

Oracle® Fusion Middleware

Administrator's Guide for Oracle Siebel Adapter for Oracle
Enterprise Content Management

11g Release 1 (11.1.1)

E17045-01

May 2010

Oracle Fusion Middleware Administrator's Guide for Oracle Siebel Adapter for Oracle Enterprise Content Management, 11g Release 1 (11.1.1)

E17045-01

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Preface

The *Administrator's Guide for Oracle Siebel Adapter for Oracle Enterprise Content Management* describes Oracle Siebel solution configurations for Oracle Enterprise Content Management systems.

Audience

This document is intended for administrators configuring integration solutions between Oracle Siebel and Oracle Enterprise Content Management systems.

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Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	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.

This chapter covers the following topics:

- ["About This Guide"](#) on page 1-1
- ["About the Adapter"](#) on page 1-2
- ["Supported Siebel Entities"](#) on page 1-2
- ["System Architecture"](#) on page 1-3
- ["Managed Attachments Options"](#) on page 1-3
- ["User Authentication"](#) on page 1-4
- ["Document Security"](#) on page 1-4

1.1 About This Guide

This guide describes how to configure the Siebel Adapter for Oracle Universal Content Management (Oracle UCM). It includes the following sections:

- [Chapter 1, "Overview,"](#) lists supported Siebel entities and describes attachment options, authentication, and document security.
- [Chapter 2, "Configuring the Adapter,"](#) lists system requirements and describes how to configure Oracle UCM and Siebel for adapter use. It also describes optional configuration, such as scanning via Oracle Distributed Document Capture, passing additional metadata parameters from Siebel to Oracle UCM, and customizing the adapter iFrame display.
- [Appendix A, "Siebel Object Locking,"](#) lists Siebel objects locked during adapter configuration and instructions for activating or deactivating them.

1.2 About the Adapter

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

Managed Attachments								
New Scan Detach Refresh Page Advanced Search Configure								
Name	Title	Author	Vault File Size	Date	Info	Edit	Properties	
Test doc.doc	Misc Doc	weblogic	23 KB	3/8/10				
Info.gif	Directions	weblogic	18 KB	3/8/10				
License 0010.tif	Application Photo 47851	weblogic	30 KB	3/8/10				
attachment01.doc	Lic 419991	weblogic	11 KB	3/8/10				
attachment012.doc	ID Doc 244938	weblogic	16 KB	3/2/10				
Directions.doc	Misc Doc2	weblogic	44 KB	2/24/10				

1.3 Supported Siebel Entities

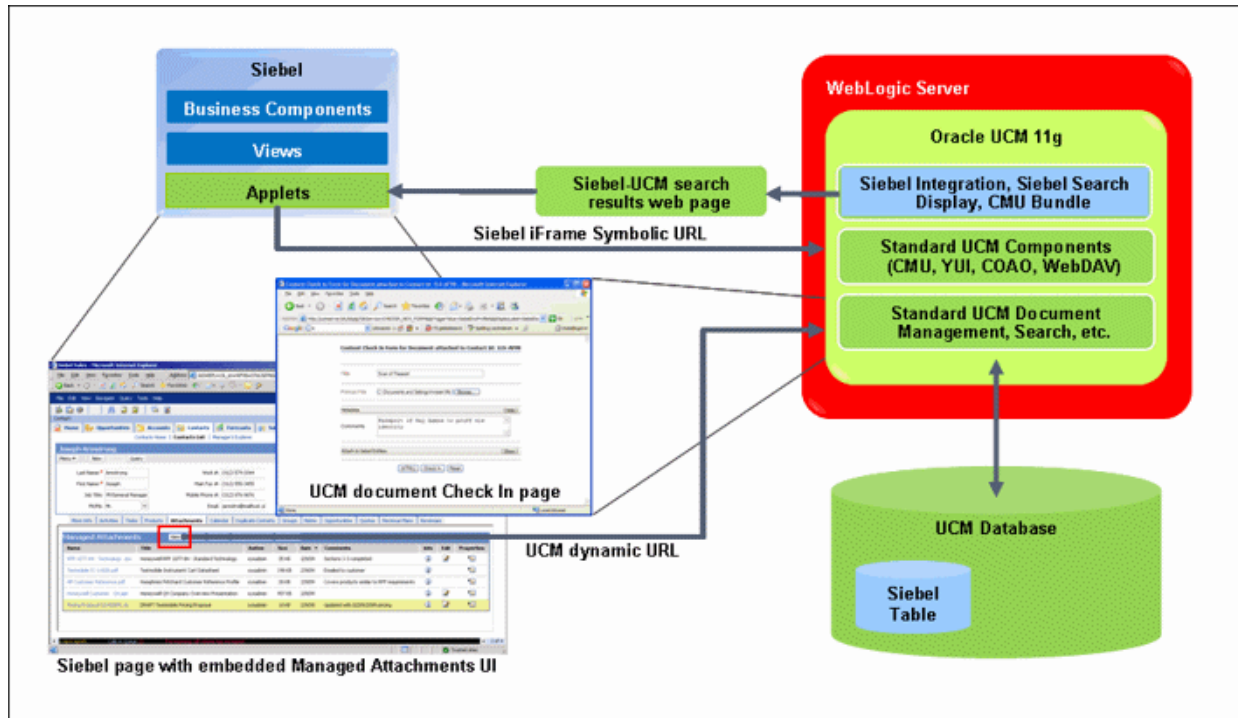
The Managed Attachments iFrame is supported for the following Siebel entities:

- 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

1.4 System Architecture

Figure 1-1 illustrates the iFrame configuration for the Siebel adapter.

Figure 1-1 System Architecture for iFrame Configuration for Siebel Adapter



1.5 Managed Attachments Options

When a Siebel user displays a Siebel record such as a contact, 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 using Oracle Distributed Document Capture, attaching them to a selected Siebel entity

For details about how users work with Oracle UCM documents in a Siebel application, see the *Oracle Fusion Middleware User's Guide for Oracle Enterprise Content Management Solutions for Oracle Siebel*.

1.6 User Authentication

Siebel users must have a Content Server account 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 Oracle Single Sign-On: If Siebel is not configured for single sign-on, the Oracle UCM single sign-on login prompt is displayed. (If Siebel is configured for single sign-on, the user has been authenticated, so no login prompt is displayed.)
- Content Server *not* configured for Oracle Single Sign-On: The Content Server login prompt is displayed, regardless of the selected Siebel authentication model.

1.7 Document 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.

Configuring the Adapter

This section covers the following topics:

- "System Requirements" on page 2-1
- "Configuring the Adapter for Oracle UCM" on page 2-2
- "Configuring the Adapter for Siebel" on page 2-5
- "Configuring Oracle Distributed Document Capture" on page 2-11
- "Passing Extra Metadata Parameters From Siebel to Oracle UCM" on page 2-17
- "Customizing the Siebel Adapter iFrame Display" on page 2-19
- "Uninstalling the Adapter" on page 2-23

2.1 System Requirements

The Siebel Adapter for Oracle UCM 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.
- Oracle UCM 11g Release 1 (11.1.1 or higher).
- If implementing scanning functionality, Oracle Distributed Document Capture Release 10.1.3.5 or higher.

In addition, the Oracle UCM 11g Commit Driver is required to commit documents from Capture to Oracle UCM. The commit driver is available at the following location, listed under *Oracle Document Capture 10g Commit Drivers*:

http://www.oracle.com/technology/software/products/content-management/index_dc.html

- Supported browser versions for the Siebel Adapter include Internet Explorer versions 7.x and 8.x.
- The Siebel Adapter supports the following Content Server search engines. For more information, see "Configure the iFrame URL in the Siebel Web Client" on page 2-8.
 - Metadata Only Search
 - Database – Full Text Search
 - Oracle Text – Full Text Search

2.2 Configuring the Adapter for Oracle UCM

The Oracle UCM configuration procedures include the following:

- "Verify Required Oracle UCM Components" on page 2-2
- "Upload and Import the Configuration Migration Utility Bundle" on page 2-2
- "Enable the Siebel Adapter Oracle UCM Components" on page 2-2
- "Set the Configuration Variables" on page 2-3

2.2.1 Verify Required Oracle UCM Components

Follow these steps to verify that required Oracle 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, enable it.
 - CheckoutAndOpenInNative
 - ConfigMigrationUtility
 - CoreWebdav
 - YahooUserInterfaceLibrary

2.2.2 Upload and Import 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. Select the **SiebelAdapterCMUBundle.zip** file, located in the following folder:
ECM_ORACLE_HOME/ucm/Distribution/SiebelEcmIntegration
5. Select the **Force overwrite** field.
6. Click **Upload**.
7. On the Configuration Bundles Page, select the **SiebelIntegrationCmuBundle** link. On the Configuration Migration Administration page, select the **Overwrites Duplicates** field. Select **Preview** from the item's Actions menu.
8. On the Import Preview page, select **Import** from the Actions field. (Note that you can ignore messages about skipped dependencies.)
9. Restart Content Server.

2.2.3 Enable the Siebel Adapter Oracle UCM Components

The following Oracle UCM components are provided with the adapter:

Table 2–1 Oracle UCM Components Provided in Siebel Adapter

Oracle 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"> ■ 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. ■ If not enabled, only released documents are displayed. <p>Note: 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 Oracle UCM through the New or Scan buttons. For instructions, see "Passing Extra Metadata Parameters From Siebel to Oracle UCM" on page 2-17. Specify parameters to pass as configuration variables, as described in "Set the Configuration Variables" on page 2-3.</p>

Follow these steps to enable the components using Component Manager.

1. Log in to Content Server as an administrator.
2. Select **Admin Server** from the Administration menu.
The Component Manager page is displayed.
3. Scroll to the **Integration** components section.
4. Select the **SiebelEcmIntegration** and **SiebelIntegrationSearchDisplay** components to enable them.
5. Optionally, select the **SiebelSearchExtension** and **SiebelSearchExtraParams** components. Note that you can disable these components at any time by deselecting them on this page.
6. Click **Update**.
7. Restart Content Server.

Note: For information about restarting methods, see the section on starting, stopping, and restarting Content Server in the *Oracle Fusion Middleware System Administrator's Guide for Universal Content Management*.

2.2.4 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. In the side pane, click the **General Configuration** link.
3. Scroll to the Additional Configuration Variables section, and edit the following entries. (These entries were automatically created when you imported the Configuration Migration Utility Bundle.)

Note: The default value for all true/false entries is TRUE, except for the AdapterAppDisplayLinks variable, whose default value is FALSE.

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 uses the default CSS file. Example Siebel 7.8 URL: http://siebelserver:port/files/main.css Example Siebel 8.x URLs: 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 using Oracle Distributed Document Capture. For configuration instructions, see " Configuring Oracle Distributed Document Capture " on page 2-11. This entry specifies the web address to Oracle Distributed Document Capture. Example entry: ODDCURLPath=http://xyz/webcapture.asp
ODDCScanAction=1 ODDCScanAction=2	Use to configure document attachment scanning and importing using Oracle Distributed Document Capture, as described in " Configuring Oracle Distributed Document Capture " on page 2-11. 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.
AdapterAppAdvSrchUCMUIVisible=true	Specifies if full Content Server user interface and search access is available when users click the Advanced Search button in the iFrame.
AdapterAppDisplayLinks=false	If needed, use this variable to replace icons in the iFrame with links, by changing the variable's value to true.
extraSiebelDocParams=parameter,parameter, parameter,...	Optionally specify additional parameters to be passed to the New button. See " Passing Extra Metadata Parameters From Siebel to Oracle UCM " on page 2-17. Example entry: extraSiebelDocParams=dDocAccount,xsiebelOrder
extraSiebelScanParams=parameter,parameter, parameter,...	Optionally specify additional parameters to be passed to the Scan button. See " Passing Extra Metadata Parameters From Siebel to Oracle UCM " on page 2-17. Example entry: extraSiebelScanParams=dDocAccount

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 2-20.

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-delimited list containing the default fields.

The additional column defaults are title, author, size, and date. To override these additional columns, populate this variable with comma-delimited Oracle UCM metadata field names. For example, the list might include:

```
dDocTitle, dDocType, dDocAuthor, dInDate
```

4. Restart Content Server.

2.3 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 2-6
- "[Import the SIF File](#)" on page 2-7
- "[Compile Locked Projects](#)" on page 2-7
- "[Configure the iFrame URL in the Siebel Web Client](#)" on page 2-8
- "[Test the Siebel Configuration](#)" on page 2-10

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, reactivate these applets to display Siebel File System attachments, such as

during a migration process. For information on activating and deactivating applets, see "Siebel Object Locking" on page A-1.

- When the Siebel Adapter for Oracle UCM is configured, Siebel attachments that customers have migrated from Siebel File Systems to Oracle UCM and previously accessed with Siebel EAI or EIM Web services are no longer available. However, these migrated documents could now be accessed using Oracle UCM Web services.

2.3.1 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 to be modified by the import.

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

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

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?
```

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.

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.

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

2.3.2 Import the SIF File

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

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.

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 option) from the Conflict Resolution options is selected, and click **Next**. (This option merges 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 prompts you to proceed. Click **Yes**.
6. A summary is displayed. Click **Finish**.

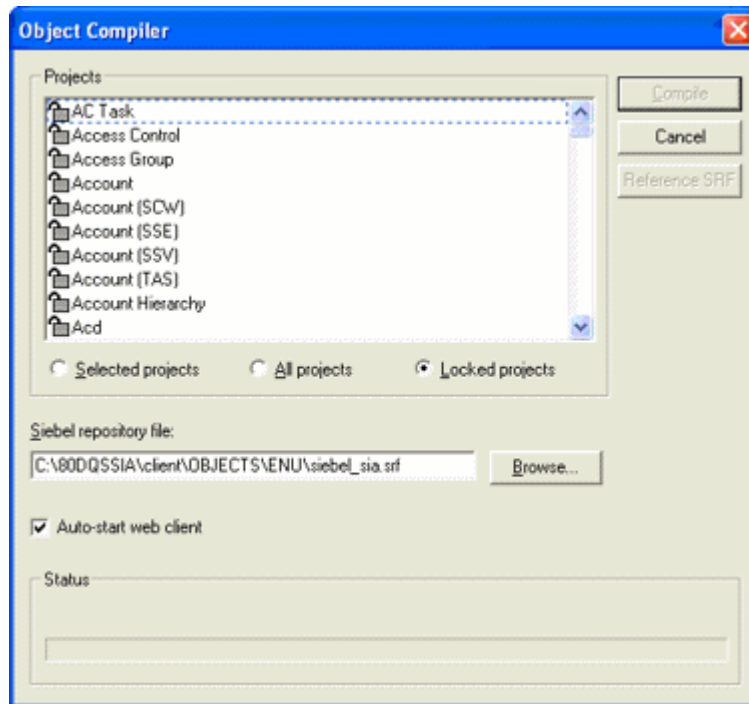
2.3.3 Compile Locked Projects

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.)

2.3.4 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 Oracle 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/_p/cc-embedded (example: http://ucm-server-name.domain:port-number /cs/idcplg/_p/cc-embedded)

Field	Value to Enter
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`

- 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.

An example Symbolic URL follows. (Note that this example URL is separated onto multiple lines for display purposes only, with argument names in bold for clarity.)

```
http://ucm-server-name.domain:port-number/cs/idcplg/_p/cc-embedded?
IdcService=GET_SEARCH_RESULTS_FORCELOGIN&
siebelEntityField=xsiebelContact&
siebelEntityValue=1LS-AF98&
QueryText=xsiebelContact+%3cmatches%3e+%601LS-AF98%60&
SearchQueryFormat=Universal&
ResultTemplate=SIEBEL_SEARCH&
coreContentOnly=1
SortField=dInDate&
SortOrder=Desc&
ResultCount=20&
```

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
SearchEngineName	N	Constant	DATABASE.METADATA	Y	N	10
ResultCount	N	Constant	6	Y	N	11
IFrameSRC	N	Command	IFrame Height=280 Width=100% (See "Configure the iFrame Height" on page 2-10.)	Y	N	12

Name	URL	Host Name	Fixup Name	Multivalue Treatr	SSD Disposition	Web Application Name
> UcmServUrl	http://ucm-server/ics/Idcplg/_p/cc-embedded		InsideApplet		IFrame	

Name	Required Argume	Argument Type	Argument Value	Append as Argun	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
SearchEngineName		Constant	DATABASE.METADATA	✓		10
ResultCount		Constant	6	✓		11
IFrameSRC		Command	IFrame Height=280 Width=100%	✓		12

2.3.4.1 Configure 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.

2.3.5 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 Oracle UCM side or the Siebel side, log a service request using My Oracle Support.

2.4 Configuring Oracle Distributed Document Capture

This section covers the following topics:

- ["About Document Scanning Using Oracle Distributed Document Capture"](#) on page 2-11
- ["Configure Oracle Distributed Document Capture For the Siebel Adapter"](#) on page 2-12
- ["Configure Oracle UCM for Distributed Document Capture Via the Adapter"](#) on page 2-16
- ["Test the Distributed Document Capture Via Siebel Adapter Configuration"](#) on page 2-16

2.4.1 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. 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 driver's 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 Oracle UCM using an Oracle 11g 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.

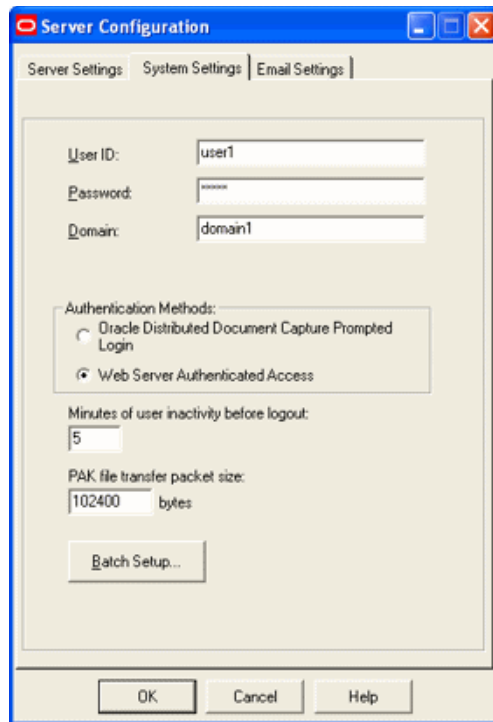
2.4.2 Configure Oracle Distributed Document Capture For the Siebel Adapter

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

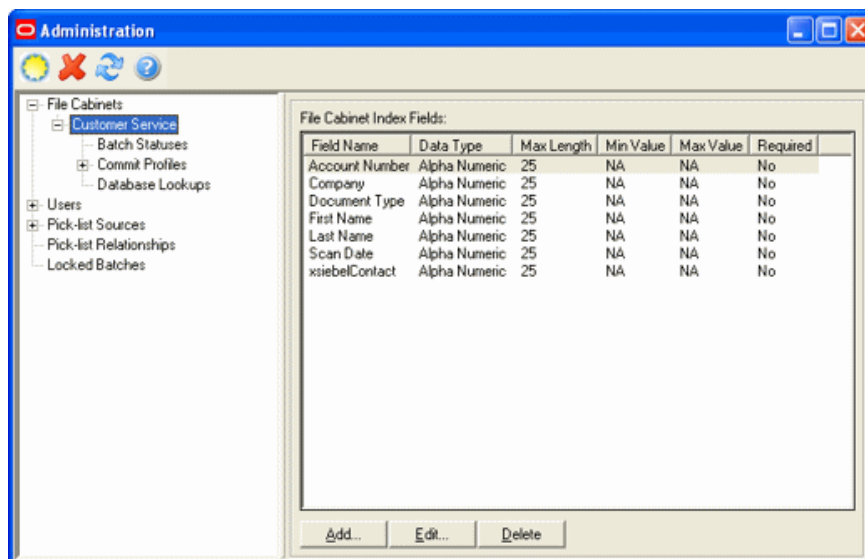


2. In Capture Administration, add index fields to a selected file cabinet for capturing values for new documents, as shown in [Figure 2-2](#). For details, see the section on Capture Administration in the *Administrator's Guide for Oracle Distributed Document Capture*.
 - Create index fields for values 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

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

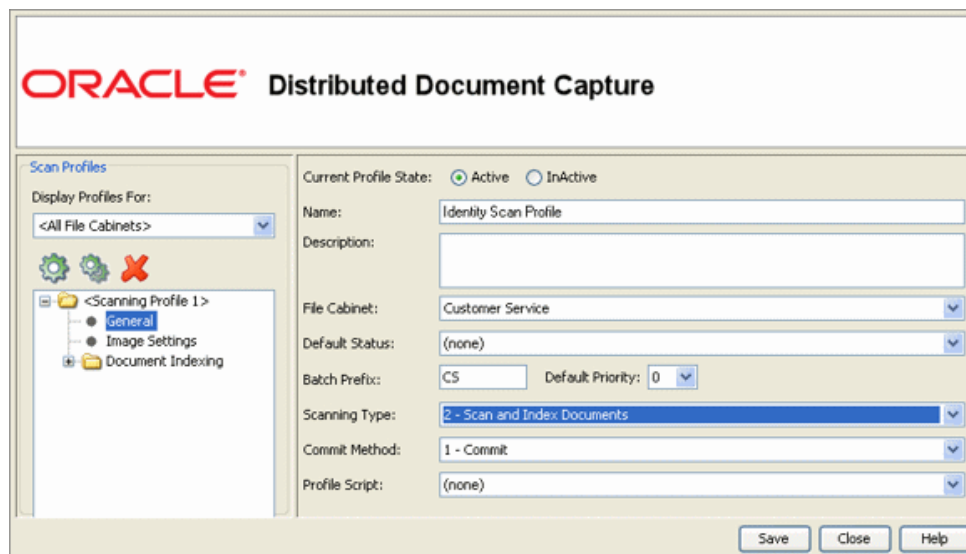


3. In Oracle Distributed Document Capture's Profile Administration, create a scan profile, as shown in [Figure 2-3](#). Later, you associate this scan profile with one or more document classifications, so that when a user selects a classification, the associated scan profile's settings are used. For 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 an Oracle UCM 11g commit profile to commit the scanned or imported documents to Oracle UCM when users send a completed batch. See [Figure 2-4](#).

Note: for information about downloading the Oracle UCM 11g commit driver for Capture, see "[System Requirements](#)" on page 2-1.

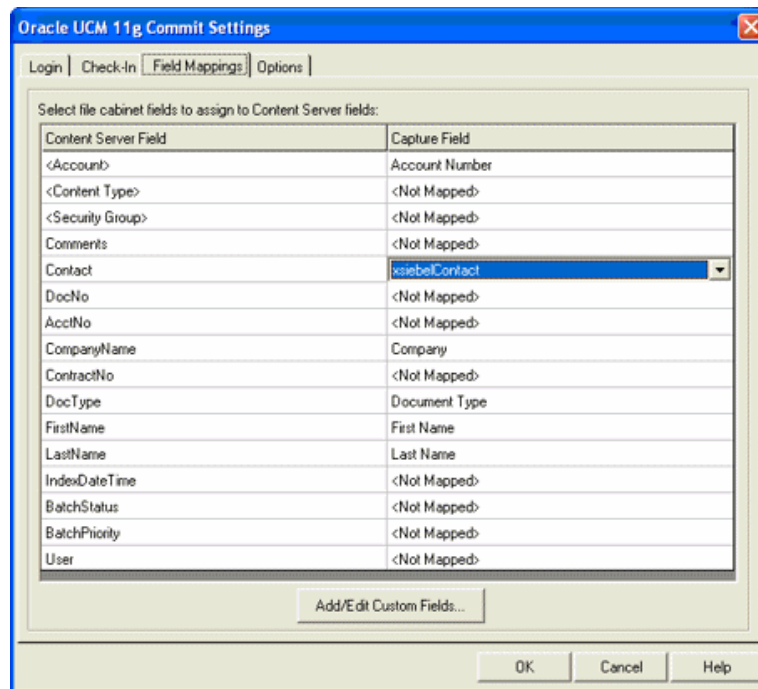
This commit profile specifies how to connect to the Content Server, and how the Siebel and Capture values are passed to the Content Server. For information about creating Oracle UCM 11g commit profiles, see the section on committing profiles in the *Administrator's Guide for Oracle Distributed Document Capture* and the *Oracle Distributed Document Capture/Oracle Document Capture Supplemental Administrator's Guide*.

- Select **Oracle UCM 11g 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 to name documents and assign Type, Security Group, and Account values.
- 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 Oracle UCM document to the Siebel record.

- Activate the Siebel-UCM commit profile.

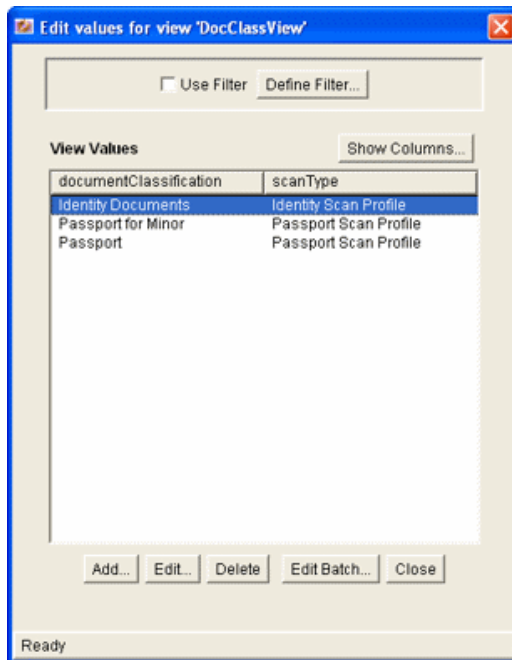
Figure 2–4 Capture Administration, Oracle UCM 11g Commit Settings



2.4.3 Configure Oracle UCM for Distributed Document Capture Via the 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 done so. See "[Set the Configuration Variables](#)" on page 2-3.
 - `ODDCURLPath=http://ODDC_host/ODDC_webcapture_address`
 - `ODDCScanAction=ODDC Scan Action`
 - `AdapterAppScanBtnVisible=true`
2. Restart Content Server.
3. 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**.



4. 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.
5. From the Options menu, select **Publish schema** to publish the data.

2.4.4 Test the Distributed Document Capture Via Siebel Adapter Configuration

Follow these steps to test the configuration as an end-user. For details about scanning using Oracle Distributed Document Capture as an end-user, see the *Oracle Distributed Document Capture User's Guide*.

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 Page**. The newly scanned document or imported scanned image file should be displayed in the list. (It may take a few minutes to be displayed.)

2.5 Passing Extra Metadata Parameters From Siebel to Oracle UCM

As part of an adapter configuration, you can pass one or more metadata values from Siebel to Oracle UCM for populating New and Scan button URLs within the Siebel iFrame. For example, whenever a user checks in a new document using 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 an Oracle 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) to populate on the Oracle UCM side.
- You add arguments to the symbolic URL (with the prefix *extra* added to the variable name) that link the Siebel and Oracle 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 might hide an account number, but for another value, you might populate a dropdown field and allow users to change the value.

Configuring extra metadata parameters involves the following main steps:

- ["Configure Oracle UCM for Extra Parameters"](#) on page 2-17
- ["Configure Siebel for Extra Parameters"](#) on page 2-18

2.5.1 Configure Oracle UCM for Extra Parameters

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

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

Specify the Oracle UCM field or fields to populate. Define *extraSiebelDocParams* to pass values using the New button, and *extraSiebelScanParams* to pass values using the Scan button. For information about configuration variables, see ["Set the Configuration Variables"](#) on page 2-3.

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

- extraSiebelDocParams=dDocAccount
- extraSiebelScanParams=dDocAccount

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

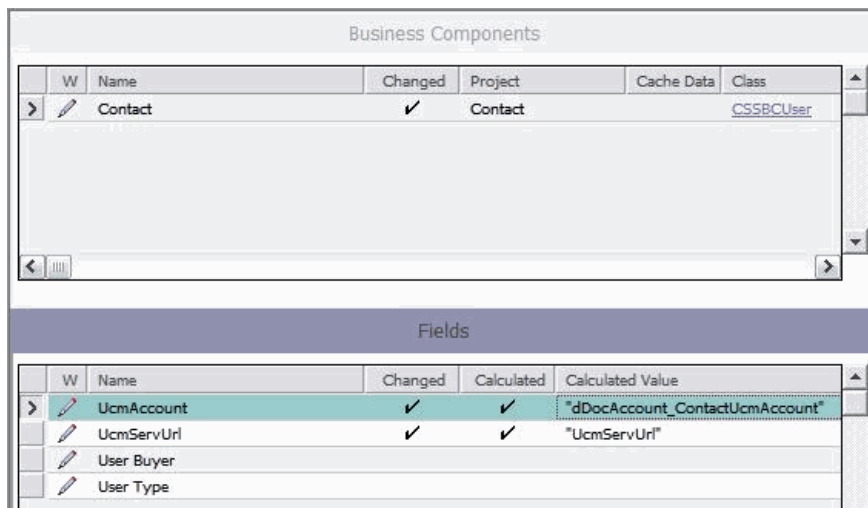
extraSiebelDocParams=dDocAccount,xsiebelOrder
 eextraSiebelScanParams=dDocAccount,dDocType

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

2.5.2 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 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 Oracle UCM metadata variable name of *dDocAccount* with the *extra* prefix).

Name	Required Argume	Argument Type	Argument Value	Append as	Substit	Sequen
extradocAccount	✓	Field	UcmAccount	✓		6
ldcService	✓	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.

2.6 Customizing the Siebel Adapter iFrame Display

You can customize the Siebel Adapter in the following ways:

- ["Add Custom Buttons"](#) on page 2-19
- ["Dynamically Change the Display Mode"](#) on page 2-20
- ["Change Display Colors"](#) on page 2-22

2.6.1 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 Oracle 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>
```

```

    };
  </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@>

```

2.6.2 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 2-3). Columns are displayed according to the user's field configuration settings, 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.

2.6.2.1 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 the integer value of each button and icon to be disabled.

For example, to disable the Edit and Properties icons and hide the New, Scan, Detach, and Configure buttons, calculate the SiebelDisplayMode value as follows:

$$21 + 22 + 23 + 24 + 25 + 28 = 318$$

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

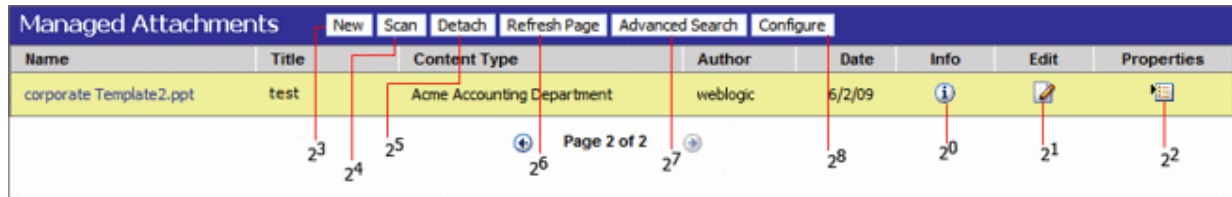


Table 2–4 Integer Values for Calculating a Display Mode Integer

Button or Icon	Integer Value
Info Icon	20
Edit Icon	21
Properties Icon	22
New Button	23
Scan Button	24
Detach Button	25
Refresh Button	26
Advanced Search Button	27
Configure Button	28

Note: To hide custom buttons, see "[Calculate Values for Custom Buttons](#)" on page 2-22.

2.6.2.2 Configure Siebel for Special Display Mode

After calculating a display mode integer, as described in "[Calculate the SiebelDisplayMode Integer](#)" on page 2-20, 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 2-8.
 - 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

Name	Required Argument	Argument Type	Argument Value	Append as	Substit	Sequen
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
SiebelDisplayMode	✓	Constant	318	✓		12

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

2.6.2.3 Calculate Values for Custom Buttons

If you have added custom buttons to the iFrame (as described in "Add Custom Buttons" on page 2-19) and want to hide them in an alternate display mode, 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 run time:

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:

Name	Title	Content Type	Author	Date	Info	Edit	Properties
corporate Template2.ppt	test	Acme Accounting Department	weblogic	6/2/09	29	210	

2.6.3 Change Display Colors

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

- background
 - highlighted row
 - hover row
- 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 (hexidecimal 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 Uninstalling the Adapter

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

- ["Disable Adapter Components on Content Server"](#) on page 2-23
- ["Uninstall Siebel Components"](#) on page 2-24

2.7.1 Disable Adapter Components on Content Server

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

1. Log in to Content Server as an administrator.
2. Select **Admin Server** from the Administration menu.
The Component Manager page is displayed.
3. Scroll to the **Integration** components section.
4. Deselect the Siebel adapter components to disable them.
 - SiebelEcmIntegration
 - SiebelIntegrationSearchDisplay
 - SiebelSearchExtension
 - SiebelSearchExtraParams

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

5. Click **Update**.
6. Restart Content Server.

Note: For information about restarting methods, see the section on starting, stopping, and restarting Content Server in the *Oracle Fusion Middleware System Administrator's Guide for Universal Content Management*.

2.7.2 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-4.

Siebel Object Locking

If you encounter issues when importing the SIF file and locking the Siebel Projects (see ["Lock Siebel Objects"](#) on page 2-6), 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 2-5).

Importing the SIF file deactivates certain Siebel applets. See ["Activating or Deactivating Siebel Objects"](#) on page A-4 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-4

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 2.3.1](#) locks the following objects:

- ["Projects Locked"](#) on page A-1
- ["Applets Locked"](#) on page A-2
- ["Views Locked"](#) on page A-3
- ["Business Components Locked"](#) on page A-4

A.1.1 Projects Locked

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

Projects	SIA	SEA
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

Table A-1 (Cont.) Projects Locked (SIA and SEA)

Projects	SIA	SEA
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

Applets	SIA	SEA
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

Table A-2 (Cont.) Applets Locked

Applets	SIA	SEA
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

Views	SIA	SIA
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

Business Components	SIA	SEA
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.

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