X
Order Entry - Order Form Applet Dashboard	X	X
Order Entry - Order Form Applet Dashboard (Sales)	X	X
Project Entry Applet	X	X
PUB Arrest List Applet	X	
PUB Evidence Form Applet	X	
PUB HLS Incident Form Applet - Header	X	
PUB Lead Form Applet	X	
PUB Offense List Applet	X	
Quote Form Applet	X	X
Service Request Detail Applet	X	X
SIS Account Entry Applet	X	X

### A.1.3 Views Locked

**Table A-3 Views Locked**

<b>Views</b>	<b>SIA</b>	<b>SIA</b>
Account Attachment View	X	X
Activity Attachment View	X	X
Agent Service Request detail view w/attachments	X	X
Asset Mgmt - Asset Attachment View	X	X
Contact Attachment View	X	X
FINCORP Call Report - Attachments	X	X
HLS Case Attachment View	X	
HLS Groups Attachment View	X	
HLS Suspect Attachment View	X	
INS Claims Attachments View	X	X
Internal Asset Mgmt - Asset Attachment View	X	X
Opportunity Attachment View	X	X
Order Entry - Attachments View	X	X
Order Entry - Attachments View (Sales)	X	X
Project Attachment View	X	X
PUB Evidence Attachment View	X	
PUB HLS Incident Attachment View	X	
PUB Incident Arrest Attachments View	X	
PUB Incident Offense Attachments View	X	
PUB Lead Attachment View	X	
Quote Attachment View	X	X
Service Request detail view w/attachments	X	X



## A.1.4 Business Components Locked

**Table A-4 Business Components Locked**

<b>Business Components</b>	<b>SIA</b>	<b>SEA</b>
Account	X	X
Action	X	X
Asset Mgmt - Asset	X	X
Contact	X	X
FINCORP Call Report	X	X
HLS Case	X	
HLS Group	X	
HLS Suspect	X	
INS Claims	X	X
Opportunity	X	X
Order Entry - Orders	X	X
Project	X	X
PUB Evidence	X	
PUB Arrest	X	
PUB HLS Incident	X	
PUB Offense	X	
PUB Lead	X	
Quote	X	X
Service Request	X	X

## A.2 Activating or Deactivating Siebel Objects

Importing the SIF file deactivates certain Siebel applets (see [Table A.1.2](#)). If for some reason you need them to reactivate them, follow these steps.

1. In the Object Explorer, identify a View that holds the Managed Attachments Applet from the Web client. (Identify a View by selecting **About View** from the Help menu.)
2. Expand the View and select **View Web Template Item**. The list of Applets contained in the View is displayed.
3. Select an Applet from [Table A.1.2](#) and activate or deactivate as needed.
  - Activate an Applet by setting its Inactive Attribute to False.
  - Disable an Applet by setting its Inactive Attribute to True.